

6.5. RESIDENTIAL NEEDS ANALYSIS

REPORT AUTHOR	Neil Beck, Team Leader Planning
MANAGER	Paul Hoyer, Manager Environment and Planning
DEPARTMENT	Environment and Planning

RECOMMENDATION

That Council notes the Douglas Shire Residential Needs Assessment Report dated 12 June 2023 prepared by Bull & Bear Economics.

EXECUTIVE SUMMARY

Bull & Bear Economics were commissioned by Council to undertake a Residential Needs Assessment to investigate and report on numerous aspects of the residential housing market in the Shire.

The report was commissioned having regard to the increase in housing demand observed in the Shire and the Region post Covid-19, and to benchmark this growth against land designated to accommodate urban development in the current Planning Scheme. Other observations in the housing market included an increasingly tight rental market and difficulties experienced by a range of businesses to locate and retain staff due to the tight rental market and accommodation options.

Council is currently in the process of undertaking a Planning Scheme amendment, so it was an opportune time to undertake a study into the residential needs of the Shire and the socio-economic profile that underpins it.

The findings of the report were workshopped with Council on 2 May 2023 by Council planning staff and the author of the report, Shelly McCormack from Bull & Bear Economics. A copy of the report forms as an Attachment.

The report is presented to Council for noting.

BACKGROUND

Council engaged Bull & Bear Economics to undertake a residential needs assessment to investigate and report on a number of elements impacting the housing market in Douglas Shire and to determine if there is sufficient designated land to accommodate future population growth.

In undertaking the assessment, a range of data sources and aspects were considered. This included:

- 2021 Census outcomes, to understand the socio-economic characteristics of the resident population, including levels of mortgage and rental stress of the resident population;
- Historic population data published by the Australian Bureau of Statistics (ABS) to understand the geographic distribution of population growth;

- Historic residential building approvals with Douglas Shire and its statistical areas, to understand the distribution of dwelling growth, both geographically and by typology (i.e. attached vs detached dwelling development);
- Property market data published on the Pricer database, to understand property market trends at the suburb level for the past ten years (volume, value and median sales prices of houses, units and vacant residential land) to understand the historic distribution of demand within the region. The assessment has also considered the size of the residential rental market, including residential vacancy rates to understand how Douglas Shire compares to other regional coastal localities in Queensland;
- AirDNA data to understand the scale of the short-term accommodation market impacting the residential housing market;
- Queensland Government Statistician's Office population projections by SA2, to understand the anticipated growth outlook for the region, rebased and adjusted to reflect COVID-19 impacts on the region;
- Social housing data, to understand the scale of waitlists;
- Queensland government registers which identify the supply of manufactured homes, independent living units and aged care within Douglas Shire; and
- Data provided by Council regarding remaining capacity within zoned land to accommodate dwelling growth, converted to an indicative dwelling supply estimate.

COMMENTS

The report investigating the above forms Attachment 1. Amongst other items, the investigation identified:

- Housing stock is predominately characterised by detached dwellings outside of Port Douglas with a significant proportion of small dwellings (1 and 2 bedroom) in the Port Douglas statistical area as opposed to attached dwellings;
- Approximately 60% of housing stock in the Port Douglas & Craiglie area is currently being used for short term accommodation and therefore not available to the long term housing market;
- The analysis has identified that there remains sufficient capacity to accommodate population and dwelling growth within Douglas Shire to 2041. This is accommodated by take-up of large residential zoned allotments and existing subdivision approvals. This investigation has also taken into account under-utilised higher density residential zoned land in the Port Douglas and Craiglie localities;
- The investigation has highlighted an opportunity to provide for housing choice through the provision of semi attached and attached residential housing product. This finding is primarily targeted in the Mossman and coastal communities.

At the Council workshop held in May 2023, comments from Councillors raised specific concerns over workers accommodation and the ability to better understand the accommodation market for seasonal workers. The report has been amended to include some further detail on this sector (refer to Section 8.4 of the attached Report).

When viewing the increase in number of persons employed in the accommodation and food services sector in 2022 compared with previous years, it is predictable that there were challenges for those persons employed in this sector to find suitable accommodation (refer to Table 8-7 on page 69 of the attached Report to view details).

It is noted that the size of the seasonal workforce estimated in the report is based on assumptions made using data available at a regional level. Given the significance of the worker accommodation issue in the Douglas Shire, the longstanding nature of the problem, and the consideration that a major backpacker-accommodation business is poised to close to make way for a hotel development, it is important this issue is understood accurately for Douglas.

A recent review of availability of backpacker beds in Port Douglas indicated a total of 450 backpacker beds, all at capacity in July with a weight list of around 90 people. This highlights an opportunity for a Douglas-specific analysis to be undertaken to determine the size of the seasonal workforce in the Shire and the shortfall in suitable accommodation.

It is also important to note that approvals have issued for a Tourist Park adjacent the Captain Cook Highway to the north of the Port Douglas turn-off, in addition to interest being shown for other like development in the immediate vicinity.

FINANCIAL/RESOURCE IMPLICATIONS

As the investigation directly relates to land use and planning, the budget set aside for the Planning Scheme amendment was utilised.

The report will form part of Council's Local Housing Action Plan (LHAP) that is being prepared in association with the Local Government Association Queensland (LGAQ). The LHAP is a requirement of the State Government and is to be completed by March 2024.

RISK MANAGEMENT IMPLICATIONS

The investigation is necessary to ensure appropriate planning a sound governance is provided for the Shire. Investigations and studies, such as the Residential Needs Analysis forms key supporting information to enable Council to appropriately plan for, and accommodate future growth. The report will form part of Council's Local Housing Action Plan (LHAP).

SUSTAINABILITY IMPLICATIONS

- Economic:** Undertaking investigations to understand future growth implications and being able to appropriately plan for future development is key for the economic well-being of the region.
- Environmental:** Future development will be accommodated in an environmentally sensitive manner and in accordance with other over-arching principles of the Planning Scheme.
- Social:** Ensuring future housing needs are met is integral to providing a healthy and well-functioning community.

CORPORATE/OPERATIONAL PLAN, POLICY REFERENCE

This report has been prepared in accordance with the following:

Corporate Plan 2019-2024 Initiatives:

Theme 1 - Celebrating Our Communities

Douglas Shire Council embraces the diversity of our communities and values the contribution that all people make to the Shire. We recognise that it is a core strength of the region. We acknowledge our past so that it may guide us in the future. We recognise the wrongs done to our Indigenous community and we actively seek to reconcile so that we may all benefit from and enjoy our Shire. We acknowledge early European settlers who forged an agricultural base for our economy and we welcome all new arrivals as part of our broader community.

Goal 2 - *We will deliver programs and services that protect and enhance the liveability of our beautiful Shire.*

Goal 3 - *We will develop programs that promote health, well-being and safety in the community.*

Theme 2 - Fostering Sustainable Economic Growth

A robust economy is at the heart of a thriving community and enables investment in environmental protection. While our remoteness is a key attribute, it also presents challenges for attracting new business and investment. We must also meet the challenges of fierce competition in the tourism sector. Council will partner with industry to build, diversify and promote the Douglas economy. Council will design and deliver infrastructure, strategies and services that support the local economy and businesses.

Goal 1 - *We will build appropriate infrastructure and deliver services that connect and support businesses.*

Theme 4 - Inclusive Engagement, Planning and Partnerships

In delivering for our communities, economy and environment, Douglas Shire will ensure open and transparent engagement and communication. We will develop robust strategic plans and we will partner with our community and key stakeholders.

Goal 2 - *We will develop forward looking strategies for the future of our communities and we will ensure balanced and appropriate planning decisions.*

Operational Plan 2023-2024 Actions:

Planning Scheme Amendments to align the Scheme with the *Planning Act 2016* and improve the functionality of the Scheme - Planning Scheme Amendments to align the Scheme with the *Planning Act 2016* and improve the functionality of the Scheme.

Douglas Shire Housing Strategy - Continue to work with local service providers and all levels of government to find, advocate, and where appropriate, implement measures to address the housing shortage in Douglas.

COUNCIL'S ROLE

Council can play a number of different roles in certain circumstances and it is important to be clear about which role is appropriate for a specific purpose or circumstance. The implementation of actions will be a collective effort and Council's involvement will vary from information only through to full responsibility for delivery.

The following areas outline where Council has a clear responsibility to act:

Facilitator	Council often brings stakeholders together on important issues, projects or for service delivery. In this role, Council can act as a mediator, connector, collaborator or initiator.
Regulator	Council has a number of statutory obligations detailed in numerous regulations and legislative Acts. Council also makes local laws to ensure that the Shire is well governed. In fulfilling its role as regulator, Council will utilise an outcomes based approach that balances the needs of the community with social and natural justice.

CONSULTATION

Internal: Discussions undertaken with Community Development to establish scope of the report and to identify areas of particular interest. Report and findings distributed to other relevant departments and Management Team for review and comment.

External: The Report is to be used for internal purposes and will be used as a reference document. It is to be noted that the Department of State Development, Infrastructure Local Government & Planning (DSDILGP) are seeking access to the Report as part of the review of the FNQ Regional Plan & FNQ Infrastructure Plan.

It is also interesting to note that Bull & Bear Economics have been engaged by DSDILGP to undertake a similar study for the FNQ Region.

COMMUNITY ENGAGEMENT

Not Applicable.

ATTACHMENTS

1. Douglas Shire Residential Needs Assessment RE V 0 120623 - FINAL [6.5.1 - 90 pages]

12 June 2023

Douglas Shire Residential Needs Assessment

Douglas Shire Council



Document History

Version	Date Issued	Reviewed by	Approved by	Date Approved	Revision Type
Rev A	19 August 2022	S McCormack	S McCormack	19 August 2022	Draft
Rev B	20 February 2023	S McCormack	S McCormack	20 January 2023	Draft
Rev C	2 April 2023	S McCormack	S McCormack	2 April 2023	Draft Final
Rev 0	12 June 2023	S McCormack	S McCormack	12 June 2023	Final

Distribution of Copies

Version	Date Issued	Issued to
Rev A	19 August 2022	N Beck
Rev B	20 February 2023	N Beck
Rev C	2 April 2023	N Beck
Rev 0	12 June 2023	N Beck

Document Summary

Last Saved	12 June 2023
Author	N. Bess, M. McCarthy, M. Parker
Project Manager	S. McCormack
Client	Douglas Shire Council
Document Title	220053 RPT BBE Douglas Shire Residential Needs Assessment REVB 120623
Document Version	Rev 0
Project Number	220053

Disclaimer:

This report has been based upon the most up to date readily available information at this point in time, as documented in this report. Bull & Bear Economics has applied due professional care and diligence in accordance with generally accepted standards of professional practice in undertaking the analysis contained in this report from these information sources. Bull & Bear Economics shall not be liable for damages arising from any errors or omissions which may be contained within these information sources.

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.

Table of Contents

1	Introduction	1
1.1	Report Structure	1
2	Background Assessment	3
2.1	Socio-Economic Profile	3
2.2	Trends in Population Growth.....	6
2.2.1	Historic Population	8
2.2.2	Components of Population Growth.....	10
2.3	Residential Dwelling Approvals	12
2.3.1	New House Approvals by SA2.....	12
2.3.2	New Other Residential Approvals by SA2.....	13
2.4	Property Market Overview	14
2.4.1	Detached Dwellings.....	14
2.4.2	Attached Dwellings	17
2.4.3	Vacant Residential Land	20
2.4.4	Residential Vacancy Rates	24
2.4.5	Median Weekly Rents.....	25
2.5	Unoccupied Private Dwellings	27
2.6	Mortgage & Rental Stress.....	27
2.7	Implications for Douglas Shire.....	28
3	Short Term Accommodation Market	30
3.1	Number of Active Rentals	30
3.2	Average Number of Bedrooms	31
3.3	Proportion of Properties Available Full Time	31
4	Projected Population, Dwellings and Households	32
4.1	Population Projections.....	32
4.2	Dwelling Projections.....	34
4.2.1	Total Dwelling Projections	34
4.2.2	Dwelling Projections by Number of Bedrooms.....	34
4.3	Household Projections	35
4.3.1	Household Projections by Number of Persons.....	35
4.3.2	Household Projections by Family Structure.....	36
5	Estimated Dwelling Capacity	38
5.1	Vacant Residential Land without an Existing Approval	38
5.2	Underutilised Residential Land without an Existing Approval	39
5.3	Existing Approvals for Residential Uses	39
5.4	Dwelling Capacity for Vacant and Underutilised Sites without an Approval	40
5.4.1	Assumed Densities for Vacant and Underutilised Land	40
5.4.2	Vacant Dwelling Yield.....	40
5.4.3	Underutilised Dwelling Yield.....	42
5.4.4	Summary	42
6	Demand for Specialised Housing Typologies.....	44
6.1	Population Projections for Relevant Age Cohorts	44
6.2	Retirement Living Assessment.....	45
6.2.1	Existing, Pending & Approved Supply	45
6.2.2	Historic Take-up Rates	45
6.2.3	Projected Demand	46
6.2.4	Supply Demand Balance	48
6.3	Residential Aged Care	50

6.3.1	Existing, Pending & Approved Supply	51
6.3.2	Demand & Supply Assessment	52
6.4	Key Findings	53
6.4.1	Context	53
6.4.2	Key Findings	53
7	Housing Need by Typology	56
7.1	Existing & Projected Housing Need	56
7.2	Adjustments to Dwelling Stock	58
7.3	Housing Need by Dwelling Size	59
7.4	Housing Need by Dwelling Type	59
7.4.1	Historic Distribution of Dwelling Stock	59
7.4.2	Dwelling Projections by Type	60
7.5	Supply Demand Balance	61
8	Other Considerations	63
8.1	Social Housing	63
8.2	Supply of Rental Dwellings from State/Territory Housing Authority or Community Housing Provider	65
8.3	Homelessness in Douglas Shire	67
8.4	Affordable Rental Dwellings Demand	68
8.5	Accommodating the Seasonal Workforce	69
8.6	Key Findings	70
9	Summary	72
10	Appendix	73
10.1	Appendix A Property Market Overview	73
10.2	Appendix B Vacant and Underutilised Residential Land	80
10.3	Appendix C Housing Need Projections	83

List of Tables

Table 2-1	Socio-Economic Profile – Port Douglas SA2, Daintree SA2, Douglas Shire and Queensland, 2021	5
Table 2-2	Concordance of SA1s to Localities – Douglas Shire	7
Table 2-3	Historic Population – Localities, Port Douglas SA2, Daintree SA2, Douglas Shire, Queensland, 2011 to 2021	9
Table 2-4	Median Sale Price for Detached Dwellings – Douglas Shire, 2012-13 to 2021-22	17
Table 2-5	Median Sale Price for Attached Dwelling Sales – Douglas Shire, 2012-13 to 2021-22	20
Table 2-6	Median Price per Square Metre – Douglas Shire, 2012-13 to 2021-22	22
Table 2-7	Median Allotment Size (sqm) – Douglas Shire	23
Table 2-8	Average Annual Growth in Median Weekly Rents by Property Type, Dec Q 12 to Dec Q 22	26
Table 2-9	Unoccupied Private Dwellings – Port Douglas SA2, Daintree SA2, and Douglas Shire, 2021	27
Table 2-10	Mortgage and Rental Stress – Port Douglas SA2, Daintree SA2, Douglas Shire, Cairns Regional Council, Townsville City Council, Livingstone Shire Council, Queensland, 2021	28
Table 3-1	Number of Active Rentals by Type, Douglas and Key Neighbourhoods	31

Table 3-2	Distribution of Active Rentals by Number of Bedrooms, Douglas and Key Neighbourhoods	31
Table 3-3	Distribution of Active Rentals Available Full Time, Douglas and Key Neighbourhoods.....	31
Table 4-1	Assumed Distribution of Population Growth, Port Douglas and Daintree SA2s, 2021 to 2041	33
Table 4-2	Projected Population by SA2, 2021 to 2041	33
Table 4-3	Total Dwelling Projections and Household Size – Port Douglas SA2, Daintree SA2, and Douglas Shire, 2021 to 2041	34
Table 4-4	Dwelling Projections by Number of Bedrooms – Douglas Shire by SA2, 2021 to 2041	35
Table 4-5	Household Projections by Number of Persons per Household – Douglas Shire by SA2, 2021 to 2041	36
Table 4-6	Household Projections by Household Composition – Douglas Shire by SA2, 2021 to 2041	37
Table 5-1	Area of Vacant Residential Land (Ha) by Zone – Douglas Shire, August 2022	39
Table 5-2	Underutilised Residential Land (Ha) by Zone – Douglas Shire, August 2022	39
Table 5-3	Significant Approved and Anticipated Residential Developments – Douglas Shire, 2022	39
Table 5-4	Yield Assumptions – Douglas Shire	40
Table 5-5	Estimated Yield of Vacant Residential Land without an Existing Approval – Douglas Shire, 2022	41
Table 5-6	Yield of Underutilised Residential Land – Douglas Shire, 2022	42
Table 5-7	Estimated Remaining Capacity by SA2	43
Table 6-1	Retirement Village ILUs and Residential Aged Care Places Demand Methodology	44
Table 6-2	Estimated Residential Population by Age Group – Douglas Shire, 2021 to 2041	44
Table 6-3	Historic Take-up rates of Retirement Living by Statistical Geography – Far North Queensland, 2011 and 2016.....	46
Table 6-4	Scenario One: Demand for Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) – Douglas Shire, 2021 to 2041	47
Table 6-5	Scenario Two: Demand for Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) – Douglas Shire, 2021 to 2041	47
Table 6-6	Scenario Three: Demand for Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) – Douglas Shire, 2021 to 2041	48
Table 6-7	Scenario One: Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) Supply Demand Balance – Douglas Shire, 2021 to 2041	48
Table 6-8	Scenario Two: Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) Supply Demand Balance – Douglas Shire, 2021 to 2041	49
Table 6-9	Scenario Three: Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) Supply Demand Balance – Douglas Shire, 2021 to 2041	49
Table 6-10	Scenario Comparison of Supply Demand Balance of Retirement ILU/Manufactured Home Park Dwellings – Douglas Shire, 2021 to 2041	50
Table 6-11	Residential Aged Care Places – Douglas Shire, 30 June 2021	51
Table 6-12	Demand for Residential Aged Care Places – Douglas Shire, 2021 to 2041	52
Table 6-13	Residential Aged Care Facilities Supply Demand Balance – Douglas Shire, 2021 to 2041	52
Table 7-1	Small, Medium and Large Households to Dwelling Ratio– Douglas Shire, 2021 and 2041	57
Table 7-2	Adjusted Small, Medium and Large Households to Dwelling Ratio – Douglas Shire, 2021 and 2041	59
Table 7-3	Small, Medium and Large Households – Douglas Shire, 2021 and 2041	59
Table 7-4	Distribution of Housing Stock – Douglas Shire, 2021	60
Table 7-5	Assumed Distribution of Additional Dwellings – Douglas Shire, 2021-2041	61
Table 7-6	Dwelling Projections by Type – Douglas Shire, 2021 to 2041	61

Table 7-7	Supply Demand Balance (dwellings) by SA2, 2021-2041	62
Table 8-1	Flagged Applications – Douglas Shire, 2020-21 to 2021-22	65
Table 8-2	Affordable Rental Dwellings as a Proportion of Total Dwellings – Douglas Shire, 2016 to 2021	66
Table 8-3	Distribution of Affordable Rental Dwellings by Dwelling Type – Port Douglas SA2, Daintree SA2 and Douglas Shire, 2016 and 2021	67
Table 8-4	Homelessness Rate – Port Douglas – Daintree SA3 and Surrounding SA3s, 2016	67
Table 8-5	Homelessness Operational Groups – Port Douglas – Daintree SA3, 2016 and 2021	68
Table 8-6	Affordable Rental Dwellings Demand – Douglas Shire by SA2, 2021 to 2041	68
Table 8-7	Difference between Peak and Lowest Employment by Year, Cairns SA4, 2012-2022	69
Table 8-8	Age Distribution of Persons Residing in Affordable Rental Dwellings – Douglas Shire, 2016	71
Table 10-1	Volume of Detached Dwelling Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22	73
Table 10-2	Value of Detached Residential Land Sales (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22	74
Table 10-3	Median Sale Price for Detached Dwellings – Suburbs within Douglas Shire, 2012-13 to 2021-22	75
Table 10-4	Volume of Attached Dwelling Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22	76
Table 10-5	Value of Attached Dwelling Sales (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22	76
Table 10-6	Median Sale Price for Attached Dwellings (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22	76
Table 10-7	Volume of Vacant Residential Land Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22	77
Table 10-8	Value of Vacant Residential Land Sales (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22	78
Table 10-9	Median sale Price per Square Metre for Vacant Residential Land Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22	79
Table 10-10	Vacant Residential Land (Ha) without an Approval by Zone – Douglas Shire, August 2022	80
Table 10-11	Underutilised Residential Land (Ha) by Zone – Douglas Shire, August 2022	81
Table 10-12	Area of Approved Developments on Vacant Residential Land (Ha) by Zone – Douglas Shire, August 2022	82
Table 10-13	Small, Medium and Large Households to Dwelling Projections, Douglas Shire, 2021 and 2041	83

List of Figures

Figure 2-1	Regional Context – Douglas Shire, Port Douglas SA2 and Daintree SA2, 2021 Census Boundaries	3
Figure 2-2	Components of Population Growth – Douglas Shire, 2017 to 2021	11
Figure 2-3	Components of Population Growth – Port Douglas SA2, 2017 to 2021	11
Figure 2-4	Components of Population Growth – Daintree SA2, 2017 to 2021	12
Figure 2-5	Residential Building Approvals – New Houses, Port Douglas SA2 and Daintree SA2, 2012-13 to 2021-22	13
Figure 2-5	Residential Building Approvals – New Other Residential Approvals, Port Douglas SA2 and Daintree SA2, 2012-13 to 2021-22	14
Figure 2-5	Volume of Detached Dwelling Sales, Douglas Shire, 2012-13 to 2021-22	15

Figure 2-6	Value of Detached Dwelling Sales (\$m) – Douglas Shire, 2012-13 to 2021-22	16
Figure 2-7	Volume of Attached Dwelling Sales – Douglas Shire, 2012-13 to 2021-22	18
Figure 2-8	Value of Attached Dwelling Sales – Douglas Shire, 2012-12 to 2021-22.....	19
Figure 2-9	Volume of Vacant Residential Land Sales – Douglas Shire, 2012-13 to 2021-22	21
Figure 2-10	Value of Vacant Residential Land Sales – Douglas Shire, 2012-13 to 2021-22	22
Figure 2-11	Residential Vacancy Rates – Port Douglas, Daintree, Cairns, Townsville and Yeppoon, December 2011 to December 2022.....	25
Figure 2-12	Median Weekly Rent by Property Type and Postcode, December Quarter 2012 to December Quarter 2022.....	26
Figure 6-1	Aged Care Planning Regions 2018 - Queensland	51
Figure 8-1	Number of Social Housing Applications – Douglas Shire, 2016-17 to 2021-22	63
Figure 8-2	Average Number of Months Spent on Social Housing Register – Douglas Shire, 2016-17 to 2021-22	64
Figure 8-3	Household Type as an Average Proportion of Social Housing Applications – Douglas Shire, 2016-17 to 2021-22	65

1 Introduction

Bull & Bear Economics was engaged by Douglas Shire Council to undertake a residential needs analysis to determine whether there is need to provide additional land supply with Douglas Shire to meet the future needs of the community. In undertaking this assessment, consideration has been given to a range of data sources, including:

- + 2021 Census outcomes, to understand the socio-economic characteristics of the resident population, including levels of mortgage and rental stress of the resident population;
- + Historic population data published by the Australian Bureau of Statistics (ABS) to understand the geographic distribution of population growth;
- + Historic residential building approvals with Douglas Shire and its component SA2s, to understand the distribution of dwelling growth, both geographically and by typology (i.e. attached vs detached dwelling development);
- + Property market data published on the Pricfinder database, to understand property market trends at the suburb level for the past ten years (volume, value and median sales prices of houses, units and vacant residential land) to understand the historic distribution of demand within the region. The assessment has also considered the size of the residential rental market, including residential vacancy rates to understand how Douglas Shire compares to other regional coastal localities in Queensland. Coll also be provided on how affordability may be impacting the ability to attract and retain workers, particularly within the tourism and hospitality sectors;
- + AirDNA data to understand the scale of the short term accommodation market impacting the residential housing market;
- + Queensland Government Statistician's Office population projections by SA2, to understand the anticipated growth outlook for the region, rebased and adjusted to reflect COVID-19 impacts on the region;
- + Social housing data, to understand the scale of waitlists;
- + Queensland government registers which identify the supply of manufactured homes, independent living units and aged care within Douglas Shire; and
- + Data provided by Council regarding remaining capacity within zoned land to accommodate dwelling growth, converted to an indicative dwelling supply estimate.

These data sources have been utilised as an evidence base and compared against projections of dwelling demand (by typology and location) to understand whether sufficient residential land supply remains to accommodate population and dwelling growth within Douglas Shire and its component SA2s.

1.1 Report Structure

This report is structured as follows:

- + **Section 1 Introduction:** summarises the purpose of the report and outlines report structure;
- + **Section 2 Background Assessment:** this section provides an overview of demographic and socio-economic characteristics of Douglas Shire. This section also analyses demographic data and information relating to specific property market trends over the past decade;
- + **Section 3 Size and Scale of Short Term Accommodation Market:** this section provides an overview of the size and scale of the short term accommodation market in Douglas Shire,

based on publicly available data published on AirDNA. The information in this section of the report is utilised to adjust estimates of the housing stock within Douglas Shire;

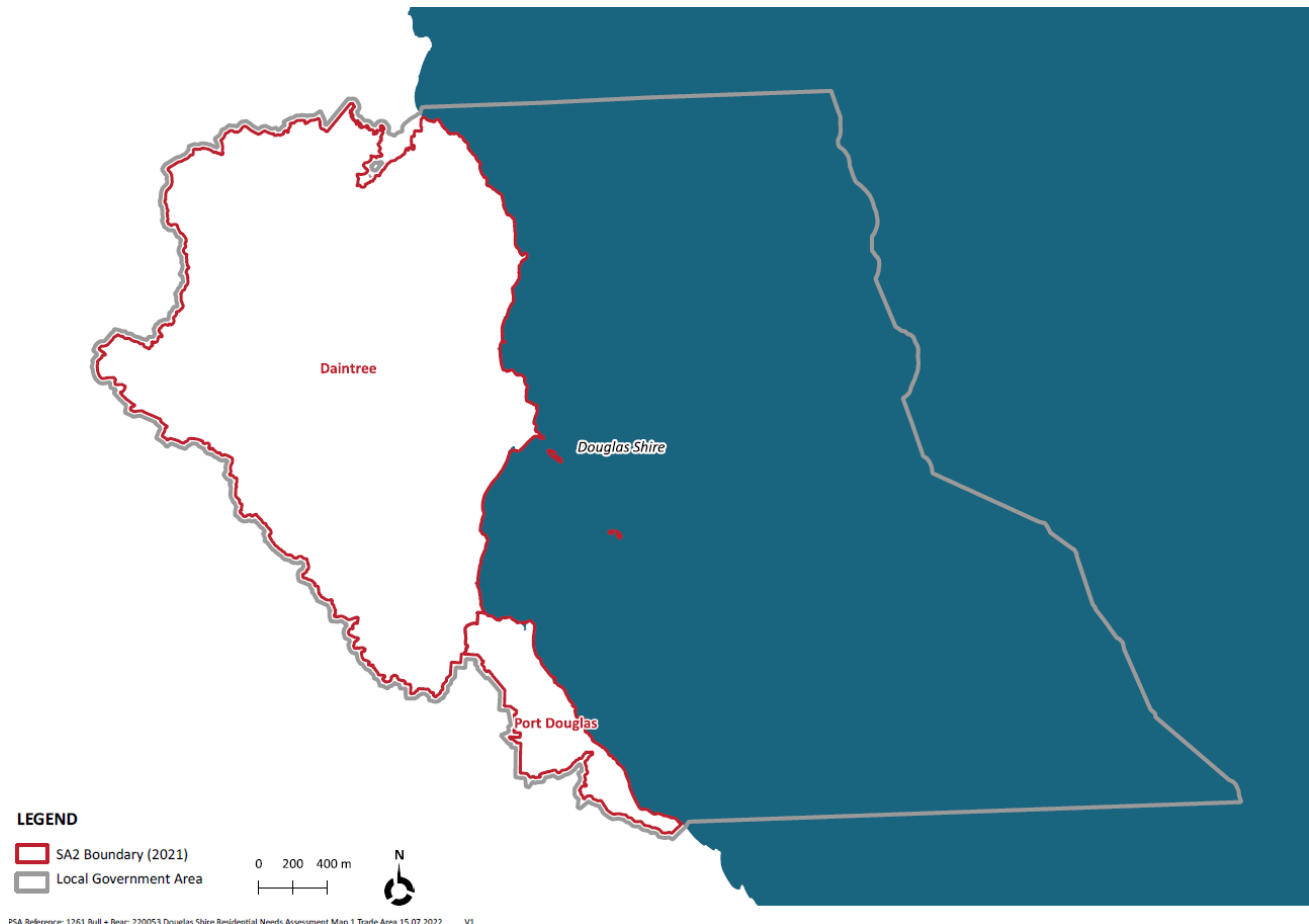
- + **Section 4 Population and Dwelling Projections:** outlines the population projections for Douglas Shire and its component areas and utilises historic trends in household compositions and dwelling structure to inform dwelling projections by dwelling structure;
- + **Section 5 Estimated Dwelling Capacity:** summarises the estimated dwelling capacity by assessing vacant and underutilised residential land available in Douglas Shire;
- + **Section 6 Demand for Specialised Housing Typologies:** examines the demand for retirement village ILUs (including manufacture home park sites) and residential aged care places within Port Douglas SA2, Daintree SA2 and Douglas Shire as a whole. It also considers existing and approved supply for retirement villages ILUs (and manufactured home park sites) and residential aged care places within Douglas Shire;
- + **Section 7 Housing Need by Typology:** displays the existing and projected housing need based on the size of households and the size of dwellings (i.e., small household to small dwelling ratio);
- + **Section 8 Housing Need Projections:** examines two alternative scenarios (business as usual and with policy intervention) and outlines the existing and projected dwelling supply as a result of the two scenarios;
- + **Section 9 Other Considerations:** examines housing affordability through the relevance of affordable rental dwellings and homelessness as issues within Douglas Shire; and
- + **Section 10 Summary:** summarises the key findings of this report regarding the residential needs of Douglas Shire.

2 Background Assessment

The purpose of the background assessment is to provide an overview of the characteristics and trends evident in the population and property market of Douglas Shire and its component SA2s.

Figure 2-1 details the boundary of Douglas Shire and its component Statistical Area Level 2 (SA2) boundaries. All boundaries used in this assessment are based on 2021 Australian Bureau of Statistics areas, unless otherwise stated.

Figure 2-1 Regional Context – Douglas Shire, Port Douglas SA2 and Daintree SA2, 2021 Census Boundaries



2.1 Socio-Economic Profile

The 2021 Census of Population and Housing has been utilised to construct a socio-economic summary of the Port Douglas and Daintree SA2s, benchmarked to Douglas Shire, and Queensland. The key demographic and socio-economic characteristics of the listed areas are as follows:

- + Within the Port Douglas SA2 and Daintree SA2, the largest incidence of residents was in the 65 years and older cohort, whereby 20.7% of both SA2s were comprised of this age cohort. This was slightly below Douglas LGA levels (20.9%) but higher than Queensland levels (17.0%);
- + As a result of the ageing demographics, the average age of residents within the Port Douglas SA2 (44.1 years) was higher than Douglas Shire (43.6 years) and Queensland (39.3 years). However, the Daintree SA2 observed an average age (43.0 years) lower than Douglas Shire, but higher than Queensland;
- + Unlike the trends observed within the broader Queensland population, the Port Douglas SA2 was comprised of almost 59.1% of couple families without children and only 29.8% couple

families with children. The Daintree SA2 recorded similar trends, however, this SA2 recorded an incidence of single parent families on-par with Queensland levels (16.8%) but higher than Douglas LGA levels (14.0%);

- + The average household size within the Port Douglas SA2 (2.2 residents per household) was slightly lower than the average household size recorded in the Daintree SA2 (2.3 residents per household). The average household size in Douglas Shire was significantly lower than in Queensland (2.8 residents per household);
- + The Port Douglas SA2 comprised of a higher proportion of households being rented over any other ownership (36.0% of households) and as a result the average weekly rent payments within this SA2 were higher than Daintree SA2 and Douglas LGA levels);
- + The Daintree SA2 was comprised of a higher proportion of fully owned households (37.6% of households) than both the LGA (34.7% of households) and Queensland (29.1% of households);
- + Average weekly household income was highest within the Port Douglas SA2 (\$1,708 per week) than the Daintree SA2 (\$1,493 per week) and Douglas Shire (\$1,587 per week). Queensland average weekly household incomes were highest as of the 2021 Census with households earning approximately \$1,952 per week; and
- + As of 2021, average housing costs as a proportion of household income was highest within the Port Douglas SA2 (15.0% of income) as a result of higher monthly loan repayments and weekly rent payments. This proportion of household income was significantly lower within the Daintree SA2 (12.3% of income) when compared to Douglas Shire (13.6% of income) and Queensland (14.2% of income) levels.
- + As of 2021, full-time employment was highest within the Daintree SA2 (51.0% of the labour force) when compared to the Port Douglas SA2 (49.6% of the labour force). Notably, 41.5% of the labour force in the Port Douglas SA2 was comprised of persons employed on a part-time basis. This level of part-time employment was higher than recorded in the Daintree SA2 and the benchmark areas.
- + The overall labour force participation rate within the relevant assessment areas was higher in Port Douglas SA2 (60.1% of the labour force), while Daintree SA2 recorded a lower labour force participation rate in 2021 (54.5% of the labour force);
- + Port Douglas SA2 recorded the highest incidence of residents with post-school qualifications (53.0% of residents) in 2021 aligning with the SA2's low unemployment rate (3.8% of the labour force). Daintree SA2 recorded the highest incidence of residents with certificate qualifications (27.0% of residents) aligning with the SA2's high levels of upper and lower blue-collar employees;
- + Both SA2s recorded a higher incidence of upper white-collar employees when compared to levels recorded in Douglas Shire as a whole. Overall, the proportion of upper blue-collar workers was higher in the Daintree SA2 (16.9% of employees) when compared to the Port Douglas SA2 and benchmarked areas; and
- + The most common industries of employment for Port Douglas SA2 as of the 2021 Census were Accommodation and Food Services (33.7% of employees), Health Care and Social Assistance (9.1% of employees), and Construction (7.5% of employees). The most common industries of employment for the Daintree SA2 were Accommodation and Food Services (13.9% of employees), Health Care and Social Assistance (13.5% of Employees), and Education and Training (11.3% of employees).

Table 2-1 below summaries the socio-economic characteristics of the Port Douglas SA2 and Daintree SA2 as of the 2021 Census, benchmarked to Douglas Shire and Queensland.

Table 2-1 Socio-Economic Profile – Port Douglas SA2, Daintree SA2, Douglas Shire and Queensland, 2021

	Port Douglas SA2	Daintree SA2	Douglas Shire	Queensland
Age Distribution				
0-14 years	11.2%	18.1%	15.0%	18.7%
15-24 years	8.1%	9.0%	8.5%	12.4%
25-34 years	17.3%	8.7%	12.6%	13.6%
35-44 years	12.9%	11.5%	12.1%	13.3%
45-54 years	13.6%	15.1%	14.4%	13.1%
55-64 years	16.2%	17.0%	16.5%	11.9%
65+ years	20.7%	20.7%	20.9%	17.0%
Average age (years)	44.1	43.0	43.6	39.3
Household Type (% of families)				
Couple families with children	29.8%	33.7%	31.9%	41.2%
Couple families without children	59.1%	47.4%	52.4%	40.3%
Single parent family	10.2%	16.8%	14.0%	16.8%
Other	0.9%	2.1%	1.7%	1.6%
Average household size	2.2	2.3	2.3	
Average vehicle ownership	1.6	1.8	1.7	1.8
Household Finances				
% of households fully owning home	30.9%	37.6%	34.7%	29.1%
% of households purchasing home	30.3%	30.9%	30.5%	34.4%
% of households renting	36.0%	26.6%	30.7%	33.1%
Average weekly household income	\$1,708	\$1,493	\$1,587	\$1,952
Average monthly housing loan repayment	\$1,736	\$1,548	\$1,635	\$1,911
Average weekly rent payment	\$376	\$278	\$329	\$379
Average housing costs (as a % of income)	15.0%	12.3%	13.6%	14.2%
Labour Market				
Full-time employment (% labour force)	49.6%	51.0%	50.2%	56.8%
Part-time employment (% labour force)	41.5%	39.6%	40.4%	31.0%
Unemployment rate	3.8%	4.5%	4.3%	5.5%
Participation rate (% of population > 15 years)	60.1%	54.5%	57.0%	61.2%
Qualifications				
% of persons with a post-school qualification	53.0%	46.5%	49.7%	53.5%
% of persons with Bachelor or higher	20.5%	11.8%	16.0%	21.9%
% of persons with Diploma	10.5%	7.8%	9.1%	9.4%
% of persons with Certificate	22.0%	27.0%	24.7%	22.1%
Occupation				
Upper White Collar				
Managers	15.4%	12.6%	14.0%	12.8%
Professionals	12.8%	13.0%	12.9%	21.8%

	Port Douglas SA2	Daintree SA2	Douglas Shire	Queensland
<i>Subtotal</i>	28.2%	25.6%	26.9%	34.6%
Lower White Collar				
Clerical and Admin Workers	9.0%	10.7%	9.9%	12.9%
Community & Personal Service Workers	18.1%	14.8%	16.5%	12.6%
Sales Workers	10.5%	9.6%	10.0%	8.8%
<i>Subtotal</i>	37.6%	35.1%	36.4%	34.3%
Upper Blue Collar				
Technicians & Trades Workers	15.8%	16.9%	16.4%	13.9%
<i>Subtotal</i>	15.8%	16.9%	16.4%	13.9%
Lower Blue Collar				
Machinery Operators & Drivers	3.3%	7.3%	5.2%	7.0%
Labourers	15.1%	15.2%	15.1%	10.3%
<i>Subtotal</i>	18.4%	22.5%	20.3%	17.2%
Employment by Industry (% of employees)				
Agriculture, forestry & fishing	1.3%	4.6%	2.8%	1.9%
Mining	1.4%	2.8%	2.1%	2.5%
Manufacturing	3.4%	4.6%	3.8%	5.3%
Electricity, gas, water & waste services	0.3%	1.2%	0.8%	1.3%
Construction	7.5%	9.4%	8.3%	9.6%
Wholesale trade	0.3%	1.0%	0.7%	2.1%
Retail trade	6.4%	7.0%	6.7%	6.7%
Accommodation & food services	33.7%	13.9%	24.0%	5.1%
Transport, postal & warehousing	7.1%	5.0%	6.2%	4.1%
Information media & telecommunications	0.6%	0.4%	0.6%	1.0%
Financial & insurance services	0.7%	0.5%	0.7%	2.9%
Rental, hiring & real estate services	2.9%	1.9%	2.3%	1.8%
Professional, scientific & technical services	5.2%	3.7%	4.5%	8.5%
Administrative & support services	5.3%	6.1%	5.6%	3.1%
Public administration & safety	4.3%	7.0%	5.7%	7.2%
Education & training	4.5%	11.3%	7.7%	11.6%
Health care & social assistance	9.1%	13.5%	11.1%	19.4%
Arts & recreation services	2.2%	1.7%	2.1%	1.5%
Other services	3.9%	4.4%	4.2%	4.4%

Note: All Labour Force, Qualification, and Industry Data is 2016 data due to availability of 2021 Census Data as of July 2022.
 Source: ABS Census of Population and Housing (2021)

2.2 Trends in Population Growth

This section details the historic population growth in Douglas Shire, and its component areas, and also identifies the historic drivers of population growth in each area.

The 2018 Douglas Shire Council Planning Scheme comprises the following residential zones:

- + Low Density Residential;
- + Low-Medium Density Residential;
- + Medium Density Residential; and

- + Rural Residential.

Within Douglas Shire, residential zoned land is located within the following localities:

- + Low Density Residential: Port Douglas, Craiglie, Mossman, Mossman Gorge, Wangetti, Oak Beach, Bonnie Doon, Cooya Beach, Newell, Wonga Beach and Daintree;
- + Low-Medium Density Residential: Port Douglas, Craiglie and Mossman;
- + Medium Density Residential: Port Douglas, Craiglie; and
- + Rural Residential: Mossman, Oak Beach, Mowbray and Wonga Beach.

The study has also considered the capacity for Tourism Accommodation zoned land to accommodate dwelling growth within Douglas Shire. Tourism Accommodation zoned land was identified in the suburbs of Port Douglas, Craiglie, Oak Beach and Mossman.

Historic population data is available at both the SA1 and SA2 level. To provide further context regarding the geographic location of historic population growth with Douglas Shire, the assessment has considered SA1 data in conjunction with SA2 data.

There were 13 residential localities identified within Douglas Shire, with the concordance of each locality to SA1 boundaries outlined in Table 2-2 below.

Table 2-2 Concordance of SA1s to Localities – Douglas Shire

Locality	SA1	SA2
Port Douglas	<ul style="list-style-type: none"> ▪ 3116502 ▪ 3116517 ▪ 3116518 ▪ 3116508 ▪ 3116516 ▪ 3116514 ▪ 3116505 ▪ 3116501 ▪ 3116506 ▪ 3116519 ▪ 3116503 	Port Douglas SA2
Craiglie	<ul style="list-style-type: none"> ▪ 3116519 ▪ 3116520 ▪ 3116513 	Port Douglas SA2
Mossman	<ul style="list-style-type: none"> ▪ 3116421 ▪ 3116419 ▪ 3116401 ▪ 3116405 ▪ 3116404 ▪ 3116403 ▪ 3116402 ▪ 3116421 	Daintree SA2
Mossman Gorge	<ul style="list-style-type: none"> ▪ 3116416 ▪ 3116408 	Daintree SA2
Wangetti	<ul style="list-style-type: none"> ▪ 3116511 	Port Douglas SA2
Oak Beach	<ul style="list-style-type: none"> ▪ 3116509 	Port Douglas SA2
Bonnie Doon	<ul style="list-style-type: none"> ▪ 3116421 ▪ 3116422 	Daintree SA2
Cooya Beach	<ul style="list-style-type: none"> ▪ 3116421 ▪ 3116406 	Daintree SA2
Newell	<ul style="list-style-type: none"> ▪ 3116421 ▪ 3116407 	Daintree SA2
Wonga Beach	<ul style="list-style-type: none"> ▪ 3116410 ▪ 3116412 ▪ 3116411 	Daintree SA2
Daintree	<ul style="list-style-type: none"> ▪ 3116420 	Daintree SA2
Mowbray	<ul style="list-style-type: none"> ▪ 3116511 	Port Douglas SA2
Rural Balance	<ul style="list-style-type: none"> ▪ 3116414 ▪ 3116413 ▪ 3116417 ▪ 3116409 	Daintree SA2

Source: Bull & Bear Economics (2022)

2.2.1 Historic Population

In the 2011 to 2021 period, the localities within Douglas Shire which recorded the most significant population growth were:

- + Bonnie Doon, with an additional 440 persons between 2011 and 2021;
- + Port Douglas, with an additional 436 persons between 2011 and 2021;
- + Craiglie, with an additional 258 persons between 2011 and 2021; and
- + Mossman, with an additional 220 persons between 2011 and 2021.

The locality which recorded the highest level of annual population growth between 2011 and 2021 was Bonnie Doon. The population of Bonnie Doon more than doubled in the 2011 to 2021 period, increasing from 331 residents in 2011 to 771 residents in 2021, or by 8.8% per annum.

Notably, the localities of Daintree, Oak Beach and Rural Balance recorded a decline in the population in the 2011 to 2021 period. The most significant population decrease was within the Daintree locality, whereby the population decreased by 56 residents between 2011 and 2021, or by 4.6% per annum.

Overall, Douglas Shire recorded population growth of 1.1% per annum, increasing from 11,186 residents in 2011 to 12,445 residents in 2021. Over the period, the Port Douglas SA2 contributed to 52.7% of overall population growth within the Douglas Shire local government area (LGA), whilst the Daintree SA2 contributed to 44.4% of population growth. Notably, there are a small proportion of residents who reside within the lower boundary of the Cape York SA2, which slightly falls within Douglas Shire (but a large majority of which is outside the LGA). As such, this assessment has concentrated on the Port Douglas and Daintree SA2s which account for 97.1% of total population growth over the past decade and as of 2021, represented 99.3% of the Shire's population.

Table 2-3 below summarises the historic population of the localities within Douglas Shire in the 2011 to 2021 period, benchmarked to Port Douglas and Daintree SA2s, Douglas Shire and Queensland.

Table 2-3 Historic Population – Localities, Port Douglas SA2, Daintree SA2, Douglas Shire, Queensland, 2011 to 2021

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Average Annual Growth, 2011-21
Localities												
Port Douglas	3,571	3,626	3,721	3,805	3,842	3,945	3,995	3,966	3,968	3,983	4,007	1.2%
Craiglie	1,075	1,105	1,147	1,176	1,229	1,251	1,270	1,288	1,317	1,332	1,333	2.2%
Mossman	2,049	2,075	2,175	2,199	2,218	2,279	2,285	2,257	2,285	2,286	2,269	1.0%
Mossman Gorge	475	483	477	481	485	493	495	488	488	485	480	0.1%
Wangetti	344	352	365	375	383	392	405	407	415	426	437	2.4%
Oak Beach	217	214	213	210	205	203	201	196	191	190	187	-1.5%
Bonnie Doon	331	383	426	478	529	583	625	658	698	736	771	8.8%
Cooya Beach	694	723	724	747	768	794	794	785	784	782	776	1.1%
Newell	472	492	500	521	538	562	565	561	563	565	564	1.8%
Wonga Beach	1,027	1,046	1,077	1,109	1,119	1,102	1,116	1,132	1,128	1,122	1,137	1.0%
Daintree	150	147	141	138	134	132	125	117	110	102	94	-4.6%
Mowbray	344	352	365	375	383	392	405	407	415	426	437	2.4%
Rural Balance	438	431	409	400	390	383	391	395	402	406	409	-0.7%
Benchmark Areas												
Port Douglas SA2	4,963	5,039	5,171	5,277	5,357	5,475	5,549	5,536	5,565	5,600	5,626	1.3%
Daintree SA2	6,175	6,247	6,314	6,380	6,412	6,482	6,580	6,595	6,677	6,710	6,734	0.9%
Douglas Shire	11,186	11,380	11,585	11,757	11,877	12,070	12,210	12,213	12,325	12,394	12,445	1.1%
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%

Note: Some SA1s are included in multiple localities, thus, sum of localities does not equal the Douglas Shire sum.

Source: Australian Bureau of Statistics (ABS), 2022

2.2.2 Components of Population Growth

As a result of COVID-19, persons reconsidered their preferred place of residence, with trends in population growth shifting in a number of regions (e.g., increased internal migration away from cities and into regional areas).

The purpose of this section is to investigate whether population growth throughout Douglas Shire has shifted significantly since COVID-19.

The following components of population growth have been analysed:

- + Net Natural Increase (number of births less deaths);
- + Net Internal Migration (Migration within Australia); and
- + Net Overseas Migration.

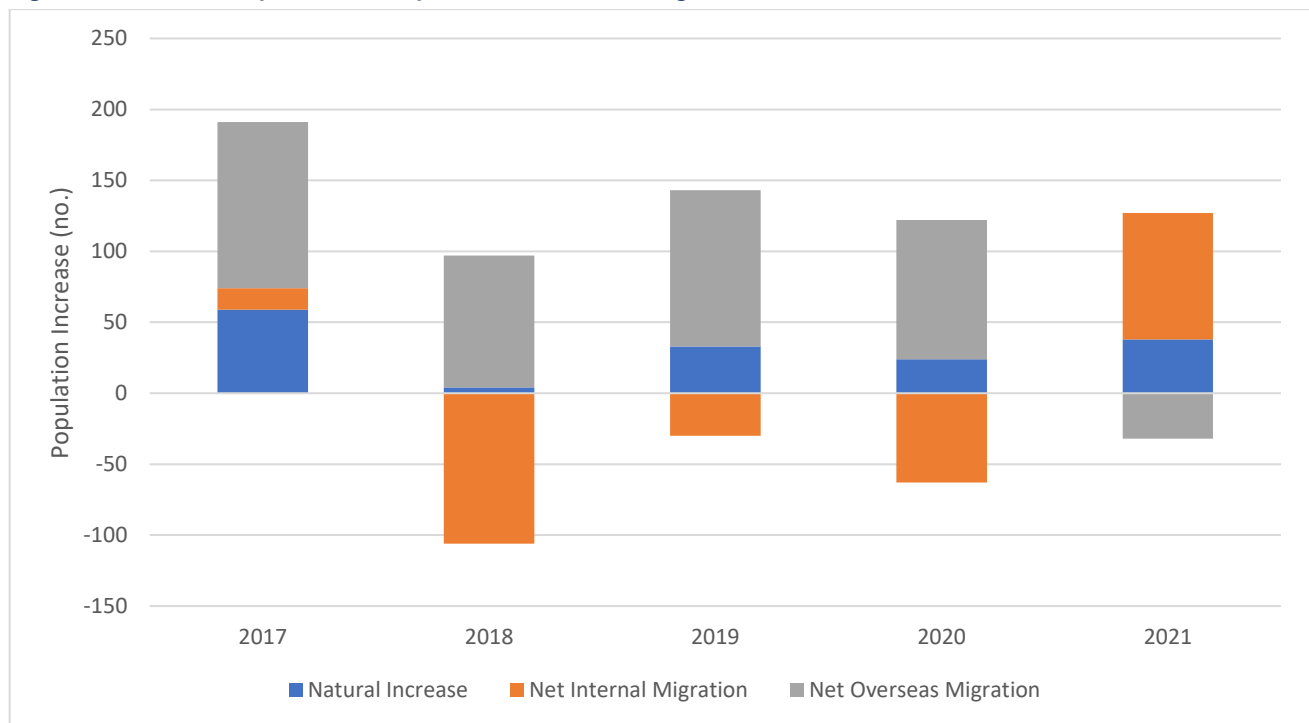
The data recorded by the Australian Bureau of Statistics in relation to the components of population growth is available at the SA2 and LGA level for 2017 to 2021.

Prior to the COVID-19 pandemic, population growth in Douglas Shire was driven by net overseas migration, with net internal migration negative in 2018, 2019 and 2020. Natural increase averaged 30 persons per annum in the 2017 to 2020 period in Douglas Shire, the nature of population growth shifted significantly, with population growth driven primarily by net internal migration, with persons shifting to the region due to lifestyle factors and the ability to be able to work remotely.

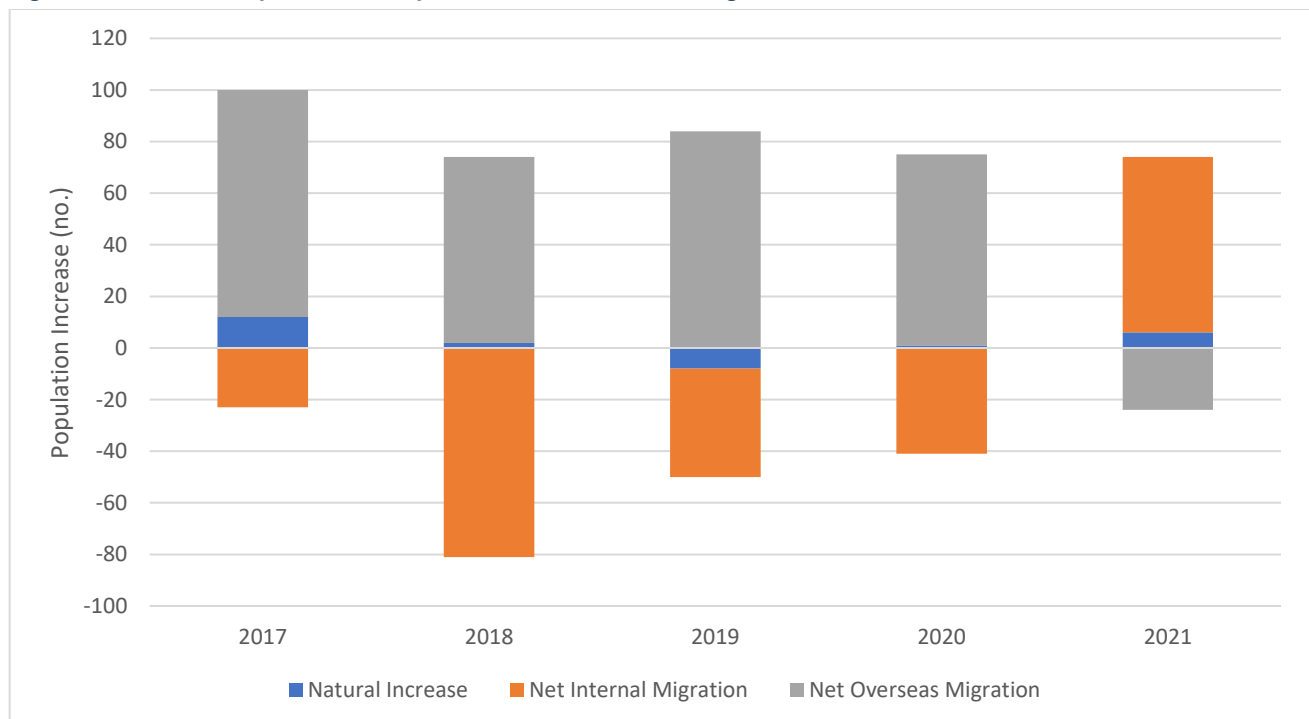
At a sub-regional level, the components of population growth vary considerably, with population growth in Port Douglas SA2 driven primarily by net overseas migration. On the other hand, the population of Daintree SA2 is most reliant on natural increase and to a lesser extent on overseas migration.

In 2021, it was clear that net internal migration to the region was primarily to Port Douglas SA2, as opposed to Daintree SA2. Population growth in Daintree SA2 in 2021 was driven primarily by net natural increase.

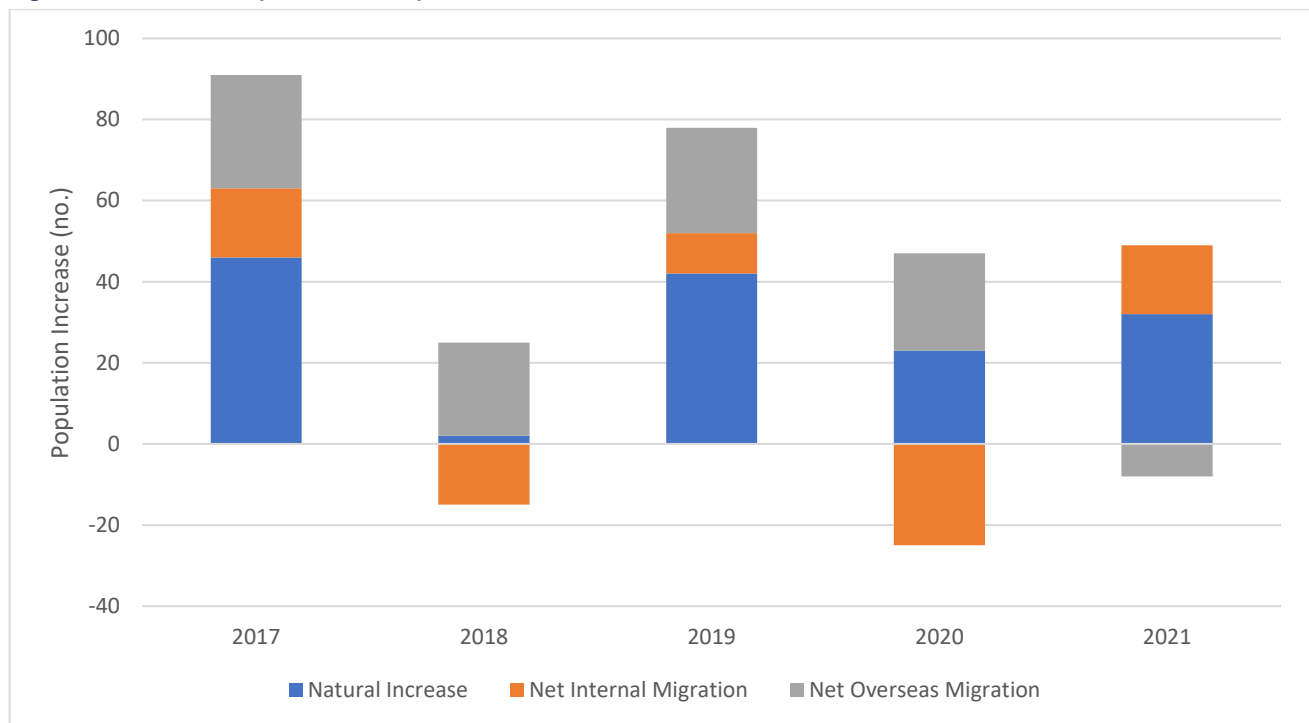
Figures 2-2, 2-3 and 2-4 illustrate the components of population growth in Douglas Shire, Port Douglas SA2 and Daintree SA2 between 2017 and 2021 to illustrate the varying factors driving population growth within the region both prior to and since the COVID-19 pandemic.

Figure 2-2 Components of Population Growth – Douglas Shire, 2017 to 2021


Source: Australian Bureau of Statistics (2022)

Figure 2-3 Components of Population Growth – Port Douglas SA2, 2017 to 2021


Source: Australian Bureau of Statistics (2022)

Figure 2-4 Components of Population Growth – Daintree SA2, 2017 to 2021

Source: Australian Bureau of Statistics (2022)

2.3 Residential Dwelling Approvals

To investigate historic building approvals, data from the Australian Bureau of Statistics has been analysed. A ten-year period has been considered, between the 2012-13 and 2021-22 financial years. The purpose of this section is to provide context to historic population growth and understand the relationship between new dwelling approvals and population growth.

Residential building approvals data from the Australian Bureau of Statistics has been analysed for the following sub-categories:

- + New houses, which includes dwellings that are not attached in some structural way to another dwellings, i.e., separate houses and secondary dwellings/auxiliary units that are not attached to the principal dwelling on the same lot of land; and
- + New other residential building, which includes townhouses, apartments, duplexes, and secondary dwellings that are attached to the principal place of residence.

2.3.1 New House Approvals by SA2

Over the assessment period, there has been a fluctuating trend in the number of new house approvals within the Port Douglas and Daintree SA2 as depicted in Figure 2-5 below. In 2021-22, the number of new house approvals within Douglas Shire was the highest level recorded in the past ten years at 105 approvals, comprising 55 new house approvals in Port Douglas SA2 and 50 new house approvals in Daintree SA2.

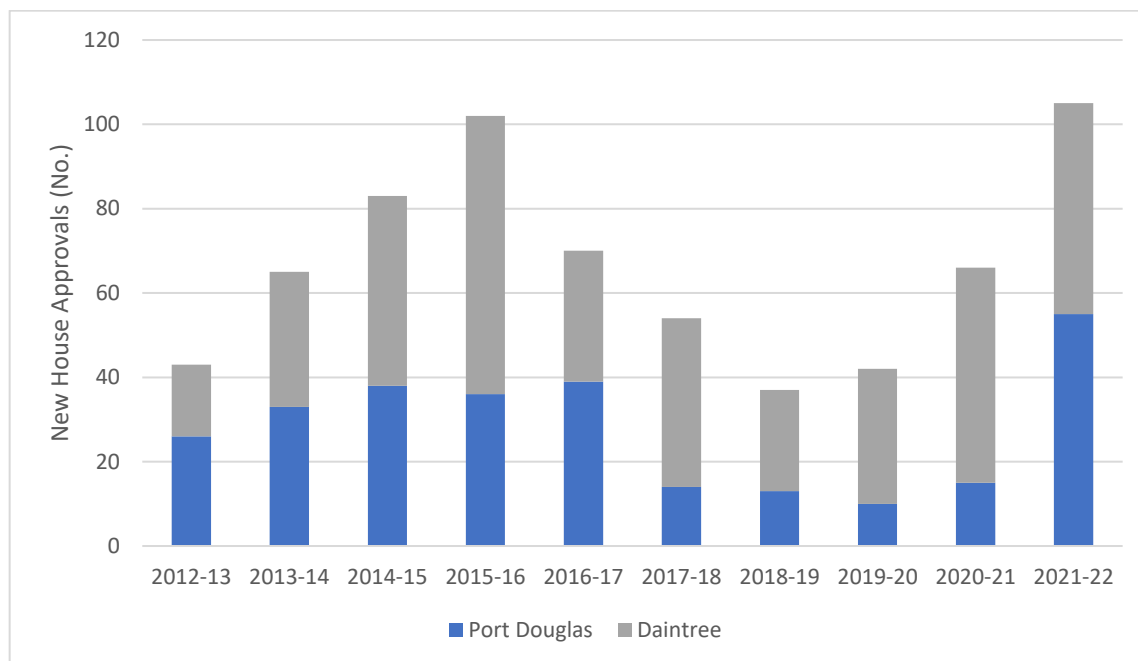
Over the past ten years, the number of new house approvals averaged 64 new house approvals per annum in Douglas Shire, comprising:

- + 26 new house approvals per annum in Port Douglas SA2; and
- + 38 new house approvals per annum in Daintree SA2.

In the most recent year, new house approvals were at historic highs in Port Douglas SA2 and above longer term averages in Daintree SA2. This uplift in new house approvals in Port Douglas SA2 was likely fuelled by the COVID-19 pandemic, whereas the uplift in new house approvals in Daintree SA2 appears more reflective of increased demand for houses by existing residents with Douglas Shire.

Figure 2-5 displays the total number of new house approvals within Port Douglas and Daintree SA2s between 2012-13 and 2021-22.

Figure 2-5 Residential Building Approvals – New Houses, Port Douglas SA2 and Daintree SA2, 2012-13 to 2021-22



Source: Australian Bureau of Statistics (ABS), 2022

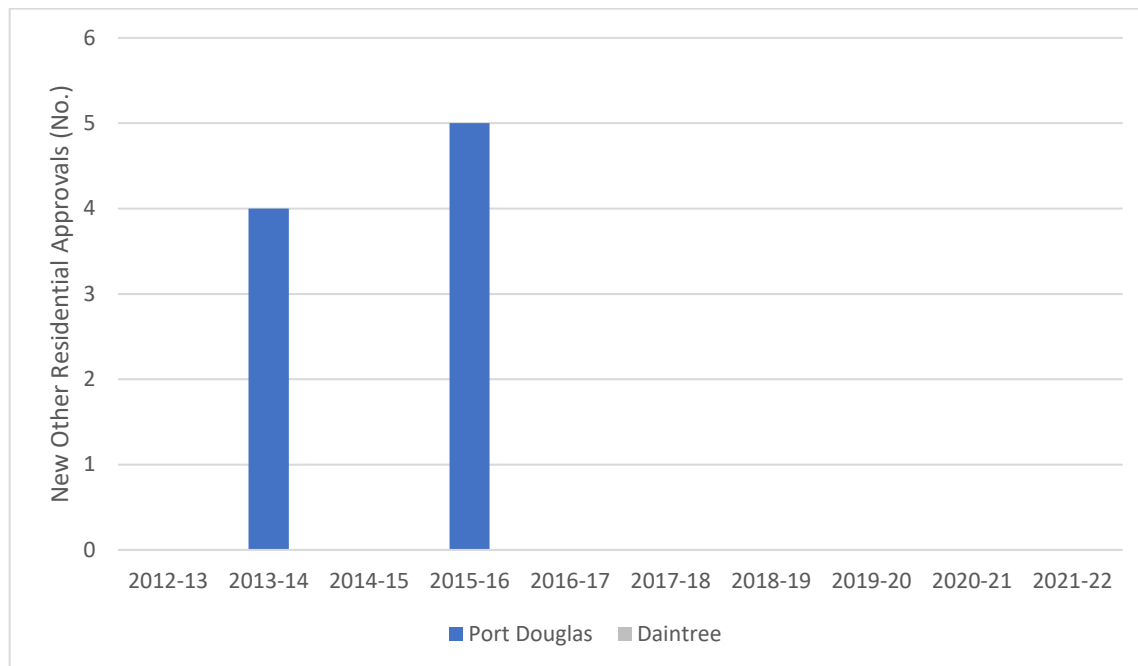
2.3.2 New Other Residential Approvals by SA2

Over the past ten years, there was relatively little activity in the attached dwelling market in terms of approvals. In the past ten years, there were only nine other residential approvals identified in Douglas Shire, comprising four approvals in 2013-14 and five approvals in 2015-16. All new other residential approvals were within Port Douglas SA2.

This indicates there has been little diversity in dwellings delivered in Douglas Shire over the past ten years, with additional dwellings almost exclusively detached dwellings.

Figure 2-6 illustrates the number of new other residential approvals with Douglas Shire between 2012-13 and 2021-22.

Figure 2-6 Residential Building Approvals – New Other Residential Approvals, Port Douglas SA2 and Daintree SA2, 2012-13 to 2021-22



Source: Australian Bureau of Statistics (ABS), 2022

2.4 Property Market Overview

The purpose of this section is to obtain an understanding of the residential property market within Douglas Shire, including a breakdown by suburb. The assessment has considered the following local property market indicators:

- + Volume, value, and median sale price for detached and detached dwellings within Douglas Shire for the past ten years;
- + Volume, value, and median price per square metre of vacant residential land within Douglas Shire for the past ten years;
- + Residential vacancies for the past five years (both the quantum of vacancies and residential vacancy rates); and
- + Median weekly rents by property type.

2.4.1 Detached Dwellings

This section of the report has considered the detached dwelling market within Douglas Shire suburbs for the past ten years. The assessment has been undertaken through the extraction of property market data from the PriceFinder database. The analysis has presented transactions for 32 suburbs. The summarised data is presented in the following sections.

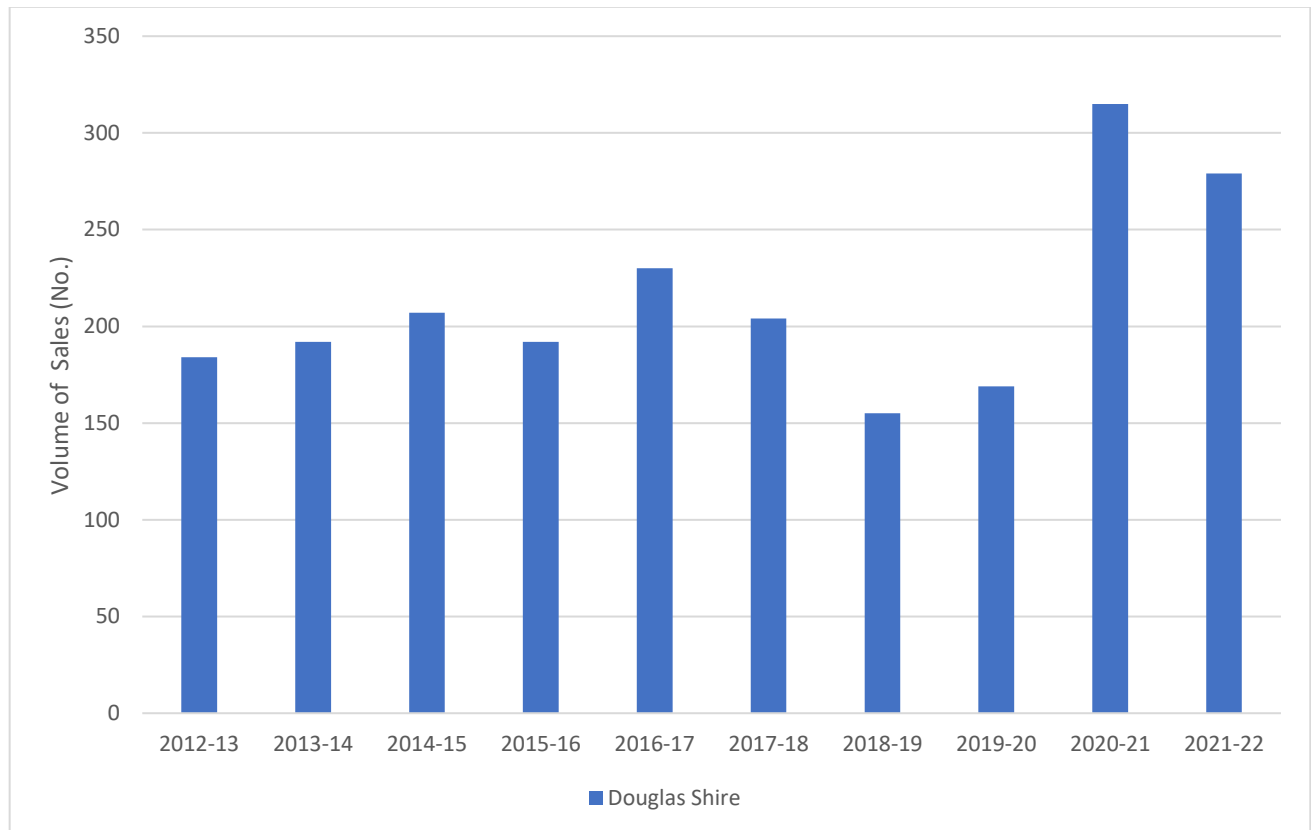
2.4.1.1 Volume of Sales

Over the past ten years, there has been 2,127 detached dwelling sales in Douglas Shire. The number of detached dwelling sales peaked in 2020-21 at 315 sales. Over this time period, the volume of sales was highest for Port Douglas, followed by Mossman, and Craiglie, each averaging 46, 29, and 20 sales per annum respectively. Sales for Port Douglas and Craiglie peaked in 2020-21, at 60 sales and 30 sales respectively, whilst sales in Mossman peaked in 2021-22 at 40 detached dwelling sales.

Notably, Wonga Beach has recorded an increasing incidence of sales since 2016, recording 39 sales in 2022.

Figure 2-5 below summarises the trend in the volume of detached dwelling sales in Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-1 provides a summary of the volume of sales by suburb between the same period.

Figure 2-7 Volume of Detached Dwelling Sales, Douglas Shire, 2012-13 to 2021-22



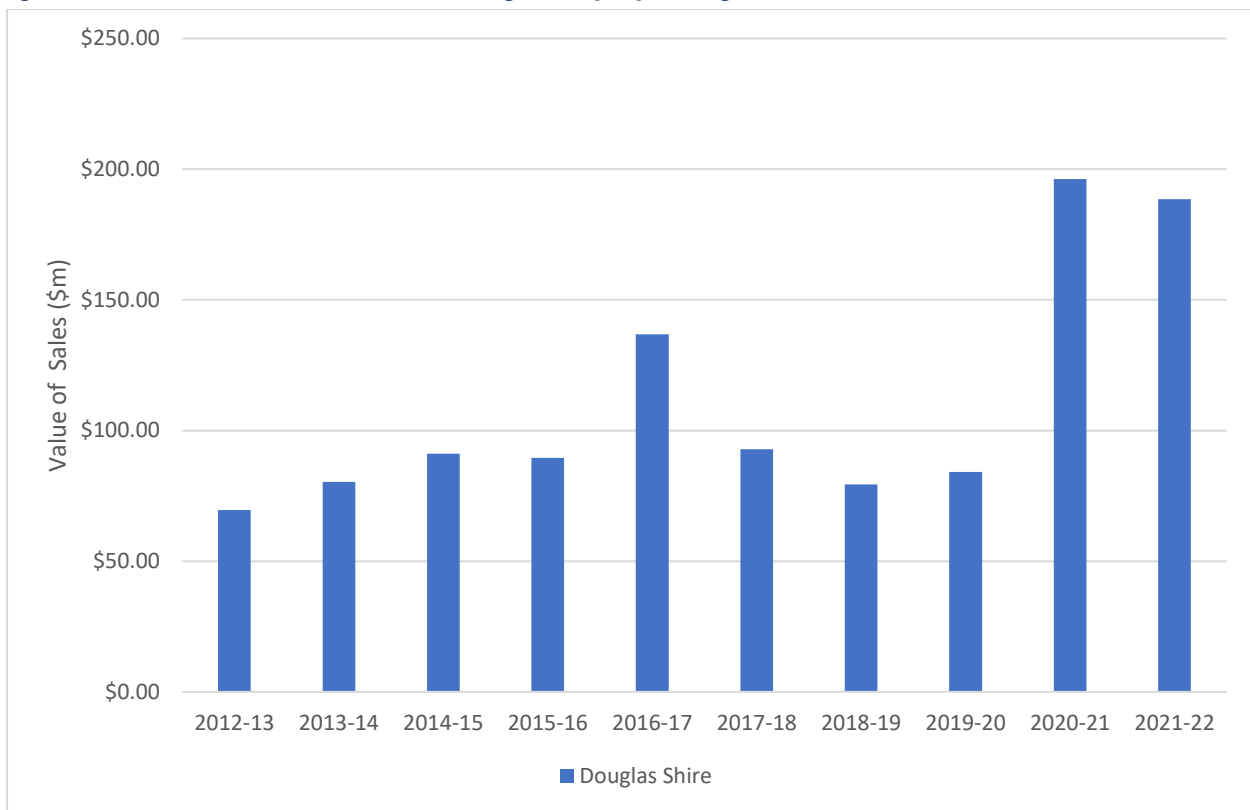
Source: PriceFinder (2022)

2.4.1.2 Value of Sales

Over the past ten years, the average annual value of detached dwelling sales within Douglas Shire was \$110.51 million, whereby sales peaked in 2020-21 at \$195.18 million. The average annual value of sales for detached dwellings was highest for the following suburbs:

- + Port Douglas: \$38.13 million per annum;
- + Craiglie: \$11.58 million per annum;
- + Wonga Beach: \$6.27 million per annum;
- + Cooya Beach: \$4.29 million per annum; and
- + Oak Beach: \$4.14 million per annum.

Figure 2-6 below summarises the trend in the value for detached dwelling sales in Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-2 provides a summary of the value of detached sales by suburb between the same period.

Figure 2-8 Value of Detached Dwelling Sales (\$m) – Douglas Shire, 2012-13 to 2021-22


Source: PriceFinder (2022)

2.4.1.3 Median Sale Price

In 2021-22, the median sale price for detached dwellings within Douglas Shire was \$570,000, with significant price growth recorded in the most recent year. The median sale price for detached dwellings in Douglas Shire has recorded an upward trajectory over the past decade, with price growth particularly high within 2021-22.

Of the suburbs analysed, the median sale price in the latest financial year (2021-22) was highest in Mowbray at \$1.1 million. However, there were only 9 detached dwelling sales in Mowbray in 2021-22, with the average property size being 13,154 square metres and rural residential in nature. Moreover, the subsequent highest median sale prices in 2021-22 (over \$0.8 million) were recorded in Killaloe, Port Douglas, Shannonvale and Mossman Gorge. Besides the Port Douglas suburb, the number of sales recorded in these suburbs were less than five and the sales were for rural residential detached dwellings.

The median sale price in 2021-22 for the suburbs driving detached dwelling sales volumes were as follows:

- + Port Douglas: median sale price of \$858,500 in 2021-22;
- + Craiglie: median sale price of \$637,500 in 2021-22;
- + Mossman: median sale price of \$360,000 in 2021-22; and
- + Wonga Beach: median sale price of \$390,000 in 2021-22.

Of these four suburbs identified, Port Douglas recorded the highest rate of median sales price growth over the past ten years, increasing at an average annual rate of 7.4%. Median sales price growth in

both Craiglie (5.5% per annum) and Mossman (4.8% per annum) was below the Douglas Shire average (5.7% per annum)¹.

Table 2-4 below summarises the median sale price for detached dwellings in Douglas Shire over the past ten years. Appendix A Table 9-3 provides a summary of the median sale price by suburb between the same period.

Table 2-4 Median Sale Price for Detached Dwellings – Douglas Shire, 2012-13 to 2021-22

Year	Douglas Shire
2012-13	\$345,000
2013-14	\$382,500
2014-15	\$380,000
2015-16	\$402,500
2016-17	\$410,000
2017-18	\$420,000
2018-19	\$430,500
2019-20	\$420,000
2020-21	\$467,000
2021-22	\$570,000

Source: PriceFinder (2022)

2.4.2 Attached Dwellings

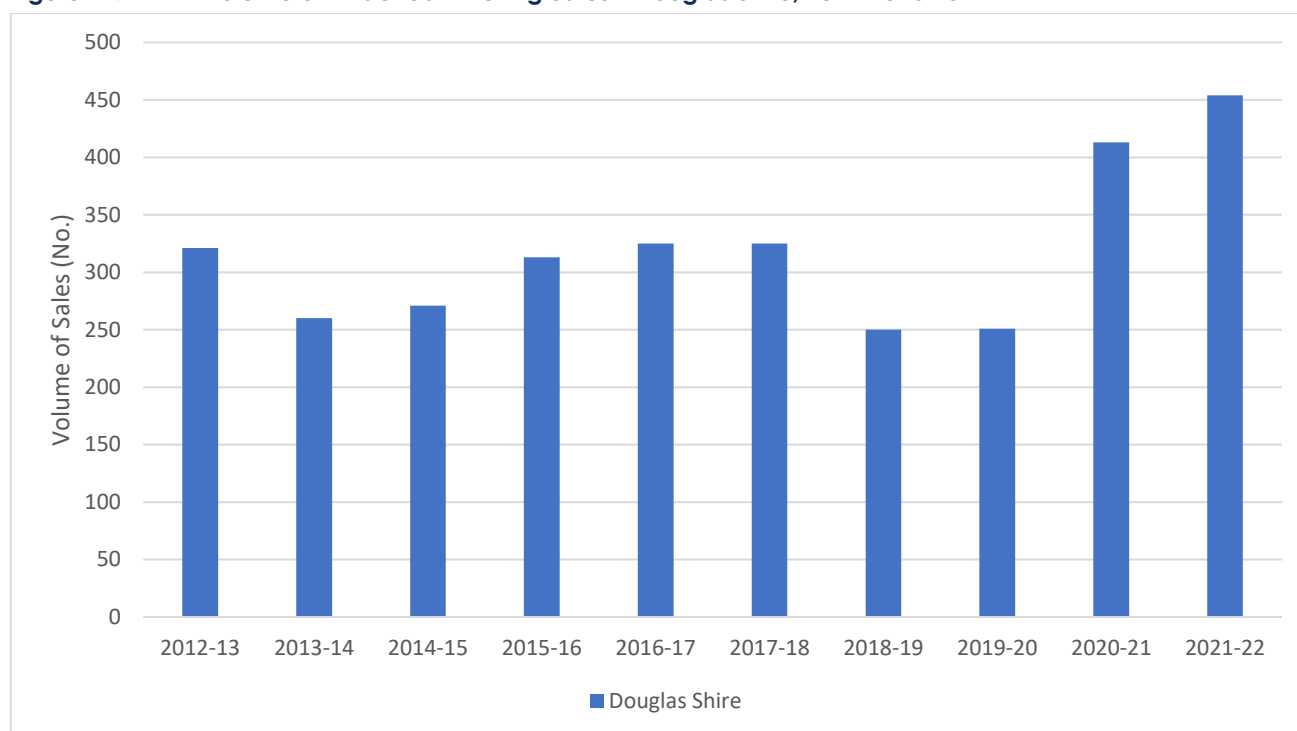
This section of the report presents an overview of sales transactions within the attached dwelling market in Douglas Shire over the past ten years. Consistent with the analysis undertaken in the preceding section, the assessment has been undertaken through the extraction of property market data from the PriceFinder database.

2.4.2.1 Volume of Sales

Between 2012-13 and 2021-22, there were an average of 318 attached dwelling sales per annum in Douglas Shire. The number of attached dwelling sales increased from 321 sales in 2012-13 to 454 sales in 2021-22. Over the past ten years, the volume of sales was highest in Port Douglas, with an average of 290 sales per annum. Consistent with Douglas Shire, sales peaked in Port Douglas in 2021-22 at 411 sales. Craiglie and Mossman recorded the second and third highest volume of attached dwelling sales within Douglas Shire, with each suburb averaging 22 and 3 sales per annum respectively. Similar to Douglas Shire, sales with Mossman peaked in 2021-22 at 9 sales, whilst sales within Craiglie peaked in 2015-16 at 34 sales. As such, it is evident that majority of attached dwelling sales were in Port Douglas and to a lesser extent, in Craiglie and Mossman, which is consistent with the land zoning for attached dwelling development in Douglas Shire.

Figure 2-7 below summarises the trend in the volume of attached dwelling sales in Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-4 provides a summary of the volume of sales by suburb between the same period.

¹ There was no median sales price data available for houses in Wonga Beach in 2012-13

Figure 2-9 Volume of Attached Dwelling Sales – Douglas Shire, 2012-13 to 2021-22


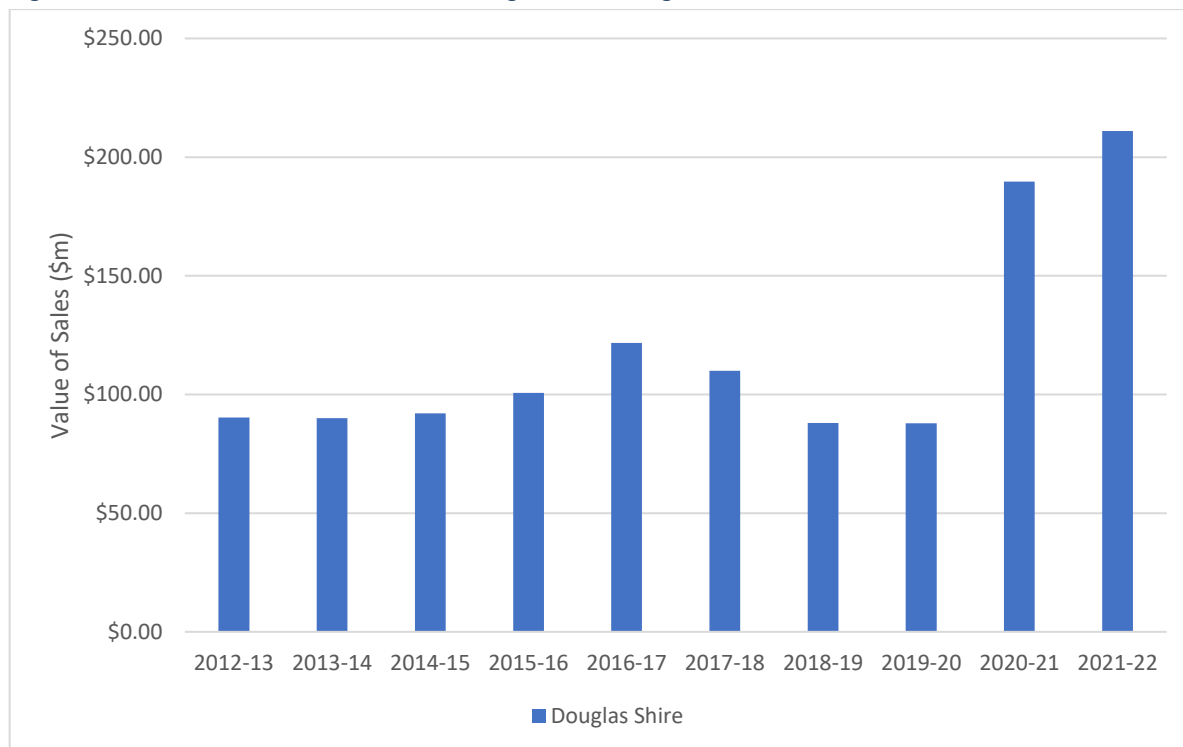
Source: PriceFinder (2022)

2.4.2.2 Value of Sales

Over the past ten years, the average value of attached dwelling sales within Douglas Shire was \$118.13 million per annum, with a peak of \$211.01 million in 2021-22. Overall, the total value of attached sales within Douglas Shire increased from \$90.23 million in 2012-13 to \$211.01 million in 2021-22. The average annual value of sales for attached dwellings over the past decade was highest in the following suburbs:

- + Port Douglas: \$110.18 million per annum;
- + Craiglie: \$6.21 million per annum;
- + Mossman: \$0.56 million per annum; and
- + Newell: \$0.25 million per annum.

Figure 2-8 below summarises the trend in the value of attached dwelling sales within Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-5 provides a summary of the value of sales by suburb between the same period.

Figure 2-10 Value of Attached Dwelling Sales – Douglas Shire, 2012-12 to 2021-22


Source: PriceFinder (2022)

2.4.2.3 Median Sale Price

In the most recent financial year (2021-22), the median sales price for attached dwellings within Douglas Shire was \$305,000, representing an increase of \$20,000 from the previous year (median sale price of \$285,000 in 2020-21), consistent with the trends in the detached dwelling market.

The median sale price in 2021-22 was highest for the following suburbs:

- + Wonga Beach: median sale price of \$345,000 in 2021-22;
- + Port Douglas: median sale price of \$317,500 in 2021-22;
- + Cooya Beach: median sale price of \$286,000 in 2021-22; and
- + Craiglie: median sale price of \$235,000 in 2021-22.

Wonga Beach recorded the highest rate of growth in the median sale price between 2012-13 and 2021-22, increasing at an average annual rate of 7.6%, above the Douglas Shire average (5.1% per annum).

Table 2-5 below summarises the median sale price for attached dwellings in Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-6 provides a summary of the median sale price by suburb between the same period.

Table 2-5 Median Sale Price for Attached Dwelling Sales – Douglas Shire, 2012-13 to 2021-22

Year	Douglas Shire
2012-13	\$195,000
2013-14	\$241,000
2014-15	\$234,000
2015-16	\$220,000
2016-17	\$251,000
2017-18	\$225,000
2018-19	\$236,000
2019-20	\$255,000
2020-21	\$285,000
2021-22	\$305,000

Source: PriceFinder (2022)

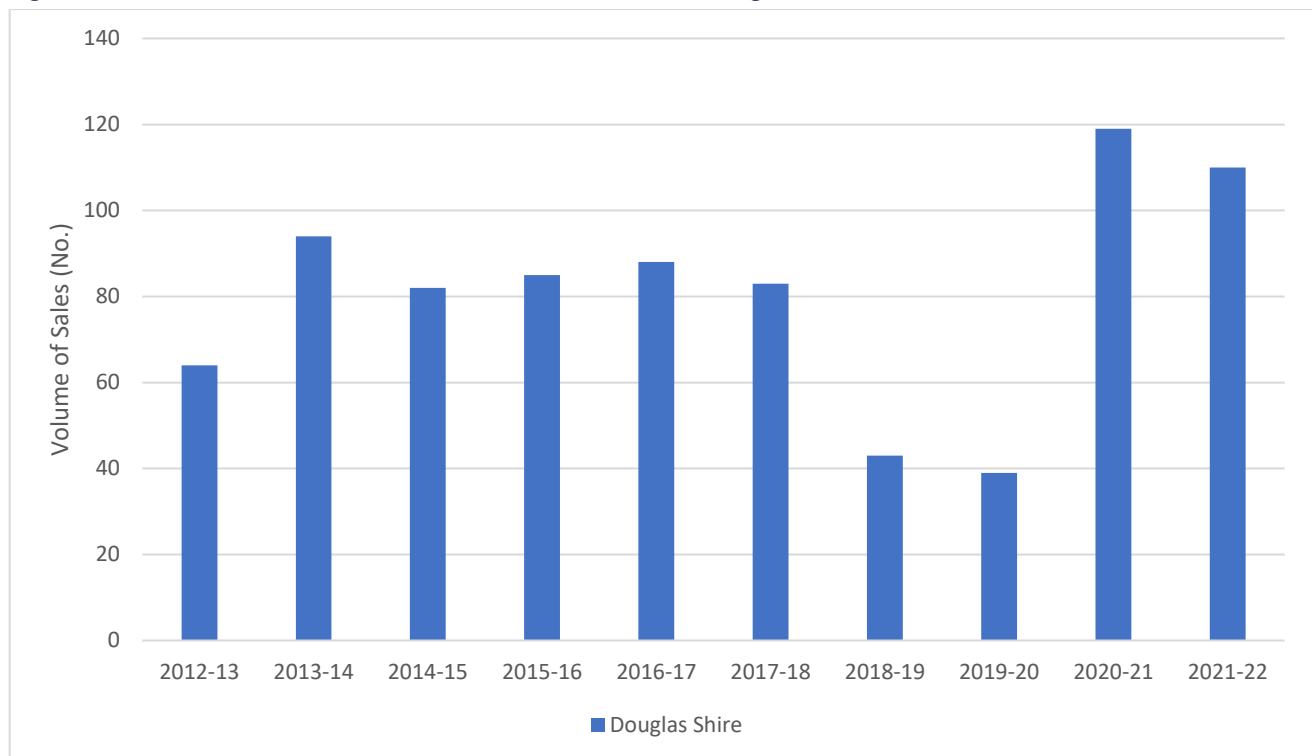
2.4.3 Vacant Residential Land

This section of the report provides an overview of sales transactions within the vacant residential land market in Douglas Shire for the past ten years. Consistent with the analysis undertaken in the preceding section, the assessment has been undertaken through the extraction of property market data from the PriceFinder database.

2.4.3.1 Volume of Sales

Between 2012-13 and 2021-22, there were an average of 81 vacant residential land sales per annum in Douglas Shire. Overall, the number of vacant residential land sales in Douglas Shire increased from 64 sales in 2012-13 to 111 sales in 2021-22, peaking at 123 sales in 2020-21. Over the past ten years, the volume of sales was highest in Bonnie Doon with 154 vacant residential land sales over the period. Unlike Douglas Shire, sales within Bonnie Doon peaked in 2013-14 at 24 sales. Craiglie and Wonga Beach also recorded strong sales volumes, each averaging 15 and 9 sales per annum. Sales for Craiglie peaked in 2016-17 at 25 sales, whereas sales within Wonga Beach peaked in 2020-21 at 17 sales.

Figure 2-9 below summaries the trend in the volume of vacant residential land sales in Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-7 provides a summary of the volume of sales by suburb between the same period.

Figure 2-11 Volume of Vacant Residential Land Sales – Douglas Shire, 2012-13 to 2021-22

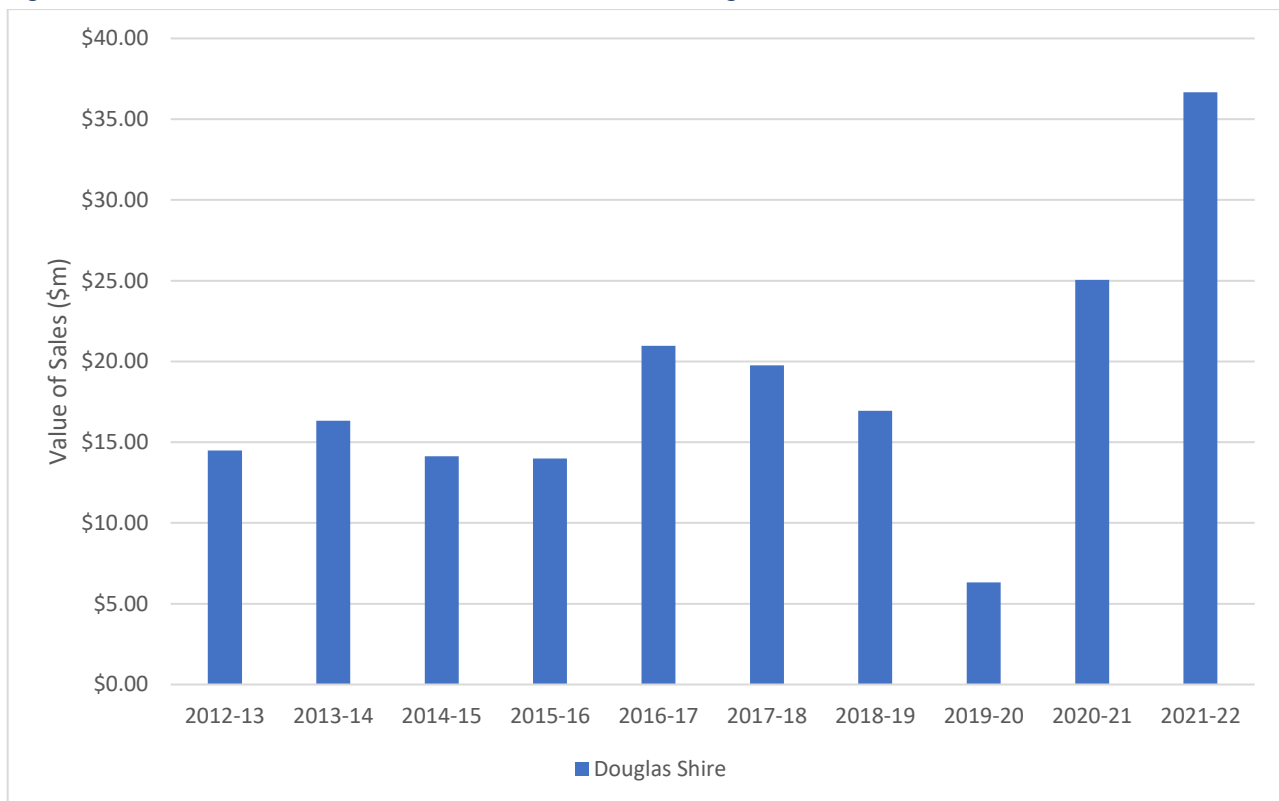
Source: PriceFinder (2022)

2.4.3.2 Value of Sales

Over the past ten years, the average annual value of vacant residential land sales within Douglas Shire was \$18.47 million per annum, with a peak of \$36.67 million in 2021-22. Overall, the total value of vacant residential land sales within Douglas Shire increased from \$14.48 million 2012-13 to \$36.67 million 2021-22. The average annual value of sales was highest for the following suburbs:

- + Port Douglas: \$5.16 million per annum;
- + Craiglie: \$3.88 million per annum;
- + Bonnie Doon: \$2.07 million per annum;
- + Wonga Beach: \$1.16 million per annum; and
- + Mossman: \$1.11 million per annum.

Figure 2-10 below summarises the trend in the value of vacant residential land sales within Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-8 provides a summary of the value of sales by suburb between the same period.

Figure 2-12 Value of Vacant Residential Land Sales – Douglas Shire, 2012-13 to 2021-22


Source: PriceFinder (2022)

2.4.3.3 Median Sale Price per Square Metre

In the most recent financial year (2021-22), the median price per square metre for vacant residential land within Douglas Shire was \$141.98, representing a slight decrease in price from the previous year (median price per square metre of \$179.57 in 2020-21), consistent with the trend observed in the volume of vacant residential land sales within Douglas Shire.

The median price per square metre of vacant residential land in 2021-22 was highest for the following suburbs:

- + Port Douglas: median price per square metre of \$1,000.00 in 2021-22;
- + Oak Beach: median price per square metre of \$757.83 in 2021-22;
- + Craiglie: median price per square metre of \$368.00 in 2021-22; and
- + Bonnie Doon: median price per square metre of \$266.43 in 2021-22.

Growth in the median sale price per square metre was particularly high in Port Douglas and Bonnie Doon over the past ten years, averaging 13.3% and 9.9% per annum in the 2012-13 to 2021-22 period.

Table 2-6 below summarises the median price per square metre for vacant residential land in Douglas Shire between 2012-13 and 2021-22. Appendix A Table 9-9 provides a summary of the median sale price per square metre by suburb between the same period.

Table 2-6 Median Price per Square Metre – Douglas Shire, 2012-13 to 2021-22

Year	Douglas Shire
2012-13	\$116.22
2013-14	\$121.79
2014-15	\$122.90

Year	Douglas Shire
2015-16	\$157.11
2016-17	\$147.17
2017-18	\$110.60
2018-19	\$67.15
2019-20	\$19.55
2020-21	\$179.57
2021-22	\$141.98

Note: The low price per square metre values in 2018-19 and 2019-20 is due to large rural lot sales in suburbs such as Mowbray, Forest Creek, Degarra and Diwan.
 Source: PriceFinder (2022)

2.4.3.4 Median Allotment Size

The median allotment size for vacant residential land in Douglas Shire between 2012-13 and 2021-22 was 1,000 square metres. The largest median allotment size was in Miallo, whereby the median lot size for vacant residential land across the period was 125,265 square metres. Notably, this large median lot size was a result of only two relevant sales occurring in Miallo over the last decade. All suburbs of rural nature, such as, Miallo, Stewart Creek Valley and Degarra recorded median allotment sizes larger than suburban suburbs such as Wonga Beach and Craiglie. In 2021-22, the smallest median allotment size for residential land was recorded in Oak Beach (median allotment size of 607 square metres), followed by Craiglie (median allotment size of 625 square metres) and Bonnie Doon (median allotment size of 691 square metres).

Table 2-7 below summarises the median allotment size for vacant residential land within Douglas Shire across 2012-13 and 2021-22.

Table 2-7 Median Allotment Size (sqm) – Douglas Shire

	Median Allotment Size
Daintree	2,023
Wonga Beach	931
Mossman	923
Diwan	13,800
Craiglie	701
Degarra	81,050
Stewart Creek Valley	66,245
Bonnie Doon	756
Miallo	125,265
Oak Beach	2,578
Bamboo	4,732
Cow Bay	10,040
Port Douglas	1,001
Rocky Point	10,000
Forest Creek	20,300
Mowbray	29,875
Kimberley	10,940
Lower Daintree	5,663
Newell	705
Cape Tribulation	23,060
Cooya Beach	871

	Median Allotment Size
Whyanbeel	17,370
Finlayvale	31,800
Mossman Gorge	1,746
Shannonvale	8,122
Thornton Beach	1,008
Wangetti	2,008
Killaloe	8,583
Cassowary	2,599
Wonga	932
Douglas Shire	1,000

Note: The large median lot sizes in suburbs such as Miallo, Degarra, Mowbray and Finlayvale are due to the sale of large parcels of rural land between 2012-13 and 2021-22.

Source: PriceFinder (2022)

2.4.4 Residential Vacancy Rates

Residential vacancy rate data is published monthly by SQM Research at the postcode level. The postcodes of relevance in Douglas Shire are 4877 (which is herein referred to Port Douglas / Craiglie) and 4873 (which is herein referred to as Mossman and surrounds).

The analysis has benchmarked vacancy rates within Douglas to Cairns (postcode 4870), Townsville (4810) and Yeppoon (postcode 4703).

A residential vacancy rate in the order of 2% to 3% represents a relatively balanced market, with the market evenly balanced between landlords and renters.

Prior to COVID-19, residential vacancy rates in Mossman and surrounds were typically in the 2-3% range since late 2012, whereas residential vacancy rates in Port Douglas / Craiglie were more volatile and typically highest in the December and March Quarter of each year. Since COVID-19, residential vacancy rates in Mossman and surrounds were persistently below 2% since the June Quarter 2020, reaching close to 0% in early 2022. Whilst vacancy rates have started to increase in the second half of 2022, these levels remain well below a balanced market.

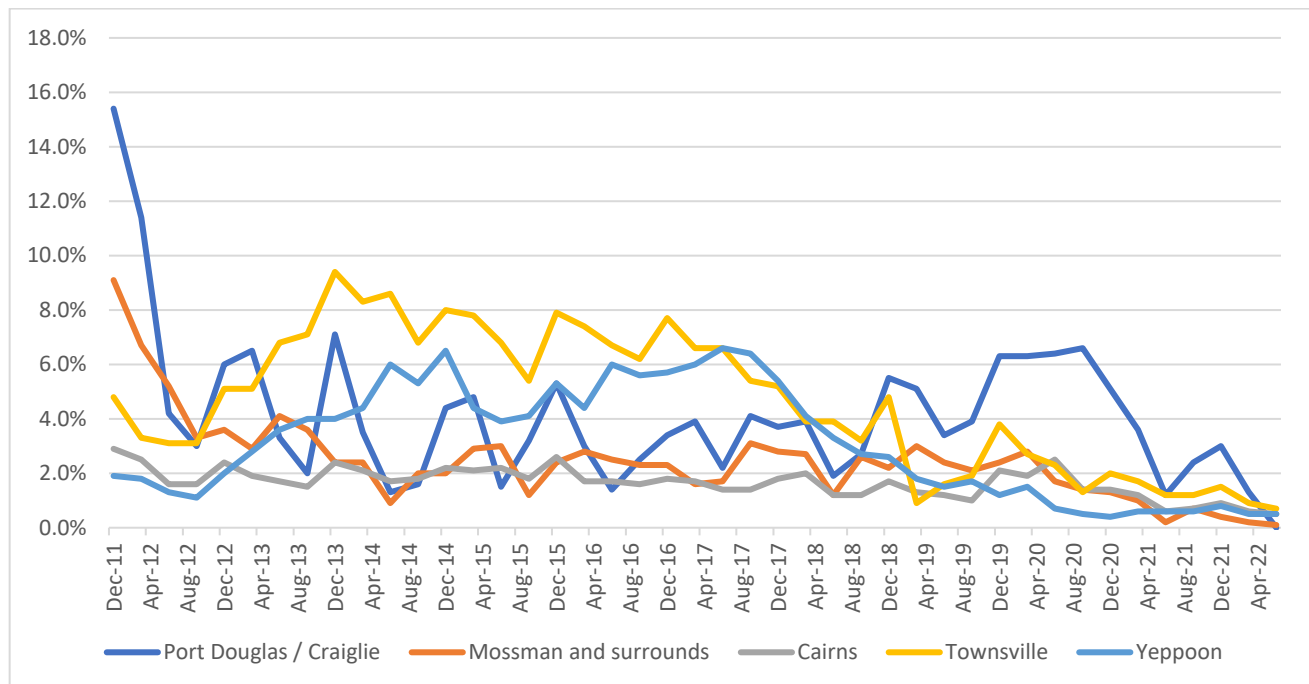
In Port Douglas / Craiglie, residential vacancy rates increased in both June and September 2020, with overseas workers returning to their country of origin and freeing up rental properties. However, residential vacancy rates were persistently below 2% in 2022 in Port Douglas / Craiglie, likely reflective of persons looking for properties in Mossman and surrounds ultimately finding a suitable rental in Port Douglas / Craiglie.

In the comparator markets analysed, all regions recorded a tightening in residential vacancy rates, with Cairns recording persistently low residential vacancy rates (below 3%) since mid 2012. The Yeppoon rental market was also recording residential vacancy rates below 2% from early 2019, prior to the COVID-19 pandemic. This indicated that both Cairns and Yeppoon were already facing rental shortages prior to COVID-19. The comparator regions have seen increasing in residential vacancy rates in late 2022, but vacancy rates remain persistently low (below 1.2% in all markets except for Townsville).

This data indicates that low residential vacancy rates since COVID-19 was not unique to Douglas Shire and presented challenges through coastal Queensland.

Figure 2-11 illustrates the residential vacancy rates for the postcodes of Port Douglas / Craiglie and Mossman and surrounds, benchmarked to the postcodes for Cairns, Townsville and Yeppoon between December 2011 and December 2022.

Figure 2-13 Residential Vacancy Rates – Port Douglas, Daintree, Cairns, Townsville and Yeppoon, December 2011 to December 2022



Source: SQM Research (2022)

2.4.5 Median Weekly Rents

The Residential Tenancies Authority (RTA) publishes quarterly data regarding median weekly rents at the postcode level. The postcodes of relevance in Douglas Shire are 4877 (which is herein referred to as Port Douglas / Craiglie) and 4873 (which is herein referred to as Mossman and surrounds).

The analysis has focussed on median weekly rents for the following property types:

- + 2 bedroom flats/units;
- + 3 bedroom townhouses; and
- + 3 bedroom houses.

In the December Quarter 2022, median weekly rents by property type were as follows:

- + 2 bedroom flats/units: \$280/week in Mossman and surrounds, \$450/week in Port Douglas/Craiglie;
- + 3 bedroom townhouses: \$675/week in Port Douglas/Craiglie; and
- + 3 bedroom houses: \$505/week in Mossman and surrounds, \$750/week in Port Douglas/Craiglie.

Whilst median weekly rent growth for all property types has typically outpaced inflation in Douglas Shire over the past ten years, the rate of growth in median weekly rents has accelerated since COVID-19, with median weekly rents in the past year increasing by at least 25%, except for two bedroom flats in Mossman and surrounds (this result is likely skewed by the relatively few rental bonds placed for this property type).

This has placed significant upward pressure on rental affordability for residents in Douglas Shire, which is likely to have led to residents moving down the housing continuum and renting a lower quality or smaller dwelling, likely further away from their preferred place of residence.

The rate of rental growth has typically been higher for townhouses and houses, as opposed to flats/units.

Table 2-8 below summarises the one year, three year, five year and ten year average annual growth in median weekly rents.

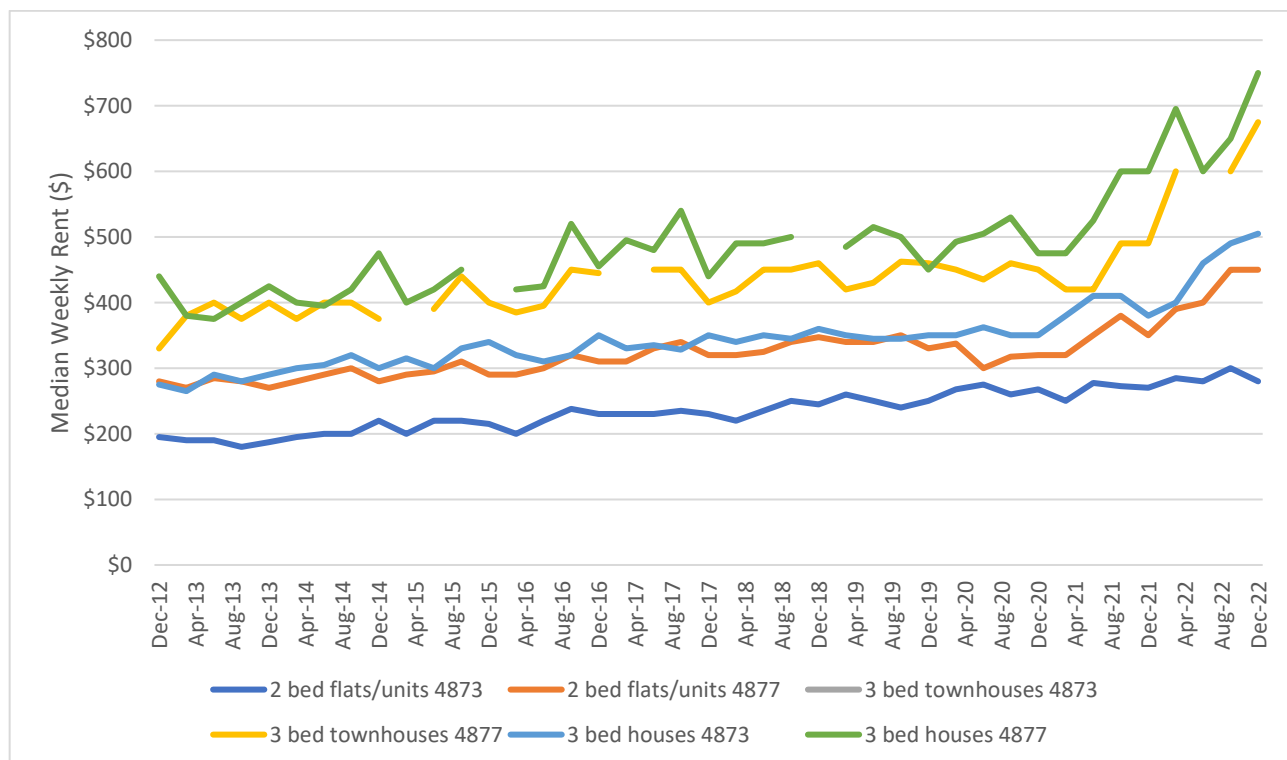
Table 2-8 Average Annual Growth in Median Weekly Rents by Property Type, Dec Q 12 to Dec Q 22

Year	Two Bedroom Flats / Units		Three Bedroom Townhouses		Three Bedroom Houses	
	Mossman and Surrounds	Port Douglas / Craiglie	Mossman and Surrounds	Port Douglas / Craiglie	Mossman and Surrounds	Port Douglas / Craiglie
One Year (Dec Q 21-Dec Q 22)	3.7%	28.6%	-	37.8%	32.9%	25.0%
Three Year (Dec Q 19 – Dec Q 22)	3.8%	10.9%	-	13.6%	13.0%	18.6%
Five Year (Dec Q 17 – Dec Q 22)	4.0%	7.1%	-	11.0%	7.6%	11.3%
Ten Year (Dec Q 12 – Dec Q 22)	3.7%	4.9%	-	7.4%	6.3%	5.5%

Source: Residential Tenancies Authority (RTA), (2022)

Figure 2-12 below illustrates growth in the median weekly rents for properties within Mossman and surrounds and Port Douglas / Craiglie between December Quarter 2012 and December Quarter 2022.

Figure 2-14 Median Weekly Rent by Property Type and Postcode, December Quarter 2012 to December Quarter 2022



Source: Residential Tenancies Authority (RTA), (2022)

2.5 Unoccupied Private Dwellings

The analysis has considered the number of unoccupied private dwellings as of the 2011, 2016 and 2021 Census to understand whether there have been significant shifts in the number of dwellings or proportion of housing stock being used for short term accommodation. Whilst this is not representative of a perfect measure of the scale of dwellings being used for short term accommodation, it provides insight into whether this is potentially becoming an increasing issue within a local government area over time. Within Port Douglas SA2, the number of unoccupied private dwellings has increased from 443 dwellings in 2011 to 528 dwellings in 2021, or from 14.9% of total dwellings in 2011 to 15.4% of total dwellings in 2021. On the other hand, the number of unoccupied private dwellings in the Daintree SA2 decreased by 53 dwellings between 2011 and 2016, before increasing by 46 dwellings between 2016 and 2021. Overall, the number of unoccupied private dwellings in the Daintree SA2 decreased from 15.0% of total dwellings in 2011 to 13.5% of total dwellings in 2021.

Overall, the data suggests an increasing number of dwellings in Port Douglas SA2 are being used for short term accommodation, whereas in Daintree SA2 the trend is less clear.

Table 2-8 displays the number and proportion of unoccupied private dwellings in the Port Douglas SA2, Daintree SA2, and Douglas Shire between 2011 and 2016.

Table 2-9 Unoccupied Private Dwellings – Port Douglas SA2, Daintree SA2, and Douglas Shire, 2021

	2011		2016		2021	
	Number	Proportion (%)	Number	Proportion (%)	Number	Proportion (%)
Port Douglas SA2	443	14.8%	472	14.8%	528	15.4%
Daintree SA2	479	15.0%	426	12.8%	473	13.5%
Douglas Shire	-	-	902	13.7%	1,005	14.4%

Note: Douglas Shire was reinstated separate from Cairns Regional Council on the 1st January 2014.

Source: ABS Census of Population and Housing (2021)

2.6 Mortgage & Rental Stress

Mortgage stress is defined as households whereby mortgage payments equate to more than 30% of household income, with rental stress referring to households whereby rent payments are more than 30% of household income.

The data clearly highlights that rental stress is the key issue facing both regional Queensland coastal Councils and Queensland, with the issue particularly pronounced in Douglas Shire and its component SA2s. In 2021, over two in five rental households faced rental stress. The incidence of rental stress post 2021 Census has likely only increased, with increases in median weekly rent typically outpacing wage growth.

Douglas Shire is also characterised by a relatively high proportion of households in mortgage stress relative to regional and state averages. Growth in the proportion of households facing mortgage stress post 2021 Census is less clear and is influenced by the proportion of households with fixed and variable mortgages (data is not available regarding this at the small area level).

Table 2-9 displays the number and proportion of households recording mortgage and rental stress within Douglas Shire and its component SA2s, benchmarked coastal regions and Queensland as of the 2021 Census.

Table 2-10 Mortgage and Rental Stress – Port Douglas SA2, Daintree SA2, Douglas Shire, Cairns Regional Council, Townsville City Council, Livingstone Shire Council, Queensland, 2021

	Mortgage Stress		Rental Stress	
	Number	Proportion (%)	Number	Proportion (%)
Port Douglas SA2	92	17.8%	263	40.0%
Daintree SA2	104	15.7%	246	41.8%
Douglas Shire	194	16.5%	512	40.6%
Cairns Regional Council	2,449	13.1%	6,975	37.0%
Townsville City Council	2,191	10.2%	6,508	28.4%
Livingstone Shire Council	499	12.2%	916	35.7%
Queensland	76,615	13.6%	199,511	35.7%

Source: ABS Census of Population and Housing (2021)

2.7 Implications for Douglas Shire

The socio-economic profile indicates that Douglas Shire and its component SA2s are older than the state average, with a higher incidence of couple families without children. The analysis suggests that Douglas Shire is considered a desirable location for retirees or person approaching retirement age. However, data for Daintree SA2 also highlights a relatively high incidence of persons aged 0-14 years, indicative of this part of Douglas Shire also attracting families.

Historic population data indicates steady population growth within the region, with the rate of population growth in Port Douglas SA2 (1.3%) exceeding Daintree SA2 (0.9% per annum). The localities within Douglas Shire which recorded the most significant population growth were Bonnie Doon, Port Douglas, Craiglie and Mossman.

Prior to the COVID-19 pandemic, population growth within Douglas Shire was driven by net overseas migration. At a sub-regional level, the components of population growth vary considerably, with population growth in Port Douglas SA2 driven primarily by net overseas migration. On the other hand, the population of Daintree SA2 is most reliant on natural increase and to a lesser extent on overseas migration.

In 2021, it was clear that net internal migration to the region was primarily to Port Douglas SA2, as opposed to Daintree SA2. Population growth in Daintree SA2 in 2021 was driven primarily by net natural increase.

Over the past ten years, there was an average of 64 new house approvals per annum in Douglas Shire, comprising 26 new house approvals per annum in Port Douglas SA2 and 38 new house approvals per annum in Daintree SA2. In the most recent year, new house approvals were at historic highs in Port Douglas SA2 and above longer term averages in Daintree SA2. This uplift in new house approvals in Port Douglas SA2 was likely fuelled by the COVID-19 pandemic, whereas the uplift in new house approvals in Daintree SA2 appears more reflective of increased demand for houses by existing residents with Douglas Shire.

Over the past ten years, there was relatively little activity in the attached dwelling market in terms of approvals. This indicates there has been little diversity in dwellings delivered in Douglas Shire over the past ten years, with additional dwellings almost exclusively detached dwellings.

Property market sales data indicates increased median sales prices for all residential property types (attached, detached and vacant land) during COVID-19 (2020-21) and prices in the latest financial year were still well above trend. Additionally, growth in median weekly rents has accelerated, with the region recording historically low residential vacancy rates.

The number of vacant residential land sales increased significantly across the last two financial years when compared to the last decade, likely due to the increasing number of residential dwelling approvals within the Shire. Such large volumes can be attributable to new residential developments such as New Port Estate (Craiglie) and Ocean Breeze Estate (Bonnie Doon / Cooya Beach).

Douglas Shire and the component SA2s have recorded a higher proportion of households experiencing mortgage and rental stress when compared to the surrounding local government areas and Queensland as of the 2021 Census. This trend suggests a need and growing demand for increased supply and greater diversity in housing options within Douglas Shire to improve housing affordability within the region. These pressures have only further been exacerbated with continued increases in median weekly rents significantly above wage increases.

Overall, the growing popularity of the region as a lifestyle location and COVID's reshaped preferences on living location has shifted the composition of population growth within Douglas Shire, and as a result, placed upward pressure on property prices, and hence dwelling demand.

3 Short Term Accommodation Market

The purpose of this chapter is to consider the size of the short term accommodation market in Douglas Shire, specifically the number of dwellings on residential zoned land that are being utilised in the short term letting market, as opposed to meeting the housing needs of local residents. The analysis has considered data published on AirDNA, to understand the size of the short term rental market in Douglas Shire and the parts of Douglas Shire in which the short term accommodation market is most significant.

AirDNA regularly publish statistics regarding the size of the short term accommodation market in various tourist markets globally. This section of the report provides a high level overview of the data available on the AirDNA website.

3.1 Number of Active Rentals

The Douglas market appears to broadly align with the Douglas Shire boundary. AirDNA data is available for the following neighbourhoods within Douglas:

- + Cow-Bay;
- + Craiglie;
- + Daintree;
- + Miallo;
- + Mossman;
- + Oak Beach;
- + Port Douglas;
- + Thornton Beach; and
- + Whyanbeel.

Unsurprisingly, most short term accommodation within Douglas Shire is in Port Douglas and to a lesser extent in Cow-Bay, Craiglie and Oak Beach. Our assessment has focussed on these locations, as it was identified that all other neighbourhoods in Douglas Shire had less than 10 active rentals.

Most active rentals in Douglas Shire are entire homes, with Port Douglas and Cow-Bay offering private room rentals.

The mapping provided which outlines the geographic distribution of short term holiday rentals identifies offerings both within and outside tourist accommodation zones, as detailed below:

- + Port Douglas: Whilst a significant proportion of holiday rentals are contained within the Tourist Accommodation Zone, holiday rentals were also identified on Low Medium Density zoned land located to the east of Port Douglas Road;
- + Craiglie: Most holiday rentals were contained either on Tourist Accommodation zoned land or Medium Density zoned land;
- + Cow-Bay: All holiday rentals are contained within the Conservation Zone; and
- + Oak Beach: Most short term rentals were within the Low Density Residential zone on Oak Street, as opposed to within the Tourism Accommodation Zone.

Table 3-2 summarises the distribution of active rentals by type in Douglas and the key neighbourhoods of Port Douglas, Craiglie, Cow-Bay and Oak Beach.

Table 3-1 Number of Active Rentals by Type, Douglas and Key Neighbourhoods

Neighbourhood	Active Rentals	% Entire Home	% Private Room	% Shared Room
Port Douglas	730	97.8%	2.1%	0.1%
Craiglie	64	100.0%	0.0%	0.0%
Cow-Bay	41	87.8%	12.2%	0.0%
Oak Beach	17	100.0%	0.0%	0.0%
Douglas	1,008	95.4%	4.5%	0.1%

Source: AirDNA (July 2022)

3.2 Average Number of Bedrooms

The average number of bedrooms at short term accommodation establishments varied by location and was lowest in Cow-Bay (1.9 bedrooms / establishment) and highest in Oak Beach (2.9 bedrooms / establishment).

The data suggests that both Cow-Bay and Port Douglas are characterised by a higher incidence of short term accommodation properties that are units, based on the higher incidence of properties that have two or fewer bedrooms.

Table 3-3 summarises data relating to the number of bedrooms per short term establishment in Douglas and relevant neighbourhoods.

Table 3-2 Distribution of Active Rentals by Number of Bedrooms, Douglas and Key Neighbourhoods

Neighbourhood	Studio	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Average Bedrooms
Port Douglas	3.4%	21.6%	28.4%	23.8%	14.1%	8.7%	2.5
Craiglie	4.7%	6.3%	32.8%	35.9%	15.6%	4.7%	2.7
Cow-Bay	8.3%	30.6%	38.9%	11.1%	11.1%	0.0%	1.9
Oak Beach	5.9%	5.9%	11.8%	41.2%	35.3%	0.0%	2.9
Douglas	4.3%	21.0%	27.0%	24.7%	15.3%	7.7%	2.5

Source: AirDNA (July 2022)

3.3 Proportion of Properties Available Full Time

AirDNA classifies a short term accommodation offering as available full time if it can be booked for at least 181 days per year. The data indicates that overall, just over half of all establishments identified in Douglas (or 553 dwellings) are available full time, with the incidence of properties available full time highest in Cow-Bay.

Table 3-3 Distribution of Active Rentals Available Full Time, Douglas and Key Neighbourhoods

Neighbourhood	Number of Active Rentals Available Full Time	% Available Full Time
Port Douglas	399	54.6%
Craiglie	33	51.6%
Cow-Bay	26	63.4%
Oak Beach	8	45.0%
Douglas	553	54.9%

Source: AirDNA (July 2022)

4 Projected Population, Dwellings and Households

This section of the report reports population and dwelling projections for Douglas Shire by SA2 between 2021 and 2041. This chapter of the report also presents household projections by number of persons and family structure and dwelling projections by number of bedrooms.

The combined Port Douglas and Daintree SA2s do not align exactly with the Douglas Shire Council boundary, with a small portion of the northern boundary of Douglas Shire falling within the Cape York SA2. However, we note that 98.18% of Douglas Shire's population is contained within the Port Douglas and Daintree SA2s.

For the purposes of assessing the future dwelling needs of Douglas Shire, our assessment has assumed that the total number of dwellings and households in Douglas Shire represents the sum of dwellings and households in Port Douglas and Daintree SA2s.

4.1 Population Projections

The distribution of population growth across Douglas Shire has varied over the past ten years. Overall, the rate of population growth in Port Douglas SA2 has exceeded Daintree SA2. However, further interrogation of annual growth rates indicates that whilst historically Port Douglas SA2 was the focal point of population growth, in the past five years population growth has been higher in Daintree SA2, with the release of greenfield residential subdivisions.

The Queensland Government Statistician's Office (QGSO) regularly prepares population projections, with the most recent series available developed in 2018. Based on these projections, the population of Port Douglas SA2 was anticipated to continue to increase at a significantly higher rate than Daintree SA2.

Based on the QGSO 2018 medium series projections, the rate of population growth was anticipated to be as follows:

- + Port Douglas SA2: Increase by 1.1% per annum between 2021 and 2041;
- + Daintree SA2: Increase by 0.4% per annum between 2021 and 2041; and
- + Combined SA2s: Increase by 0.9% per annum between 2021 and 2041.

By comparison, the rate of population growth achieved in the 2016 to 2021 period within Douglas Shire was:

- + Port Douglas SA2: 0.5% per annum between 2016 and 2021;
- + Daintree SA2: 0.8% per annum between 2016 and 2021; and
- + Combined SA2s: 0.6% per annum between 2016 and 2021.

A review of market trends post 2018 indicates that dwelling growth in Douglas Shire has been almost entirely detached dwellings, which has led to a higher rate of population growth in Daintree SA2 than Port Douglas SA2. The distribution of population growth within Douglas Shire will ultimately be determined by the rate of attached and detached dwelling take-up within the region.

Our approach has adopted the projected rate of growth as determined by QGSO for the combined SA2s but has reallocated the growth by SA2 reflective of recent market trends. The assessment has assumed that in the longer term, there would be a shift towards consolidation, with Port Douglas SA2

accounting for an increasing share of population growth over time. However, the projections have assumed that Daintree SA2 will remain the main growth frontier with Douglas Shire to 2041.

Table 4-1 summarises the assumed proportion of growth to occur within Port Douglas SA2 and Daintree SA2 in the 2021 to 2041 period at each five year interval. Table 4-2 summarises the projected population with the Port Douglas and Daintree SA2s between 2021 and 2041.

Table 4-1 Assumed Distribution of Population Growth, Port Douglas and Daintree SA2s, 2021 to 2041

	Port Douglas SA2	Daintree SA2
2021-26	35%	65%
2026-31	40%	60%
2031-36	40%	60%
2036-41	45%	55%

Source: Bull & Bear Economics estimates

Table 4-2 Projected Population by SA2, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2	5,626	5,812	6,081	6,340	6,622
Daintree SA2	6,734	7,079	7,484	7,872	8,216
Combined SA2s	12,360	12,892	13,565	14,212	14,839

Source: Bull & Bear Economics estimates, informed by QGSO

4.2 Dwelling Projections

The following section reports dwelling projections for the Port Douglas SA2, Daintree SA2 and Douglas Shire. The total number of dwellings in Douglas Shire is assumed to equal the sum of total dwellings in the Port Douglas SA2 and Daintree SA2.

4.2.1 Total Dwelling Projections

Dwelling projections are informed by household projections through the assumption that the number of dwellings is equal to the number of households within an area. As such, household projections were prepared by applying an average household size to the total population projections outlined in Table 4-2. Section 2.1 of this report details the socio-economic characteristics of Douglas Shire and its component SA2s, including average household size as of 2021. It is anticipated that over time, average household size across Australia will decrease as a result of decreasing birth rates and due to an aging population. As such, minor adjustments to the average household size in each SA2 were made.

In line with household projections, it is anticipated that the total number of dwellings in Douglas Shire will increase from 5,509 dwellings in 2021 to 6,680 dwellings in 2041, or by 1.0% per annum. It is projected that growth will be highest within the Daintree SA2, whereby the number of dwellings is anticipated to increase from 2,988 dwellings in 2021 to 3,682 dwellings in 2041, or by 1.1% per annum.

Table 4-2 outlines total dwelling projections for Douglas Shire and its component SA2s between 2021 to 2041.

Table 4-3 Total Dwelling Projections and Household Size – Port Douglas SA2, Daintree SA2, and Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041	Ave. Ann. Growth, 2021-41
Population						
Port Douglas SA2	5,626	5,812	6,081	6,340	6,622	0.8%
Daintree SA2	6,734	7,079	7,484	7,872	8,216	1.0%
Combined SA2s	12,360	12,892	13,565	14,212	14,839	0.9%
Average Household Size						
Port Douglas SA2	2.23	2.23	2.22	2.21	2.21	-0.05%
Daintree SA2	2.25	2.25	2.24	2.24	2.23	-0.05%
Combined SA2s	2.24	2.24	2.23	2.23	2.22	-0.05%
Dwellings						
Port Douglas SA2	2,521	2,611	2,739	2,862	2,997	0.9%
Daintree SA2	2,988	3,149	3,337	3,519	3,682	1.1%
Combined SA2s	5,509	5,760	6,076	6,382	6,680	1.0%

Source: Bull & Bear Economics (2022)

4.2.2 Dwelling Projections by Number of Bedrooms

Within Port Douglas SA2, the most significant dwelling type by number of bedrooms are three-bedroom dwellings, whereby three-bedroom dwellings comprised 32.6% of total dwellings in 2021. It is anticipated that three-bedroom dwellings will increase by 138 dwellings to reach 958 dwellings in 2041. However, it is anticipated that four or more bedroom dwellings will increase by 184 dwellings to reach 844 dwellings in 2041.

Like Port Douglas SA2, the most significant dwelling type by number of bedrooms in Daintree SA2 are three-bedroom dwellings, whereby three-bedroom dwellings comprised 46.0% of total dwellings in

2021. The number of three bedroom dwellings in Daintree SA2 is projected to increase by 325 dwellings to reach 1,698 dwellings in 2041. The next significant dwelling type are four or more bedroom dwellings which are anticipated to increase by 194 dwellings to reach 909 dwellings in 2041.

Overall, three bedroom dwellings are expected to remain the most significant dwelling type in Douglas Shire over the projection period, with the number of three bedroom dwellings anticipated to increase by 463 dwellings to reach 2,657 dwellings in 2041. It is also anticipated that the proportion of four or more bedroom dwellings will increase over time from 24.9% of dwellings in 2021 to 26.2% of dwellings in 2041, or by 379 dwellings.

Table 4-3 details dwelling projections by number of bedrooms for Douglas Shire and its component SA2s between 2021 and 2041.

Table 4-4 Dwelling Projections by Number of Bedrooms – Douglas Shire by SA2, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2					
0 or 1 bedroom	254	257	272	283	297
2 bedrooms	787	757	822	855	898
3 bedrooms	821	825	877	915	958
4+ bedrooms	659	772	767	809	844
Total	2,521	2,610	2,738	2,862	2,997
Daintree SA2					
0 or 1 bedroom	217	205	220	225	232
2 bedrooms	684	723	765	806	843
3 bedrooms	1,373	1,425	1,531	1,618	1,698
4+ bedrooms	714	796	821	870	909
Total	2,988	3,149	3,337	3,519	3,683
Douglas Shire					
0 or 1 bedroom	470	462	492	508	529
2 bedrooms	1,471	1,480	1,587	1,661	1,741
3 bedrooms	2,194	2,250	2,408	2,532	2,657
4+ bedrooms	1,374	1,568	1,588	1,679	1,753
Total	5,509	5,760	6,076	6,381	6,679

Source: Bull & Bear Economics (2022)

4.3 Household Projections

4.3.1 Household Projections by Number of Persons

Between 2021 and 2041, it is projected that the two person households will remain the most significant household type in Port Douglas SA2, with two person households anticipated to increase from 1,110 dwellings in 2021 to 1,291 dwellings in 2041. One person households are also expected to record a significant increase, from 725 dwellings in 2021 to 891 dwellings in 2041.

Like Port Douglas SA2, the most significant dwelling type by number of persons in Daintree SA2 are two person households, whereby the incidence of two persons households is anticipated to increase from 1,168 dwellings in 2021 to 1,477 dwellings in 2041. Five or more person households are expected to record the most significant change (besides two person households), increasing by 114 households to reach 360 households by 2041.

Overall, two person households are anticipated to be the most significant household type by within Douglas Shire. It is expected that the incidence of two person households in Douglas Shire will increase by 496 dwellings by 2041. One person households are also expected to record significant growth, increasing by 340 dwellings over the projection period, with 271 of these households to be located in Port Douglas SA2. Comparably, five person or more person households are anticipated to increase by 178 dwellings by 2041.

Table 4-4 details household projections by number of persons for Douglas Shire and its component SA2s between 2021 and 2041.

Table 4-5 Household Projections by Number of Persons per Household – Douglas Shire by SA2, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2					
One Person	725	788	809	850	891
Two Person	1,110	1,101	1,184	1,232	1,291
Three Person	295	269	295	304	319
Four Person	244	233	251	260	273
Five or more Persons	146	219	200	215	223
Total Households	2,521	2,610	2,738	2,862	2,997
Daintree SA2					
One Person	875	879	951	997	1,043
Two Person	1,168	1,279	1,335	1,412	1,477
Three Person	352	332	366	379	396
Four Person	346	331	367	386	407
Five or more Persons	246	328	319	344	360
Total Households	2,988	3,149	3,337	3,519	3,683
Douglas Shire					
One Person	1,600	1,667	1,760	1,847	1,934
Two Person	2,279	2,381	2,519	2,644	2,767
Three Person	648	602	661	684	715
Four Person	590	563	617	646	679
Five or more Persons	392	548	518	560	584
Total Households	5,509	5,760	6,076	6,381	6,679

Source: Bull & Bear Economics (2022)

4.3.2 Household Projections by Family Structure

Between 2021 and 2041, it is anticipated that the most significant household composition within Port Douglas SA2 will be couple families with no children, increasing to 1,316 households in 2041. Lone person households are anticipated to remain the next significant household composition, increasing from 542 households in 2021 to 647 households in 2041.

Within Daintree SA2, it is anticipated that couple families with no children will remain the most significant household type, increasing from 1,075 households in 2021 to 1,310 households in 2041. Couple families with children are anticipated to remain the next significant household type, increasing from 764 households in 2021 to 947 households in 2041.

By 2041, couple families with no children will comprise 39.3% of total households in Douglas Shire, increasing by 441 households to reach 2,626 households. Couple families with children and lone

person households will also remain significant household types, with the former category expected to increase by 282 households and the latter category to increase by 258 households between 2021 and 2041.

Table 4-5 details household projections by household composition for Douglas Shire and its component SA2s between 2021 and 2041.

Table 4-6 Household Projections by Household Composition – Douglas Shire by SA2, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2					
Couple family with no children	1,109	1,148	1,203	1,257	1,316
Couple family with children	537	556	583	608	636
One Parent Family	186	192	202	211	222
Other Family	6	6	7	7	7
Total Family Households	1,838	1,903	1,995	2,084	2,181
Lone Person Households	542	561	590	617	647
Group Households	141	146	154	161	169
Total Households	2,521	2,610	2,738	2,862	2,997
Daintree SA2					
Couple family with no children	1,075	1,130	1,193	1,255	1,310
Couple family with children	764	806	856	904	947
One Parent Family	374	398	425	451	475
Other Family	40	42	44	46	48
Total Family Households	2,253	2,376	2,518	2,656	2,779
Lone Person Households	662	698	739	779	815
Group Households	72	76	80	84	88
Total Households	2,988	3,149	3,337	3,519	3,683
Douglas Shire					
Couple family with no children	2,184	2,277	2,397	2,512	2,626
Couple family with children	1,301	1,362	1,439	1,512	1,583
One Parent Family	560	590	627	663	697
Other Family	46	48	51	53	55
Total Family Households	4,091	4,278	4,513	4,740	4,960
Lone Person Households	1,204	1,259	1,329	1,396	1,462
Group Households	213	222	234	245	257
Total Households	5,509	5,760	6,076	6,381	6,679

Source: Bull & Bear Economics (2022)

5 Estimated Dwelling Capacity

To understand the remaining dwelling capacity of Douglas Shire, this chapter has assessed the quantum of vacant and underutilised land within Douglas Shire by locality, based on data collated by Douglas Shire Council in August 2022.

Consideration has also been given to residential approvals to understand the pipeline of residential land supply with Douglas Shire. The analysis has removed these approved allotments from the vacant and underutilised land supply analysis to avoid double counting of remaining capacity.

For the purposes of this assessment, underutilised land has been defined as sites within the Low-Medium Residential, Medium Density Residential, Centre and Tourism Accommodation zones currently occupied by a residential dwelling, assuming the following minimum lot sizes (based on advice from Council):

- + Low-Medium Residential: minimum lot size of 900sqm; and
- + Medium Density Residential, Centre and Tourism Accommodation: minimum lot size of 1,000sqm.

The analysis has converted vacant and underutilised sites (after adjusting for development approvals) to an indicative dwelling capacity to assist in identifying whether sufficient capacity exists within zoned land to accommodate projected population growth in Douglas Shire and its component SA2s. In the case of approvals, the assessment has assumed the dwelling capacity aligns with the approval. The assessment has assumed that to 2041, the majority of vacant sites could be developed.

In the case of sites within the centre and tourism accommodation zone, it is recognised that uses on these sites may not be residential of nature. To account for this, the assessment has assumed only a proportion of these sites are developed for long term residential accommodation based on assumptions in the Local Government Infrastructure Plan (LGIP) for Douglas Shire.

In preparing the assessment, estimated capacity has been estimated for the following sub-categories:

- + Vacant residential land without an existing approval;
- + Underutilised land without an existing approval; and
- + Existing approvals for residential uses.

5.1 Vacant Residential Land without an Existing Approval

In August 2022, there was 150.47 hectares of vacant residential land identified in Douglas Shire without an existing approval. Over half of vacant residential lots identified within Douglas Shire without an existing approval were within the low density residential (87.10 hectares) zone. Notably, vacant land within the higher density zones (i.e. medium density residential, tourist accommodation and centre zone) are primarily located in the Port Douglas SA2, whereas vacant residential land without an existing approval is primarily located within Daintree SA2.

Table 5-1 summarises the area of vacant residential land by zone in Douglas Shire as of August 2022 without an existing approval, while Appendix B provides a breakdown by suburb.

Table 5-1 Area of Vacant Residential Land (Ha) by Zone – Douglas Shire, August 2022

Zoning	Port Douglas SA2	Daintree SA2	Douglas Shire
Low Density Residential	43.72	43.37	87.10
Low-Medium Density Residential	2.68	0.72	3.40
Medium Density Residential	2.97	0.00	2.97
Tourist Accommodation	10.32	0.00	10.32
Rural Residential	3.83	41.98	45.81
Centre Zone	0.67	0.21	0.87
Total	64.19	86.28	150.47

Source: Douglas Shire Council (2022)

5.2 Underutilised Residential Land without an Existing Approval

In total, 20.17 hectares of underutilised residential land (i.e. land that has potential redevelopment opportunities) were identified within Douglas Shire without an existing approval. Over half of this land is in Port Douglas SA2, while 9.67 hectares is identified in Daintree SA2. The majority of underutilised residential lots are within the low-medium density residential zone.

Table 5-2 summarises underutilised residential land in Douglas Shire by Zone as of August 2022, while Appendix B provides a breakdown by suburb.

Table 5-2 Underutilised Residential Land (Ha) by Zone – Douglas Shire, August 2022

Zoning	Port Douglas SA2	Daintree SA2	Douglas Shire
Low-Medium Density Residential	8.22	7.31	15.54
Medium Density Residential	1.52	0.00	1.52
Centre Zone	0.76	2.35	3.12
Total	10.51	9.67	20.17

Source: Douglas Shire Council (2022)

5.3 Existing Approvals for Residential Uses

Based on data provided by Council, there were ten significant residential developments identified, which would provide the following residential yield:

- + Port Douglas SA2: Additional 387 residential allotments approved, with capacity for an additional 50-55 residential allotments in the future;
- + Daintree SA2: Additional 398 residential allotments approved, with capacity for an additional 204 residential allotments in the future.

Table 5-3 provides details regarding the significant approved and anticipated residential developments within Douglas Shire, based on data provided by Council.

Table 5-3 Significant Approved and Anticipated Residential Developments – Douglas Shire, 2022

Lot & Plan	Area (Ha)	Remaining Yield (no.)	SA2	Zone	Potential Future Development Yield (no.)
Lot 900 SP322659 (Newport Estate)	30.5	283	Port Douglas	LDR	20
Lot 24 SR423, Lot 3 RP 730522 & Lot 1 RP 725770 (Craiglie)	19.6	104	Port Douglas	LDR	-
Lot 1-3 on C2254 (Craiglie)	4.0	-	Port Douglas	Rural	30-35

Lot & Plan	Area (Ha)	Remaining Yield (no.)	SA2	Zone	Potential Future Development Yield (no.)
Lot 45 SP183690 & Lot10887362 (Mossman – Shepperd Valley Estate)	15.0	106	Daintree	LDR	-
Lot401 SP317071 (Daintree Horizon Estate)	30.4	68	Daintree	LDR	204 (based on future stages plan)
Lot 12 SP 252360 (Mossman)	3.6	19	Daintree	Community Facilities	-
Lot 51 SP168537 (Newell Beach)	37.9	22	Daintree	LDR	
Lot 1 & 2 SP259953 (Wonga Beach)	6.0	12	Daintree	LDR	-
Lot 51 SP155078	38.9	99	Daintree	RR	-
Lot 32 SP126925 (Wonga Beach)	56.3	72	Daintree	RR	-
Port Douglas SA2	54.1	387			50-55
Daintree SA2	188.1	398			204

Source: Douglas Shire Council (2022)

5.4 Dwelling Capacity for Vacant and Underutilised Sites without an Approval

Whilst the dwelling capacity for existing approvals is clear and based on data provided by Council, the dwelling capacity for vacant and underutilised land without an existing approval is less clear. This section of the report outlines the assumptions applied in determining the potential capacity of vacant and underutilised sites within Douglas Shire without an existing approval.

5.4.1 Assumed Densities for Vacant and Underutilised Land

The estimated dwelling capacity for vacant and underutilised sites without an existing approval has been estimated through applying assumptions regarding minimum lot sizes and dwelling density assumptions (informed by the Douglas Shire Local Government Infrastructure Plan (LGIP)).

Table 5-4 outlines the minimum lot sizes and dwelling densities utilised in this assessment for vacant and underutilised sites without an existing approval in place.

Table 5-4 Yield Assumptions – Douglas Shire

	Minimum Lot Size (sqm)	Assumed Dwellings per Hectare
Low Density Residential	600	10
Low-Medium Density Residential	900	12
Medium Density Residential	1,000	34
Tourist Accommodation	1,000	34
Rural Residential	4,000	2
Centre Zone	600	40

Source: Douglas Shire Planning Scheme (2019)

5.4.2 Vacant Dwelling Yield

It is estimated that based on the vacant and residential land currently available in Douglas Shire, as well as the yield assumptions outlined in Table 5-4, there is a potential yield of 1,525 dwellings, comprising 984 dwellings in Port Douglas SA2 and 541 dwellings in Daintree SA2. However, it is likely that over the next twenty years, not all identified vacant land will be developed. As such, it has

been assumed that the probability of the vacant lots being developed is 90%. The adjusted yield suggests that 1,373 dwellings could potentially be developed, with 886 dwellings located in Port Douglas SA2 and 487 located in Daintree SA2.

Table 5-5 summarises the estimated dwelling yield of vacant residential zoned land by SA2 in Douglas Shire for sites without an existing development approval.

Table 5-5 Estimated Yield of Vacant Residential Land without an Existing Approval – Douglas Shire, 2022

	Vacant			
	Total Hectares	Net Development Yield	Probability Of Development	Adjusted Yield
Low Density Residential				
Port Douglas SA2	43.72	442	90.0%	398
Daintree SA2	43.37	435	90.0%	392
Douglas Shire	87.10	877	90.0%	789
Low Medium Density Residential				
Port Douglas SA2	2.68	32	90.0%	29
Daintree SA2	0.72	9	90.0%	8
Douglas Shire	3.40	41	90.0%	37
Medium Density Residential				
Port Douglas SA2	2.97	124	90.0%	112
Daintree SA2	0.00	0	90.0%	0
Douglas Shire	2.97	124	90.0%	112
Tourist Accommodation				
Port Douglas SA2	10.32	342	90.0%	308
Daintree SA2	0.00	0	90.0%	0
Douglas Shire	10.32	342	90.0%	308
Rural Residential				
Port Douglas SA2	3.83	7	90.0%	6
Daintree SA2	41.98	84	90.0%	76
Douglas Shire	45.81	91	90.0%	82
Centre Zone				
Port Douglas SA2	0.67	37	90.0%	33
Daintree SA2	0.21	13	90.0%	12
Douglas Shire	0.87	50	90.0%	45
Total				
Port Douglas SA2	64.19	984	-	886
Daintree SA2	86.28	541	-	487
Douglas Shire	150.47	1,525	-	1,373

Source: Douglas Shire Council (2022); Bull & Bear Economics Estimates (2022)

5.4.3 Underutilised Dwelling Yield

On the other hand, underutilised residential land without a development approval in Douglas Shire has an estimated yield of 346 additional dwellings. However, this anticipated dwelling yield has been revised downwards, to reflect the probability of development to 2041 as follows:

- + 55% for underutilised sites in the low medium density residential zone;
- + 65% for underutilised sites in the medium density residential zone; and
- + 50% for underutilised sites in the centre zone.

Based on the probabilities of development, Douglas Shire has the capacity to yield an additional 190 dwellings from underutilised land within the low medium density residential, medium density residential and centres zones, comprising 98 dwellings in Port Douglas SA2 and 92 dwellings in Daintree SA2.

Table 5-6 summarises the dwelling yield of underutilised residential zoned land by SA2 in Douglas Shire.

Table 5-6 Yield of Underutilised Residential Land – Douglas Shire, 2022

	Underutilised			
	Total Hectares	Net Development Yield	Probability Of Development	Adjusted Yield
Low Medium Density Residential				
Port Douglas SA2	8.22	87	55.0%	48
Daintree SA2	7.31	82	55.0%	45
Douglas Shire	15.54	169	55.0%	93
Medium Density Residential				
Port Douglas SA2	1.52	52	65.0%	34
Daintree SA2	0.00	0	65.0%	0
Douglas Shire	1.52	52	65.0%	34
Centre Zone				
Port Douglas SA2	0.76	31	50.0%	16
Daintree SA2	2.35	94	50.0%	47
Douglas Shire	3.12	125	50.0%	63
Total				
Port Douglas SA2	10.51	170	-	98
Daintree SA2	9.67	176	-	92
Douglas Shire	20.17	346	-	190

Source: Douglas Shire Council (2022); Bull & Bear Economics Estimates (2022)

5.4.4 Summary

Based on the preceding analysis, there is estimated capacity for an additional 2,607 dwellings in Douglas Shire, comprising capacity for an additional 1,426 dwellings in Port Douglas SA2 and 1,181 dwellings in Daintree SA2. The remaining capacity within both Port Douglas SA2 and Daintree SA2 can be delivered on vacant land and through existing approvals (both current and future stages), as opposed to the development of underutilised sites, which have the potential to accommodate an additional 190 attached dwellings.

Table 5-7 Estimated Remaining Capacity by SA2

	Vacant Land (without existing approval)	Underutilised Sites (without existing approval)	Approvals (inc future stages)	Total
Port Douglas SA2	886	98	442	1,426
Daintree SA2	487	92	602	1,181
Douglas Shire	1,373	190	1,044	2,607

6 Demand for Specialised Housing Typologies

This section of the report estimates the demand (current and projected), supply (existing and approved) and need for additional retirement village independent living units (ILUs) and manufactured home parks and residential aged care beds within Port Douglas SA2, Daintree SA2 and Douglas Shire as a whole.

The approach utilised to generate demand estimates for retirement village ILUs and manufactured home parks 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	Demand Methodology
Retirement Living (i.e. retirement village ILUs and manufactured home parks)	<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 2.2% for Manufacture 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	<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 Derived Residential Aged Care place estimates.

Source: Bull & Bear Economics (2022)

6.1 Population Projections for Relevant Age Cohorts

In 2021, Douglas Shire had an estimated residential population of 12,360 persons. This total is anticipated to increase by 2,448 persons to reach 14,808 persons in 2041. Relevantly, Douglas Shire had an estimated residential population of 2,479 persons aged 65 years and older in 2021. This total is anticipated to increase by 1,904 persons to reach 4,383 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, Douglas Shire had an estimated residential population of 1,615 persons aged 70 years and older in 2021. This total is anticipated to increase by 1,710 persons to reach 3,325 persons aged 70 years and older in 2041. The 70 years and older cohort is typically used to inform residential aged care places demand modelling.

Table 6-2 denotes total population estimates, 65 years and older population estimates and 70 years and over population estimates for Douglas Shire and its component SA2s between 2021 and 2041.

Table 6-2 Estimated Residential Population by Age Group – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
Total Population						
Port Douglas	5,626	5,812	6,081	6,340	6,622	0.8%
Daintree	6,734	7,079	7,484	7,872	8,216	1.0%
Douglas Shire	12,360	12,892	13,565	14,212	14,839	0.9%

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
65+ Population						
Port Douglas	1,105	1,361	1,580	1,731	1,855	2.6%
Daintree	1,374	1,701	2,016	2,281	2,528	3.1%
Douglas Shire	2,479	3,062	3,596	4,012	4,383	2.9%
70+ Population						
Port Douglas	689	845	1,047	1,213	1,327	3.3%
Daintree	926	1,204	1,502	1,771	1,998	3.9%
Douglas Shire	1,615	2,049	2,549	2,984	3,325	3.7%

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 Living Assessment

This section of the report considers the need for additional retirement village ILUs and manufactured home parks in Douglas Shire.

6.2.1 Existing, Pending & Approved Supply

As of 30 April 2022, there is one registered retirement village within Douglas Shire, providing a total of 10 independent living units (ILUs). This retirement village, Good Shepherd Village, is located on Gorge Road, Mossman in the Daintree SA2 and has been in operation since 1 July 2000. As of 28 June 2022, there are no manufactured home parks located in Douglas Shire.

There is one approved development application within Douglas Shire for a retirement village, located in the Port Douglas SA2 at 111-119 Port Douglas Road, providing 42 ILUs. Advice from Council has indicated that this facility will not proceed as the developer is looking at a new proposal to develop the site for medium density housing.

6.2.2 Historic Take-up Rates

As of the 2016 Census, Douglas Shire had a take-up rate of 0.3% for retirement living (decrease of 2.9% points relative to 2011 Census) for persons aged 65 years and over. The substantial decrease between 2011 and 2016 is likely due to a change in the options for dwelling locations available in the Censuses. As such, it is likely that persons living in retirement communities answered the 2011 Census as living in a retirement village. Retirement communities are not included in Bull & Bear Economics' supply demand assessment of retirement living as retirement communities are not registered facilities and are instead considered as informal senior living centres. It is also possible that general confusion in answering the Census questionnaire also contributed to the substantial decrease between 2011 and 2016.

In 2016, Douglas Shire recorded a lower take-up rate for retirement living when compared to Far North Queensland (difference of 1.2% points) and a significantly lower take-up rate when compared with Queensland (difference of 5.9% points), which is to be expected given the relatively low level of supply in Douglas Shire.

Cairns and Tablelands local government areas were assessed for the purposes of comparison. Douglas Shire recorded a similar take-up rate for retirement villages to that of Cairns in 2011, which was significantly higher when compared to the Tablelands region. However, in 2016, the take-up

rate of retirement villages in Douglas Shire decreased significantly and was closer to the take-up rates recorded within Tablelands.

Table 6-3 details the historic take-up rate of manufactured home parks and retirement villages in 2011 and 2016.

Table 6-3 Historic Take-up rates of Retirement Living by Statistical Geography – Far North Queensland, 2011 and 2016

Statistical Geography	2011	2016	Growth, 2011-16 (% points)
Retirement Villages			
Douglas Shire	3.2%	0.3%	-2.9%
Cairns	2.9%	2.3%	-0.5%
Tablelands	0.7%	0.8%	0.1%
Far North Queensland	2.3%	1.5%	-0.8%
Queensland	6.2%	6.2%	0.1%
Manufactured Home Parks and Retirement Villages			
Douglas Shire	3.2%	0.3%	-2.9%
Cairns	2.9%	2.3%	-0.5%
Tablelands	0.7%	0.8%	0.1%
Far North Queensland	2.3%	1.5%	-0.8%
Queensland	6.5%	6.5%	0.0%

Note: As Douglas Shire was not a local government area in 2011, the sum of Daintree SA2 and Port Douglas SA2 have been used in order to compare with 2016 figures; Manufactured home park take-up rates have not been reported as there were no manufactured home parks in Far North Queensland as of 2016.

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

Notably, a manufactured home park, Botanica Lifestyle Resort, was opened in 2020 in Cairns. This manufactured home park is a large development which will eventually house a total of 188 ILUs. The opening of Botanica Lifestyle Resort could indicate potential interest in opening other manufactured home parks in Far North Queensland in the future.

6.2.3 Projected Demand

Based on the information detailed in Table 6-3, three scenarios have been considered to complete a robust assessment of retirement living demand in Douglas Shire, as described below:

- + Scenario One: Take up of manufactured home parks and retirement villages in Douglas Shire remains constant at 0.3% throughout the projection horizon;
- + Scenario Two: Take up of manufactured home parks and retirement villages in Douglas Shire reaches 1.5% by 2041 (Far North Queensland take-up rate in 2016); and
- + Scenario Three: Take up of manufactured home parks and retirement villages in Douglas Shire reaches 6.5% by 2041 (Queensland take-up rate in 2016).

6.2.3.1 Scenario One

Under Scenario One, demand has been derived based on population projections for persons aged 65 years and over and by consistently applying the 2016 historic take-up rate of 0.3% for retirement living in Douglas Shire. This assessment also assumes that there are 1.3 persons per ILU / manufactured home park dwelling.

Under this scenario, the demand for independent retirement living is projected to increase from six dwellings in 2021 to 11 dwellings in 2041.

Table 6-4 details demand for retirement village and manufactured home park ILUs within Douglas Shire between 2021 and 2041 under scenario one.

Table 6-4 Scenario One: Demand for Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2	3	3	4	4	4
Daintree SA2	3	4	5	5	6
Douglas Shire	6	7	9	10	11

Source: Bull & Bear Economics (2022)

6.2.3.2 Scenario Two

Demand for retirement living facilities under Scenario Two has been derived based on population projections for persons aged 65 years and over and by assuming that the take-up rate of retirement living in Douglas Shire will reach the 2016 take-up rate of Far North Queensland by 2041. The Far North Queensland take-up rate has been used due to the significant discrepancy recorded between 2011 and 2016 for Douglas Shire, which is believed to be not representative of the actual take-up rates in Douglas Shire. The 2016 take-up rate of Far North Queensland of 1.5% also falls between the 2011 and 2016 take-up rates for Douglas Shire and hence is expected to be a more reasonable assumption. This assessment also assumes that there are 1.3 persons per ILU / manufactured home park dwelling.

Under this scenario, the demand for independent retirement living is projected to increase from 11 dwellings in 2021 to 51 dwellings in 2041.

Table 6-5 details demand for retirement village and manufactured home park ILUs within Douglas Shire between 2021 and 2041 under scenario two.

Table 6-5 Scenario Two: Demand for Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2	5	8	13	17	22
Daintree SA2	6	10	16	22	30
Douglas Shire	11	19	29	39	51

Source: Bull & Bear Economics (2022)

6.2.3.3 Scenario Three

For Scenario Three, demand for retirement living facilities has been derived based on the population projections for persons aged 65 years and older. The opening of manufactured home parks in Cairns suggests that there could be a potentially greater take-up rate of retirement living facilities in Douglas Shire than what was historically recorded. As such, to ascertain a potential range of demand that could be seen in Douglas Shire, it has been assumed Douglas Shire will reach the Queensland's 2016 historical take-up rate of 6.5% by 2041. This assessment also assumes there are 1.3 persons per ILU / manufactured home park dwelling.

Under this scenario, the demand for independent retirement living is projected to increase from 29 dwellings in 2021 to 218 dwellings in 2041.

Table 6-6 details demand for retirement village and manufactured home park ILUs within Douglas Shire between 2021 and 2041 under scenario three.

Table 6-6 Scenario Three: Demand for Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2	13	29	49	70	92
Daintree SA2	16	36	62	92	126
Douglas Shire	29	65	111	161	218

Source: Bull & Bear Economics (2022)

6.2.4 Supply Demand Balance

6.2.4.1 Scenario One

As discussed in Section 6.2.1, there are 10 ILUs and no manufactured home park units in Douglas Shire.

Based on the demand outlined in Table 5-4 and the supply outlined in Section 5.2.1, a supply demand balance for Scenario One has been derived. In 2021, Douglas Shire recorded a marginal oversupply of independent retirement living. By 2041, Douglas Shire is anticipated to have a marginal undersupply of independent retirement living.

Table 6-7 details the supply demand balance of independent retirement living between 2021 to 2041 for Douglas Shire under Scenario One.

Table 6-7 Scenario One: Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) Supply Demand Balance – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Demand for ILUs					
Port Douglas SA2	3	3	4	4	4
Daintree SA2	3	4	5	5	6
Douglas Shire	6	7	9	10	11
Existing and Approved ILUs and MHP Sites Supply					
Port Douglas SA2	0	0	0	0	0
Daintree SA2	10	10	10	10	10
Douglas Shire	10	10	10	10	10
Supply Demand Balance					
Port Douglas SA2	-3	-3	-4	-4	-4
Daintree SA2	7	6	5	5	4
Douglas Shire	4	3	1	0	-1

Note: A positive number indicates an oversupply, while a negative number refers to the number of additional places supportable.

Source: Bull & Bear Economics (2022)

6.2.4.2 Scenario Two

Based on the demand outlined in Table 5-5 and existing and approved supply in Douglas Shire, a supply demand balance for retirement living has been derived for Scenario Two. In 2021, Douglas Shire recorded a slight undersupply of 1 retirement living dwellings, while Port Douglas SA2 recorded an undersupply of 5 ILUs and Daintree SA2 an oversupply of 4 retirement living dwellings. With the opening of a new retirement facility in Port Douglas SA2 by 2026, it is anticipated Douglas Shire will have a marginal oversupply of one retirement living dwelling in 2041, while Port Douglas SA2 is projected to have an oversupply of 20 retirement living dwellings and Daintree SA2 is projected to have an undersupply of 20 retirement living dwellings.

Overall, the analysis under Scenario Two indicates a shortfall in independent retirement living, increasing from one dwelling in 2021 to 41 dwellings in 2041. .

Table 6-8 details the supply demand balance of retirement living between 2021 to 2041 for Douglas Shire under Scenario Two.

Table 6-8 Scenario Two: Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) Supply Demand Balance – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Demand for ILUs					
Port Douglas SA2	5	8	13	17	22
Daintree SA2	6	10	16	22	30
Douglas Shire	11	19	29	39	51
Existing and Approved ILUs and MHP Sites Supply					
Port Douglas SA2	0	0	0	0	0
Daintree SA2	10	10	10	10	10
Douglas Shire	10	10	10	10	10
Supply Demand Balance					
Port Douglas SA2	-5	34	29	25	20
Daintree SA2	4	0	-6	-12	-20
Douglas Shire	-1	33	23	13	1

Note: A positive number indicates an oversupply, while a negative number refers to the number of additional places supportable.

Source: Bull & Bear Economics (2022)

6.2.4.3 Scenario Three

Assuming the take-up rate of retirement living units will reach 6.5% by 2041, there will be an undersupply in Douglas Shire, increasing from 19 dwellings in 2021 to 166 dwellings in 2041. It is expected a significant portion of this undersupply will be in Daintree SA2, where the undersupply will increase from 6 dwellings in 2021 to 116 dwellings in 2041. Comparably, Port Douglas SA2 will record a lower undersupply, increasing from 13 dwellings in 2021 to 92 dwellings in 2041.

Therefore, under Scenario Three, there is a significant imbalance in supply and demand within the independent retirement living market in Douglas Shire.

Table 6-9 details the supply demand balance of retirement living units in Douglas Shire and its component SA2s between 2021 and 2041 following Scenario Three.

Table 6-9 Scenario Three: Independent Retirement Living (Retirement Village ILUs and Manufactured Home Parks) Supply Demand Balance – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Demand for ILUs					
Port Douglas SA2	13	29	49	70	92
Daintree SA2	16	36	62	92	126
Douglas Shire	29	65	111	161	218
Existing and Approved ILUs and MHP Sites Supply					
Port Douglas SA2	0	0	0	0	0
Daintree SA2	10	10	10	10	10
Douglas Shire	10	10	10	10	10
Supply Demand Balance					
Port Douglas SA2	-13	-29	-49	-70	-92

	2021	2026	2031	2036	2041
Daintree SA2	-6	-26	-52	-82	-116
Douglas Shire	-19	-55	-101	-151	-208

Note: A positive number indicates an oversupply, while a negative number refers to the number of additional places supportable.

Source: Bull & Bear Economics (2022)

6.2.4.4 Scenario Comparison

Based on Scenario One (consistent take-up rate of 0.3%), Douglas Shire will have an oversupply of retirement living dwellings over the projection period. However, under Scenario Two (gradual increase in take-up rate, reaching 1.5% by 2041) it is anticipated that Douglas Shire will have an undersupply of independent retirement living dwellings throughout the projection horizon. Finally, Scenario Three (increase in take-up rate, reaching 6.5% by 2041) suggests there will be an undersupply of independent retirement living dwellings over the entire projection period, increasing from 19 dwellings in 2021 to 208 dwellings in 2041.

Table 6-10 summarises the scenario comparisons of the supply demand balance for retirement ILU/manufactured home park dwellings in Douglas Shire between 2021 and 2041.

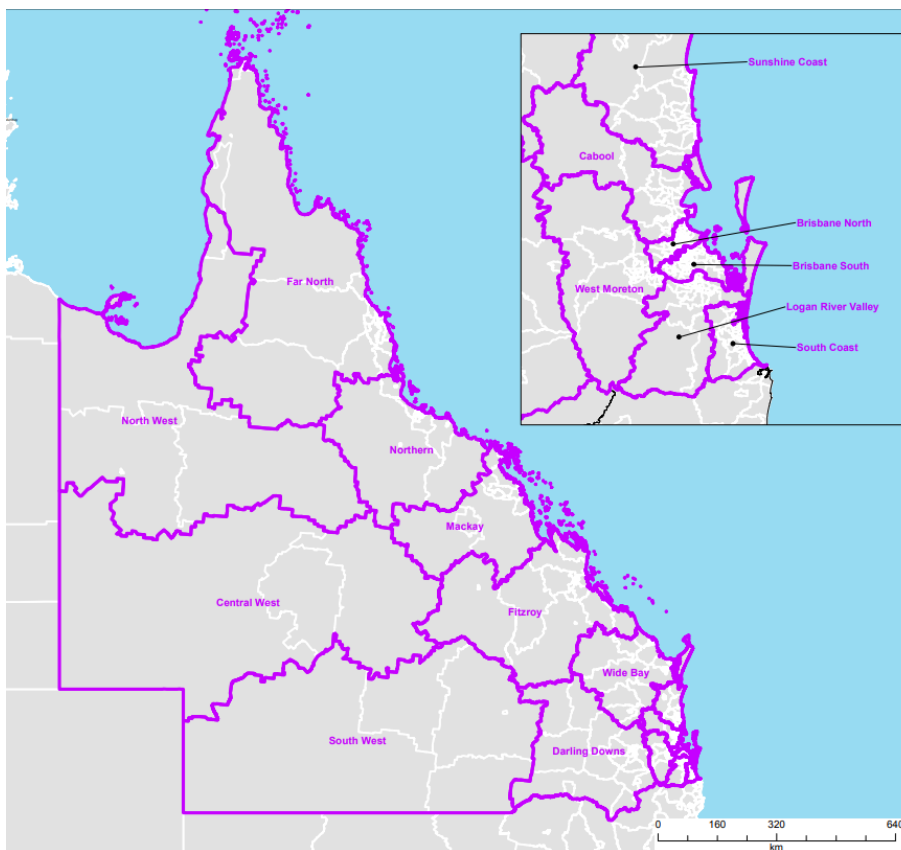
Table 6-10 Scenario Comparison of Supply Demand Balance of Retirement ILU/Manufactured Home Park Dwellings – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Based on historic take-up rate in Douglas Shire	4	3	1	0	-1
Based on historic take-up rate in Far North Queensland	-1	-9	-19	-29	-41
Based on historic take-up rate in Queensland	-19	-55	-101	-151	-208

Source: Bull & Bear Economics (2022)

6.3 Residential Aged Care

Douglas Shire is located within the Far North Aged Care Planning Region (ACPR), as illustrated in Figure 5-1.

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, Pending & Approved Supply

As of 30 June 2021, there are three residential aged care facilities offering a total of 145 residential aged care places in Douglas Shire, as outlined in Table 5-11. One of these facilities is located in Port Douglas SA2 (offering 74 places) while the remaining two facilities are located in Daintree SA2 (offering a total of 71 places).

Table 6-11 Residential Aged Care Places – Douglas Shire, 30 June 2021

Name	Address	ACPR	SA2	No. of Residential Aged Care Places
Ozcare Port Douglas	Martin Scullett Drive, Port Douglas	Far North	Port Douglas	74
Mossman Multipurpose Health Service	9 Hospital Street, Mossman	Far North	Daintree	29
Kubirri Residential Care Centre	49 Johnston Road, Mossman	Far North	Daintree	42
Total				145

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

Based on a search of Douglas Shire Council's online Development Application Service, on 12 July 2022, there were no approved development applications for a residential aged care facility in Douglas Shire.

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%², demand for residential aged care places is derived.

In 2021, there was total demand for 121 aged care places in Douglas Shire, with 52 aged care places demanded in Port Douglas SA2 and 69 aged care places in Daintree SA2. By 2041, it is projected there will be a total demand of 249 aged care places in Douglas Shire, with 100 aged care places demanded in Port Douglas SA2 and 150 aged care places demanded in 2041.

Table 6-12 details demand for residential aged care places within Douglas Shire between 2021 to 2041.

Table 6-12 Demand for Residential Aged Care Places – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2	52	63	79	91	100
Daintree SA2	69	90	113	133	150
Douglas Shire	121	154	191	224	249

Source: Bull & Bear Economics (2022)

As outlined in Section 5.3.1, there was a total of 145 residential aged care places in Douglas Shire, comprised of 74 places in Port Douglas SA2 and 71 places in Daintree SA2. As for approved supply, there are no approved applications for residential aged care facilities in Douglas Shire.

To derive the supply demand balance, it has been assumed that supply will remain constant at 2021 levels over the projections period. As such, in 2021 there was an oversupply of 24 aged care places in Douglas Shire, with Port Douglas SA2 recorded an oversupply of 22 places and Daintree SA2 recording an oversupply of 2 places. By 2041, it is anticipated that Douglas Shire will have an undersupply of 104 aged care places, while the SA2s of Port Douglas and Daintree are expected to have an undersupply of 26 places and 79 places, respectively.

This is suggestive of a longer term need to deliver additional aged care beds within Douglas Shire.

Table 6-13 details the supply demand balance of residential aged care places between 2021 and 2041 in Douglas Shire.

Table 6-13 Residential Aged Care Facilities Supply Demand Balance – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Demand for Residential Aged Care Places					
Port Douglas SA2	52	63	79	91	100
Daintree SA2	69	90	113	133	150
Douglas Shire	121	154	191	224	249
Existing Residential Aged Care Places Supply					
Port Douglas SA2	74	74	74	74	74
Daintree SA2	71	71	71	71	71
Douglas Shire	145	145	145	145	145
Supply Demand Balance					

² Productivity Commission (2021), Report on Government Services 2021 – Chapter 14 Aged Care Services, Australian Government, Canberra

	2021	2026	2031	2036	2041
Port Douglas SA2	22	11	-5	-17	-26
Daintree SA2	2	-19	-42	-62	-79
Douglas Shire	24	-9	-46	-79	-104

Note: A positive number indicates an oversupply, while a negative number refers to the number of additional places supportable.

Source: Bull & Bear Economics (2022)

6.4 Key Findings

6.4.1 Context

IBISWorld (2022) reports that there is considerable opportunity for growth in the retirement villages industry as the number of Australians seeking purpose-built seniors housing expands. It is expected that industry operators will also have opportunities to develop alternative age-appropriate facilities for Australia's ageing population following the recent Royal Commission review of Australia's aged care sector which called for complete reform and redesign due to systemic failings in the industry. It is also anticipated that as health standards improve and home care services accessibility across Australia increases, the time spent in retirement villages before higher levels of care are needed will also grow.

Demand for diversified housing types, as well as community, lifestyle and wellness offerings, has grown (Villages.com.au, 2020). Over time, attitudes toward retirement living has shifted away from a traditional affordability perspective towards greater emphasis on lifestyle choice, especially in rural and suburban models of retirement living. Moreover, it is likely more retirees will require age-appropriate accommodation in relation to the measures outlined in the 2021-22 Federal Budget devised to encouraging retiring Australians to downsize their homes in order to free up homes for families.

Trends to co-locate retirement villages with residential aged care units has seen growth in recent years, with this trend forecasted to continue over the next five years with the development of new wellbeing precincts for seniors. As a result, while retirement villages will likely remain positioned to allow older residents greater autonomy, they will likely increase the diversity of their offerings of assisted living and care services so residents can age in one place. IBISWorld also anticipates that over the next five years, establishment numbers will continue to increase, and industry operators will continue seek greater economies of scale by establishing villages with greater capacity.

One of the factors IBISWorld identifies as key to the retirement villages industry of Australia is easy access to further appropriate land for development. Location is a primary source of competition among industry operations; hence, acquiring prime locations proximate to hospitals, shopping centres and public transport is key for industry firms looking to grow.

6.4.2 Key Findings

Formalised retirement living in Far North Queensland has generally been limited, with the historic take-up rate of retirement living decreasing between 2011 and 2016. This trend is evident in Douglas Shire, which has been limited to a single retirement living facility (offering only 10 ILUs). However, assuming that Douglas Shire records a consistently low take-up rate of independent retirement living facilities (0.3% based on the 2016 take-up rate) there will be a marginal undersupply of independent retirement living dwellings in Douglas Shire throughout the projection horizon. However, it is likely that this is an unlikely scenario due to changing trends in the retirement village industry as outlined in Section 5.4.1, in conjunction with the historic low take-up rate being influenced by the lack of supply

additions between 2011 and 2016, despite an increasing incidence of persons aged 65 years and over.

As such, under Scenario Two, demand for retirement living facilities will increase as the take-up rate increases to reach the 2016 take-up rate of Far North Queensland by 2041. This scenario represents a slight uptick in demand following expected trends in the retirement village industry, although based on a conservative estimate. Based on this approach, there would be need for an additional 42 independent retirement living dwellings by 2041.

It is important to note that over 50s lifestyle villages are a relative new offering in the Far North Queensland market, as seen with the recent opening of Botanic Lifestyle Resort which will eventually supply a total of 188 manufactured homes. The opening of this facility could suggest potential interest in expanding the retirement living market in Far North Queensland, following the trends outlined in Section 5.4.1, which in turn could dramatically increase the take-up rate of retirement living to be closer to the State average. As such, Scenario Three considers what the supply and demand could look like in Douglas Shire, should there be a significant uplift in demand for independent retirement living. Under this scenario, Douglas Shire will record an increasing undersupply in independent retirement living as demand grows over the projection period. It is considered likely that demand for independent living in Douglas Shire will fall somewhere between Scenario Two and Three.

In the short to medium term, it is probable that supply and demand of independent retirement living will remain relatively balanced and there will not be additional need for additional facilities. However, in line with national trends, such as the growing ageing population and the corresponding growth in demand for appropriate seniors housing, Douglas Shire will likely need to expand its independent retirement living offerings in the long-term. Moreover, diversification of retirement living will likely grow increasingly important in the future, especially as older Australians will be looking to downsize their homes. As such, there is a potential gap in the Douglas Shire market for this sort of opportunity.

A different scenario is present in the supply demand balance for residential aged care (delivered in beds). This assessment indicates an increasing undersupply of aged care beds within Douglas Shire from 2026 onwards. The undersupply of residential aged care beds throughout the projection horizon suggests 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 Douglas Shire leaving the region in search of appropriate residential care.

The distribution disparity between retirement living and residential aged care supply in the LGA suggests that in the short to medium term Council should approve new facilities focussed on residential aged care. The modelled supply demand balance indicates the Daintree SA2 is anticipated to record the most significant shortfall in aged care facilities.

This assessment has focussed on formalised senior living options (ILUs, manufactured home parks and residential aged care), based on the historic Far North Queensland take-up rate with two additional scenarios considered given relatively low take-up rates presently with Douglas Shire. At present, we note there are no manufactured home parks in Douglas Shire Council and a relatively low provision of this product type more generally in Far North Queensland. In the last two years, there has been a significant uplift in the number of manufactured home sites in Queensland, typically designed to tailor to the 50 years and over population. 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 compact seniors living options for downsizers and retirees.

There are a number of informal seniors living facilities across Queensland 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 benefit from access to outdoor areas without maintaining the area themselves.

Within Douglas Shire, an example of informal seniors living is Douglas Shire Aged Persons Home Inc which operates under the long-term social housing program of the Queensland Department of Housing. Douglas Shire Aged Persons Homes Inc manages 48 properties, whereby rent is charged for these units based on the tenant's income calculated at 25% of assessable income plus all rent assistance.

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 indeterminant.

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 household size at 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 2020 edition of population projections. The household projections for Douglas Shire (which are equal to dwelling projections) are outlined in Section 4.2. These household / dwelling projections were then grouped in three categories, namely:

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

A comparison of 2021 households and dwellings by size for each SA2 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 each SA2, while there are usually fewer medium households than medium dwellings and significantly fewer larger households than large dwellings. This suggests that to varying degrees, the dwelling stock in the designated SA2 is skewed away from small dwellings toward larger dwellings. The ratios within Douglas Shire range from 0.2 to 2.3 across the projection period, as detailed in Table 6-1 below (e.g. in 2041, there were 2.3 times as many small households as there were small dwellings in Douglas Shire).

The ratio of small and large dwelling household ratios are anticipated to remain constant between 2021 and 2041 for Douglas Shire and its component SA2s. At the local government area level, medium dwellings are expected to remain the same, while the medium dwelling ratios for Port Douglas SA2 and Daintree SA2 are both anticipated to decrease by 0.1 to reach a ratio of 0.3 and 0.2, respectively.

At a local government area level, there were twice as many small households as there were small dwellings in Douglas Shire (according to the 2021 Census). There were also less than half as many medium households (three person) households as there were medium dwellings (three bedroom) and over half as many large households (four or more persons) as there were 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 Douglas Shire, the baseline ratio demonstrated by the 2021 Census suggests that the existing distribution of small, medium, and large dwellings 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 Douglas Shire and its component SA2s for 2021 and the projected ratios for 2041.

Table 7-1 Small, Medium and Large Households to Dwelling Ratio– Douglas Shire, 2021 and 2041

	2021			2041		
	Small	Medium	Large	Small	Medium	Large
Port Douglas SA2	1.8	0.4	0.6	1.8	0.3	0.6
Daintree SA2	2.3	0.3	0.8	2.3	0.2	0.8
Douglas Shire	2.0	0.3	0.7	2.0	0.3	0.7

Source: Bull & Bear Economics Analysis (2023)

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 local government area level appears reasonable, there may be instance where policy intervention is needed. For example, if Port Douglas SA2 saw an increase in the proportion of persons aged 0 to 14 years between the 2016 and 2021 Censuses, this could suggest that households in the area are moving the lifecycle of couples (couples without children, to couples with children and then, back to couples without children). In that case, over the course of the next 20 years, residents of Port Douglas SA2 would see downsizing as a relevant consideration as their children move out. This example highlights possible reasoning for intervention 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 SA2s experience population growth over time.

7.2 Adjustments to Dwelling Stock

As identified in Chapter 3, the short term accommodation market is focussed in Port Douglas and to a lesser extent in Craiglie, with holiday rentals identified both in the Tourist Accommodation Zone, on Low Medium Density zoned land to the east of Port Douglas Road and Medium Density Zoned land. Our analysis has adjusted the dwelling stock in the following SA1s, recognising that these properties are more likely to serve the short-term accommodation market, as opposed to provide permanent accommodation for the local population:

- + 3116502;
- + 3116517;
- + 3116508;
- + 3116506;
- + 3116520;
- + 3116518;
- + 3116503; and
- + 3116514.

The following SA1s were identified to accommodate approximately 1,300 dwellings as of the 2021 Census. By comparison, the AirDNA website identified approximately 800 dwellings within the short-term letting market in Port Douglas and Craiglie. It is recognised that when a property is bought or sold it may shift out of the short term letting market and be utilised for permanent accommodation. However, this analysis highlights that approximately 60% of the dwelling stock in these SA1s is not available as permanent accommodation³.

Our understanding of the short term holiday market in Port Douglas is that it is dominated by apartments, but also incorporates townhouse and luxury homes. This is consistent with the distribution of stock within the SA1s in which adjustments have been made. The analysis has assumed that 60% of the dwelling stock in the SA1s identified above represents short term accommodation and hence has been excluded from the analysis.

Table 7-2 presents the adjusted households to dwelling ratios to reflect the number of dwellings in Douglas Shire that serve the local population (i.e. after removal of properties utilised as short term accommodation). In this case, the small household to small dwellings ratio in Port Douglas SA2 more

³ The 60% figure has been derived by dividing 800 short term dwellings by 1,300 total dwellings within the SA2s (which equals 61.5%).

closely aligns with the Daintree SA2, recognising that a significant proportion of the small dwelling stock is not available to the long term residential market.

Table 7-2 outlines the adjusted small, medium, and large households to dwelling ratios in Douglas Shire which have been adjusted to consider the removal of housing which is utilised by the short term accommodation market in Port Douglas and Craiglie.

Table 7-2 Adjusted Small, Medium and Large Households to Dwelling Ratio – Douglas Shire, 2021 and 2041

	2021			2041		
	Small	Medium	Large	Small	Medium	Large
Port Douglas SA2	2.4	0.3	0.5	2.4	0.3	0.5
Daintree SA2	2.3	0.2	0.8	2.3	0.2	0.8
Douglas Shire	2.4	0.3	0.7	2.0	0.3	0.7

Source: Bull & Bear Economics Analysis (2023)

7.3 Housing Need by Dwelling Size

The projected number of dwellings in Douglas Shire are anticipated to increase as follows:

- ✦ The number of small dwellings is anticipated to grow from 1,435 dwellings in 2021 to 1,704 dwellings by 2041, with approximately two thirds of the growth in small dwellings to be accommodated in Daintree SA2;
- ✦ Medium dwellings in Douglas Shire are anticipated to increase from 2,003 dwellings in 2021 to 2,421 dwellings in 2041, with just over three quarters of growth in medium dwellings to be accommodated in Daintree SA2; and
- ✦ Between 2021 and 2041, large dwellings are anticipated to increase from 1,275 dwellings to 1,612 dwellings in 2041, with 58% of growth in large dwellings to be accommodated in Daintree SA2.

Table 7-3 summarises the dwelling projections for small, medium and large dwellings for Douglas Shire and its component SA2s while Appendix C provides a breakdown by five year period.

Table 7-3 Small, Medium and Large Households – Douglas Shire, 2021 and 2041

	2021				2041			
	Small	Medium	Large	Total	Small	Medium	Large	Total
Port Douglas SA2	535	629	561	1,725	629	723	703	2,054
Daintree SA2	900	1,373	714	2,988	1,075	1,698	909	3,683
Douglas Shire	1,435	2,003	1,275	4,713	1,704	2,421	1,612	5,737

Source: Bull & Bear Economics Analysis (2023)

7.4 Housing Need by Dwelling Type

7.4.1 Historic Distribution of Dwelling Stock

Based on the small, medium and large household dwelling projections, demand by dwelling type (i.e. separate house, semi-detached house, etc.) can be derived. To determine the distribution of dwelling type by dwelling size, 2021 Census data was utilised. It is assumed that the distribution of dwelling type by dwelling size will remain consistent across the projection period.

In 2021, the distribution of housing stock in Douglas Shire was dominated by separate houses, as illustrated in Table 7-4. Across Douglas Shire, separate houses comprised majority of medium and large dwellings, but only 27.5% of small dwellings. Separate houses were the dominant housing type

within the small dwellings of Port Douglas SA2 but represented only 18.6% of Daintree SA2's small housing stock. Instead, the dominant housing type of small dwellings in Daintree SA2 were semi-detached dwellings.

Table 7-4 Distribution of Housing Stock – Douglas Shire, 2021

	Separate House	Semi-detached	Attached	Other	Total
Port Douglas SA2					
Small	58.4%	18.0%	23.6%	0.0%	100.0%
Medium	99.4%	0.6%	0.0%	0.0%	100.0%
Large	100.0%	0.0%	0.0%	0.0%	100.0%
Daintree SA2					
Small	18.6%	59.9%	21.5%	0.0%	100.0%
Medium	95.4%	4.6%	0.0%	0.0%	100.0%
Large	100.0%	0.0%	0.0%	0.0%	100.0%
Douglas Shire					
Small	27.5%	50.5%	22.0%	0.0%	100.0%
Medium	97.0%	3.0%	0.0%	0.0%	100.0%
Large	100.0%	0.0%	0.0%	0.0%	100.0%

Source: ABS Census of Population and Housing (2021)

7.4.2 Dwelling Projections by Type

To convert projected dwellings by size to projected dwellings by type, careful consideration has been given to the existing stock in Douglas Shire and how we anticipate new dwellings to be delivered in the region. We note that whilst small dwellings in Port Douglas SA2 are predominantly separate houses, it is anticipated that new small dwellings delivered in the region would most likely be either semi-detached or attached.

The assessment has made the following assumptions regarding the conversion of dwellings by size to dwellings by type:

- + Small dwellings to be delivered entirely as either attached or semi-detached product;
- + Medium dwellings to be predominately delivered as separate houses or semi-detached product, with a small allowance for medium attached dwellings in Port Douglas SA2;
- + Large dwellings to be delivered predominately as separate houses, as per the current housing stock, with a small allowance made for large semi-detached product in both SA2s.

Table 7-5 below outlines the assumed delivery of additional dwellings by typology.

Table 7-5 Assumed Distribution of Additional Dwellings – Douglas Shire, 2021-2041

	Separate House	Semi-detached	Attached	Other	Total
Port Douglas SA2					
Small	15.0%	40.0%	35.0%	0.0%	100.0%
Medium	80.0%	15.0%	5.0%	0.0%	100.0%
Large	90.0%	10.0%	0.0%	0.0%	100.0%
Daintree SA2					
Small	30.0%	50.0%	20.0%	0.0%	100.0%
Medium	87.5%	10.0%	2.5%	0.0%	100.0%
Large	95.0%	5.0%	0.0%	0.0%	100.0%

Over the projection period, it is anticipated that separate houses will remain the dominant dwelling type in Douglas Shire. The number of separate houses is anticipated to increase by 758 dwellings, from 3,690 dwellings in 2021 to 4,448 dwellings in 2041. Daintree SA2 will likely record the most significant growth in separate houses with an increase of 540 dwellings while Port Douglas SA2 will record an increase of 217 dwellings. Notably, the incidence of semi-detached dwellings will grow by 130 dwellings in Daintree SA2 and 66 dwellings in Port Douglas SA2.

Table 7-6 outlines the dwelling projections by type for Douglas Shire between 2021 to 2041.

Table 7-6 Dwelling Projections by Type – Douglas Shire, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2					
Separate House	1,499	1,541	1,598	1,654	1,716
Semi-detached	100	112	130	147	166
Attached	126	133	143	153	163
Other	0	0	0	0	0
Total	1,725	1,788	1,876	1,961	2,054
Daintree SA2					
Separate House	2,192	2,313	2,453	2,590	2,732
Semi-detached	603	634	670	704	733
Attached	194	204	216	227	237
Other	0	0	0	0	0
Total	2,988	3,149	3,337	3,519	3,683
Douglas Shire					
Separate House	3,690	3,853	4,052	4,244	4,448
Semi-detached	703	746	800	851	899
Attached	320	337	359	380	401
Other	0	0	0	0	0
Total	4,713	4,937	5,213	5,481	5,737

Source: Bull & Bear Economics Analysis (2023)

7.5 Supply Demand Balance

A comparison of the projected dwelling demand against remaining supply at the SA2 level indicates there is sufficient remaining zoned land to accommodate future dwelling growth within Douglas Shire to 2041, as summarised in Table 7-7.

Table 7-7 Supply Demand Balance (dwellings) by SA2, 2021-2041

	2021	2026	2031	2036	2041
Estimated Remaining Supply (2021)					
Port Douglas SA2	1,426	1,426	1,426	1,426	1,426
Daintree SA2	1,181	1,181	1,181	1,181	1,181
Total	2,607	2,607	2,607	2,607	2,607
Projected Demand (on 2021 levels)					
Port Douglas SA2	-	63	151	236	329
Daintree SA2	-	161	349	531	694
Total	-	224	500	767	1,024
Supply Demand Balance					
Port Douglas SA2	1,426	1,363	1,275	1,190	1,097
Daintree SA2	1,181	1,020	832	650	487
Total	2,607	2,383	2,107	1,840	1,583

Source: Bull & Bear Economics Analysis (2023)

This analysis indicates that there is sufficient remaining capacity within Port Douglas SA2 to 2041 to accommodate dwelling growth.

Further interrogation of the composition of supply within Daintree SA2 highlights there is potentially insufficient capacity to accommodate projected growth in attached typologies (i.e. semi-detached and attached dwellings) to 2041, with estimated capacity for an additional 112 dwellings within the low medium density residential, medium density residential and centres zones within vacant and underutilised sites after adjusting for the probability of each site being redeveloped in the 2021 to 2041 period. By comparison, the analysis suggests demand for 173 semi-detached and attached dwellings within the 2021 to 2041 period to meet future need.

As identified in Section 5, approvals have been granted for an additional 398 detached dwellings within Daintree SA2, with the potential for a further 204 dwellings in future stages of Daintree Horizon Estate. It is imperative for Council to encourage the delivery of semi-detached product within newer residential estates, to provide a diversity of housing options to the resident population and to assist in addressing housing affordability challenges currently faced by the region.

8 Other Considerations

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

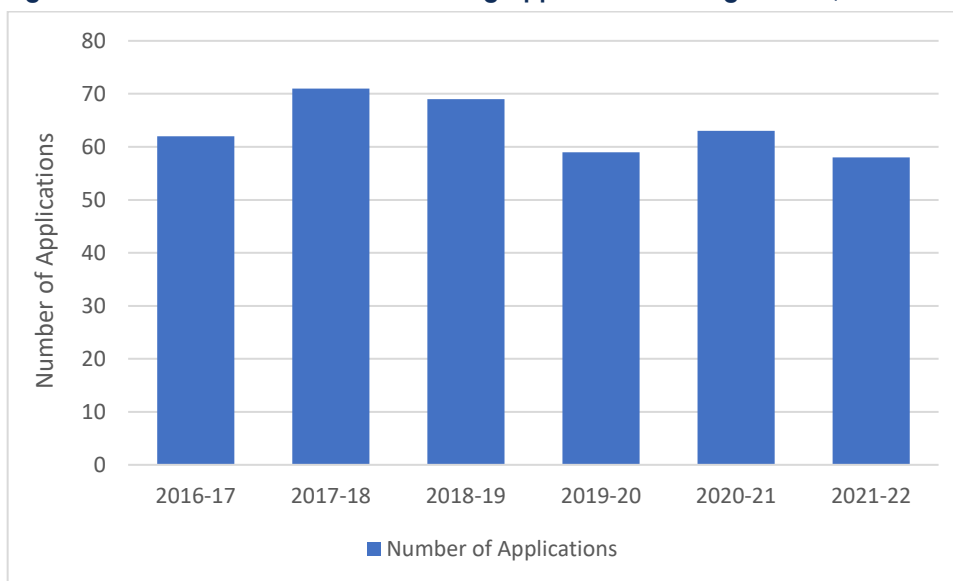
- + Social housing register statistics, based on data published on the Queensland Government Open Data Portal;
- + Estimates of the homelessness rate within the Port Douglas – Daintree SA3 relative to surrounding SA3s and Queensland; and
- + Supply of affordable rental dwellings (rental properties provided by either a state/territory provider or community housing provider), based on data published in the 2016 and 2021 Censuses of Population and Housing.

8.1 Social Housing

Housing affordability is a key factor when considering residential needs. As such, social housing in Douglas Shire has been examined. Over the past six years, the number of social housing applications has averaged 64 applications per annum, peaking in 2017-18 at 71 applications. In the most recent year, the number of social housing applications was the lowest recorded in the series.

Figure 8-1 summarises the number of applications for social housing within Douglas Shire between 2016-17 and 2021-22.

Figure 8-1 Number of Social Housing Applications – Douglas Shire, 2016-17 to 2021-22

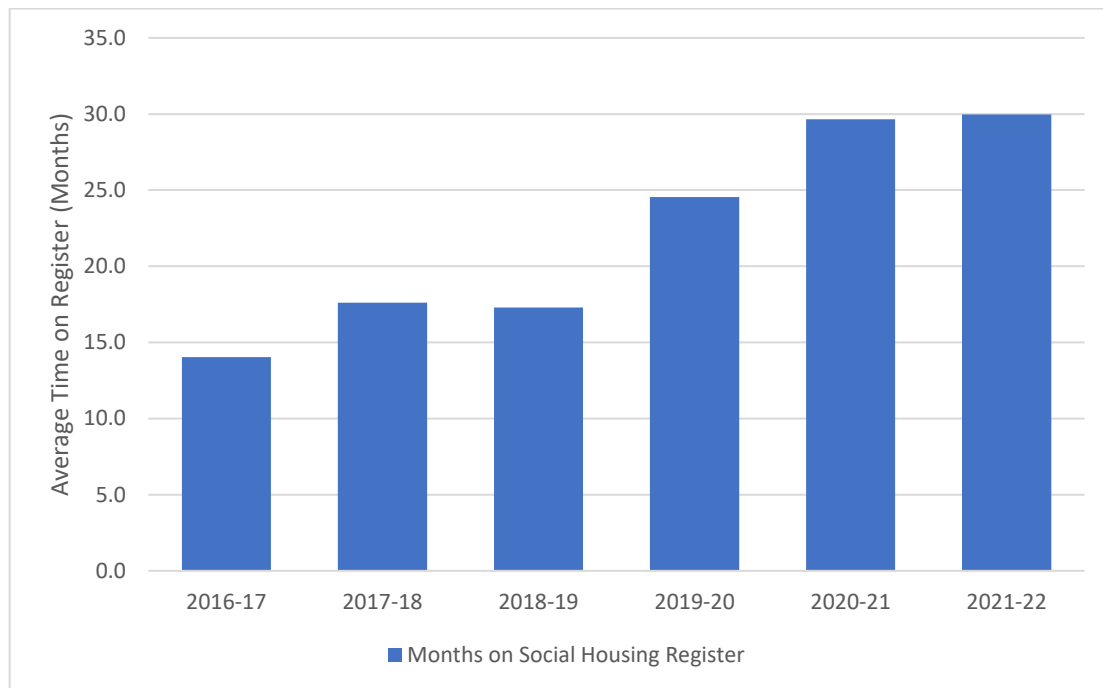


Source: Queensland Government Social Housing Register (2023)

Over the past five years, the average time spent on the social housing register for applications lodged for Douglas Shire has increased, reaching 30.0 months (or 2.5 years) in 2021-22. This indicates there is an increasing challenge in finding housing for applicants, with demand exceeding supply.

Figure 8-2 summarises the average number of months spent on the social housing register between 2016-17 and 2021-22.

Figure 8-2 **Average Number of Months Spent on Social Housing Register – Douglas Shire, 2016-17 to 2021-22**

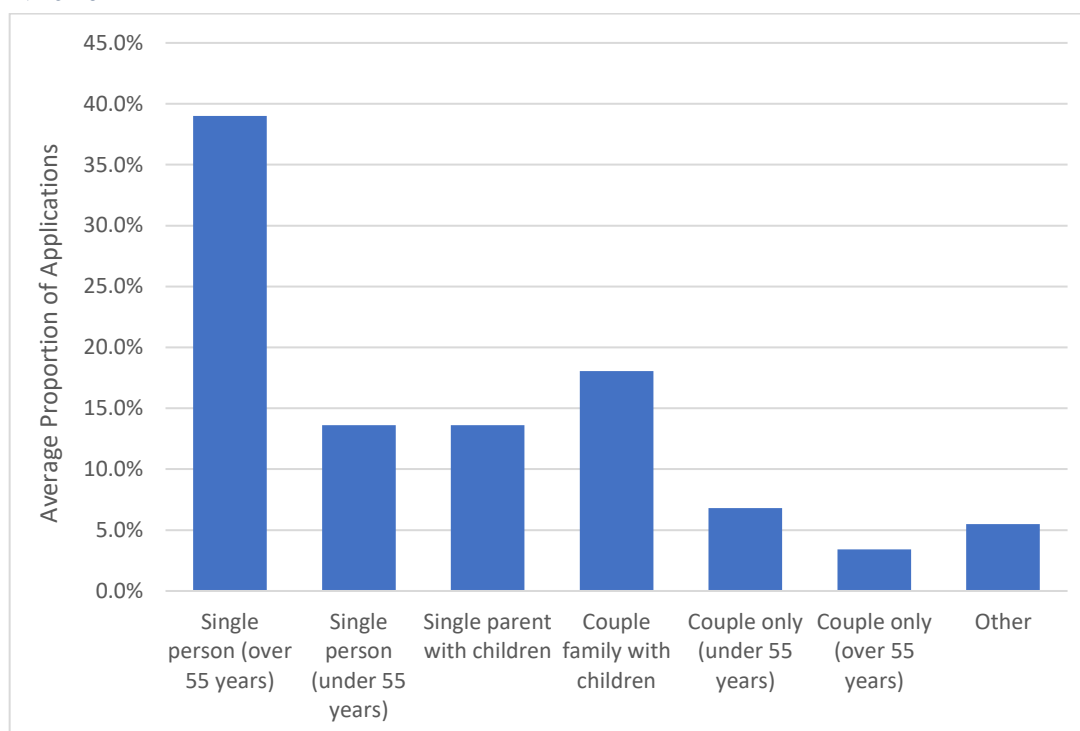


Source: Queensland Government Social Housing Register (2021)

Over the past six years, over half of all social housing applications lodged for housing in Douglas Shire were lone person households with 39.0% of these applications being for lone persons aged 55 years and older. Couple families were another significant cohort of applicants, with an average of 18.1% of applications from couple families with children.

Figure 8-3 details the distribution of social housing applications by household type between 2016-17 and 2021-22.

Figure 8-3 Household Type as an Average Proportion of Social Housing Applications – Douglas Shire, 2016-17 to 2021-22



Source: Queensland Government Social Housing Register (2021)

Applications are flagged within the Social Housing Register for particular circumstances, such as applicants requiring specific modification to social housing based on disability needs. In the two most recent years, just over half of all applications required disability modification, whilst 61.6% of applications were flagged for homelessness and disability. Notably, 51.0% of applicants were of Indigenous heritage.

Table 8-1 outlines the applications flagged in the Social Housing Register as a proportion of total applications lodged for social housing in Douglas Shire between 2020-21 and 2021-22.

Table 8-1 Flagged Applications – Douglas Shire, 2020-21 to 2021-22

	Proportion of Total Applications
Disability Modification	50.1%
Homelessness Flag	61.6%
Disability Application	61.6%
Indigenous Application	51.0%

Note: Applications can have multiple flags, hence do not add to 100%.

Disability modification was not reported prior to 2020-21

Source: Queensland Government Social Housing Register (2021)

8.2 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; and
- + Dwellings rented from a community housing provider.

Between 2016 and 2021, the proportion of affordable rental dwellings as a proportion of total dwellings within Douglas Shire increased marginally from 3.4% of total dwellings in 2016 to 3.5% of total dwellings in 2021. Meanwhile, Port Douglas SA2 recorded a decline in the proportion of affordable rental dwellings, decreasing from 2.3% of total dwellings in 2016 to 1.9% of total dwellings in 2021. However, Daintree SA2 recorded a marginal increase in affordable dwellings, increasing from 4.4% of total dwellings in 2016 to 4.8% of total dwellings in 2021. Evidently, dwellings rented from State or Territory Housing Authority's provide majority of the affordable rental dwellings in Douglas Shire.

Between 2016 and 2021, Douglas Shire as a whole recorded similar levels of affordable rental dwellings compared to Queensland. However, at the SA2 level, the proportion of affordable rental dwellings in Port Douglas SA2 is below the State average, while the proportion of affordable rental dwellings in Daintree SA2 is above the State average.

Table 8-2 details the change in proportion of affordable rental dwellings in Douglas Shire between 2016 and 2021.

Table 8-2 Affordable Rental Dwellings as a Proportion of Total Dwellings – Douglas Shire, 2016 to 2021

	Port Douglas SA2	Daintree SA2	Douglas Shire	Queensland
2016				
Community Housing	0.2%	1.5%	0.9%	0.5%
State or Territory Housing Authority	2.1%	2.9%	2.5%	3.2%
Affordable Rental Dwellings	2.3%	4.4%	3.4%	3.8%
2021				
Community Housing	0.4%	1.1%	0.8%	0.6%
State or Territory Housing Authority	1.5%	3.8%	2.8%	2.7%
Affordable Rental Dwellings	1.9%	4.8%	3.5%	3.3%
Change (% point change, 2016-21)				
Community Housing	0.2%	-0.5%	-0.1%	0.1%
State or Territory Housing Authority	-0.6%	0.9%	0.2%	-0.5%
Affordable Rental Dwellings	-0.4%	0.4%	0.1%	-0.4%

Source: Australian Bureau of Statistics Census of Population and Housing (2016 & 2022)

In 2016, over half of the affordable rental dwellings in Port Douglas SA2 and Daintree SA2 were comprised of separate houses. A further 10.3% of affordable rental dwellings in Port Douglas SA2 were comprised of semi-detached housing, while 32.8% of dwellings were flats or apartments. Comparably, 20.4% of affordable rental dwellings were comprised of semi-detached dwellings in Daintree SA2, while 25.7% of dwellings were comprised of flats or apartments.

In 2021, Port Douglas SA2 recorded a decline in the proportion of affordable rental dwellings comprised of semi-detached housing, instead recording a significant increase in affordable rental separate houses, and a smaller increase in flat / apartment dwellings. In Daintree SA2, the proportion of affordable rental dwellings comprising separate houses and semi-detached housing decreased, while the proportion of flats / apartments substantially increased. As such, in 2021 there was an equal proportion of separate houses and flat / apartments comprising affordable rental dwellings in Daintree SA2.

Table 8-3 summarises the distribution of affordable rental dwellings by dwelling type in Douglas Shire and its component SA2s between 2016 and 2021.

Table 8-3 Distribution of Affordable Rental Dwellings by Dwelling Type – Port Douglas SA2, Daintree SA2 and Douglas Shire, 2016 and 2021

	2016			2021			Change (% point)		
	Port Douglas SA2	Daintree SA2	Douglas Shire	Port Douglas SA2	Daintree SA2	Douglas Shire	Port Douglas SA2	Daintree SA2	Douglas Shire
Community Housing									
Separate House	100.0%	53.6%	64.9%	50.0%	32.4%	43.3%	-50.0%	-21.1%	-21.6%
Semi-detached Housing	0.0%	10.7%	8.1%	5.0%	0.0%	3.1%	5.0%	-10.7%	-5.0%
Flat or Apartment	0.0%	35.7%	27.0%	45.0%	67.6%	53.6%	45.0%	31.9%	26.6%
Other Dwellings	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
State or Territory Housing Authority									
Separate House	49.0%	54.1%	52.2%	68.7%	61.8%	67.6%	19.7%	7.6%	15.4%
Semi-detached Housing	12.2%	23.5%	19.4%	0.0%	14.7%	2.3%	-12.2%	-8.8%	-17.1%
Flat or Apartment	38.8%	22.4%	28.4%	31.3%	23.5%	30.0%	-7.5%	1.2%	1.7%
Other Dwellings	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Affordable Rental Dwellings									
Separate House	56.9%	54.0%	55.0%	64.0%	46.5%	60.0%	7.1%	-7.5%	5.0%
Semi-detached Housing	10.3%	20.4%	17.0%	1.3%	7.0%	2.6%	-9.1%	-13.3%	-14.4%
Flat or Apartment	32.8%	25.7%	28.1%	34.7%	46.5%	37.4%	2.0%	20.8%	9.3%
Other Dwellings	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Australian Bureau of Statistics Census of Population and Housing (2016 & 2022)

8.3 Homelessness in Douglas Shire

Another key component to consider when discussing housing affordability and residential need is the homelessness rate. The lowest level of analysis available for Homelessness data as presented by the Australian Bureau of Statistics, is at the SA3 level. As such, the relevant SA3 for Douglas Shire is the Port Douglas – Daintree SA3 which encompasses the Port Douglas SA2 and Daintree SA2 (the sum of which is referred to as Douglas Shire). In order to provide context to the homelessness rate of Douglas Shire, the homelessness rate of surrounding SA3s have also been considered.

In 2021, there has been a significant increase in the homelessness rate for Port Douglas – Daintree SA3, more than doubling, from 0.6% in 2016 to 1.3% in 2021. By comparison, the homelessness rate in comparator regions remained stable and decreased marginally in some areas between 2016 and 2021.

Table 8-4 outlines the homelessness rate for Port Douglas – Daintree SA3 and surrounding SA3s in 2016 and 2021.

Table 8-4 Homelessness Rate – Port Douglas – Daintree SA3 and Surrounding SA3s, 2016

	2016	2021
Port Douglas - Daintree	0.6%	1.3%
Cairns - North	0.4%	0.3%
Cairns - South	1.7%	1.6%
Innisfail - Cassowary Coast	3.2%	3.0%

	2016	2021
Tablelands (East) - Kuranda	1.4%	1.6%
Queensland	0.8%	0.8%

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

Homelessness is categorised by different situations (e.g. persons living in improvised dwellings tents, or sleeping out, or persons staying temporarily with other households. Between 2016 and 2021, there was an increase in the proportion of homeless persons either living in other temporary lodgings or living in other crowded dwellings.

Table 8-5 details homelessness by homelessness operation groups for Port Douglas – Daintree SA3 in 2016 and 2021.

Table 8-5 Homelessness Operational Groups – Port Douglas – Daintree SA3, 2016 and 2021

Homelessness Operational Groups	2016	2021
Persons living in improvised dwellings, tents, or sleeping out	8.0%	6.4%
Persons in supported accommodation for the homeless	0.0%	3.0%
Persons staying temporarily with other households	26.8%	20.7%
Persons living in boarding houses	6.3%	0.0%
Persons in other temporary lodgings	4.5%	10.3%
Persons living in 'severely' crowded dwellings	10.7%	9.9%
Persons living in other crowded dwellings	32.1%	37.9%
Persons in other improvised dwellings	4.5%	4.4%
Persons who are marginally housed in caravan parks	7.1%	7.4%
Total Homeless Persons	100.0%	100.0%

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

8.4 Affordable Rental Dwellings Demand

Affordable Rental Dwellings demand has been derived based on dwelling projections for Douglas Shire discussed in Section 4.2.1 and by continuing the trend of the 2021 historical proportion of affordable rental dwellings, as outlined in Table 8-2.

In 2021, there were 310 total affordable rental dwellings in Douglas Shire, with 71 dwellings located in Port Douglas SA2 and 239 dwellings located in Daintree SA2. It is expected that Port Douglas SA2 will record an increasing incidence in social housing demand, while Daintree SA2 will record a decreasing incidence in social housing demand. As such, by 2041 it is anticipated that there will be a total demand for 194 social housing dwellings in Douglas Shire, with 95 dwellings to be located in Port Douglas SA2 and 99 dwellings to be located in Daintree SA2. Although the historical proportion of social housing dwellings has been applied at the local government area level, social housing demand is expected to grow in Port Douglas SA2 due to the high average annual growth rate of the dwelling projections (i.e., 1.4% per annum). Comparatively, Daintree SA2 has a dwelling projection growth rate of 0.5% per annum.

Table 8-6 details the projected number of social housing dwellings demanded in Douglas Shire between 2021 and 2041.

Table 8-6 Affordable Rental Dwellings Demand – Douglas Shire by SA2, 2021 to 2041

	2021	2026	2031	2036	2041
Port Douglas SA2	71	76	82	89	95
Daintree SA2	239	92	94	97	99
Douglas Shire	310	168	177	186	194

Source: Bull & Bear Economics Estimates (2022)

8.5 Accommodating the Seasonal Workforce

The Douglas Shire economy is reliant on the seasonal workforce within the tourism and hospitality sector to fill job vacancies during the peak season (typically April to October of each year according to Tourism Port Douglas Daintree). Historically, the seasonal workforce has utilised affordable options such as backpackers accommodation during their stay.

There are four backpacker/hostel accommodation facilities in Port Douglas, namely:

- + Port Douglas Backpackers;
- + Dougies Backpackers Resort;
- + Global Backpackers Port Douglas; and
- + Coral Beach Lodge.

In addition, Tourism Port Douglas Daintree has been championing the Adopt A Worker initiative. This initiative asks the Douglas community to adopt a worker during the peak tourism season, in recognition of the rental crisis, recognising private rentals at present are often unaffordable for visa holders. The take-up of this program to date is unclear.

The seasonal workforce comprises both Australian and overseas visitors, with overseas visitors holding a Work and Holiday visa (either Subclass 417 or 462 depending on country of origin). The Australian Government Department of Home Affairs publishes a bi-annual report which details the quantum of Work and Holiday visas granted, but does not provide further detail regarding where these persons ultimately find employment.

A review of employment data at the SA4 level, the finest grain at which quarterly employment data by industry is available, provides insights into the potential size of the seasonal workforce within the hospitality sector, which for the purposes of this assessment has been defined as the accommodation and food services sector. The difference between the lowest and peak employment in each year has varied between ~1,100 workers and 3,200 workers in the 2012 to 2022 period, with the variance in employment by quarter most significant in 2022 at 3,214 persons.

Table 8-7 Difference between Peak and Lowest Employment by Year, Cairns SA4, 2012-2022

	Cairns SA4
2012	1,441
2013	1,294
2014	1,516
2015	2,469
2016	2,707
2017	2,544
2018	1,535
2019	1,101
2020	1,477
2021	1,586
2022	3,214

Source: ABS Labour Force, Detailed, April 2023

Douglas Shire accounted for 9% of total employment within the accommodation and food services sector in Far North Queensland in 2021-22. Applying this incidence to workforce estimates presented in Table 8-7 above suggests at a minimum, approximately 100 to 300 workers within the hospitality sector have been required to fill gaps during peak employment periods.

8.6 Key Findings

It is evident that homelessness within the broader Port Douglas – Daintree SA3 is increasing, with the proportion of persons classified as homeless more than doubling between the 2016 and 2021 Census. In terms of homelessness operational groups, the most significant classification of homelessness in Port Douglas – Daintree SA3 was persons living in other crowded dwellings (37.9% of homeless persons or 77 persons). Persons living in crowded dwellings typically refers to usual residents of dwellings which need four or more extra bedrooms to accommodate the residents adequately. This cohort also recorded the most significant increase between 2016 and 2021 and likely reflects rent increases significantly exceeding wage increases in this period.

As such, it is evident that by addressing housing affordability and the expected increase in social housing demand, there is opportunity to address this form of homelessness and decrease overcrowding in Douglas Shire. Moreover, the most significant age cohort of persons living in social housing are persons aged 20 to 24 years, as outlined in Table 8-8.

Younger people would be more vulnerable to housing issues when they have had limited opportunity to save or acquire sustainable work which could support their basic needs. Furthermore, median weekly rents in tourist localities such as Port Douglas for small dwellings can be high due to the letting of small dwellings to the short term accommodation market, as opposed to the residential rental market. The impact of this is there is restricted supply of small dwellings, pushing up weekly rents and hence worsening rental affordability.

As such, by examining homelessness and affordable rental dwellings data, it is clear that there are opportunities to address affordable rental dwellings through the improvement of housing affordability. In 2021, the most common type of dwellings rented from a State or Territory housing authority in Douglas Shire was separate houses. It would be beneficial for Douglas Shire if affordable rental dwellings in Douglas Shire were restructured towards semi-attached (townhouses) or attached housing (apartments) would have lower maintenance costs than separate housing and would require less space, meaning that more vulnerable persons could have access to affordable housing.

As mentioned in Section 8.1, the most significant cohorts requiring social housing are lone and single parent households, with particular emphasis on persons aged 55 year and older for lone person households. As such, Council should consider housing affordability for the older population, given 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. An increase in affordable semi-attached or attached rental dwellings and a decrease in separate dwellings may assist in this issue.

The seasonal workforce in Douglas Shire is significant, with high level estimates suggesting the seasonal workforce has been between 100 and 300 persons in the hospitality sector.

Table 8-8 Age Distribution of Persons Residing in Affordable Rental Dwellings – Douglas Shire, 2016

	Port Douglas SA2	Daintree SA2	Douglas Shire
0-4 years	0.0%	6.4%	5.1%
5-9 years	3.4%	8.6%	7.5%
10-14 years	6.7%	9.2%	8.7%
15-19 years	3.4%	5.5%	5.1%
20-24 years	10.1%	6.4%	7.2%
25-29 years	0.0%	5.5%	4.3%
30-34 years	5.6%	8.6%	8.0%
35-39 years	3.4%	8.0%	7.0%
40-44 years	4.5%	6.7%	6.3%
45-49 years	6.7%	7.4%	7.2%
50-54 years	10.1%	7.1%	7.7%
55-59 years	0.0%	6.4%	5.1%
60-64 years	9.0%	6.4%	7.0%
65 years and older	37.1%	7.7%	14.0%

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

9 Summary

Our assessment of the residential characteristics of the Douglas Shire community has identified the following:

- + Port Douglas and Craiglie are characterised by a significant proportion of dwellings currently being utilised for short term accommodation. Our assessment has identified that approximately 60% of the housing stock in select SA1s in Port Douglas and Craiglie are not available to the long term housing market in Douglas Shire. The implication of this finding is that the stock of small dwellings available for the residential population is likely lower than suggested by Census data;
- + Douglas Shire is characterised by housing stock that is predominantly detached dwellings outside of Port Douglas. Interestingly, a significant proportion of small dwellings (1-2 bedroom) in Port Douglas SA2 are detached dwellings, as opposed to attached dwellings. It is anticipated that additional small dwellings delivered within the region are more likely to be semi-detached or small lot housing, as opposed to detached product, reflective of broader market trends;
- + Our analysis has identified that there remains sufficient capacity to accommodate population and dwelling growth within Douglas Shire to 2041, through the delivery of approved residential subdivision and the take-up of englobo residential zoned land. It is noted that there are no approvals for attached dwelling development in Douglas Shire, with the focus on delivering low density residential and rural residential allotments;
- + Within Daintree SA2, it is noted that there is very limited opportunity within remaining zoned land to deliver semi attached and attached residential product. It is suggested that delivery of a diversity of housing types is encouraged within new residential subdivisions, as opposed to only detached dwellings, to provide increased housing choice and product at varying price points;
- + To date there has been relatively little provision of retirement living and aged care facilities within Douglas Shire. Our assessment identifies there is likely opportunity for a small scale retirement living facility within the region and the delivery of additional aged care beds. In determining the appropriate location for retirement living within the region, it is imperative that a site is within proximity to services and facilities, with suitable sites typically on the fringe of existing communities;
- + The incidence of the dwelling stock which represents community and public housing in Douglas Shire is significantly higher in Daintree SA2 than Port Douglas SA2. The data indicates that affordable dwellings are in highest demand for single persons aged 55 years and over and persons who have a disability or require disability modification. The incidence of homelessness within the broader region is significantly lower than comparator regions, indicative of a range of housing options to support the needs of the community; and
- + Whilst detached dwellings are anticipated to remain the dominant housing type in Douglas Shire, the analysis also identifies a growing need to deliver small dwellings, which are likely to represent a mix of semi-attached and attached product. There may be an opportunity for Council to incentivise or encourage the delivery of small dwellings to service the needs of the local community, as opposed to the short term accommodation market, to enhance housing affordability for essential workers. This trend is particularly apparent in Daintree SA2, which is anticipated to require an additional 173 attached dwellings by 2041. It is suggested that Council consider incentivising the delivery of attached product in new residential estates, as opposed to delivering only detached dwellings.

10 Appendix

10.1 Appendix A Property Market Overview

Table 10-1 Volume of Detached Dwelling Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Wonga Beach	0	0	0	21	25	20	10	19	44	39	178
Port Douglas	45	52	40	50	47	43	34	34	60	54	459
Craiglie	16	19	22	16	22	27	9	12	30	24	197
Mossman	15	29	25	29	35	28	31	27	34	40	293
Rocky Point	5	0	5	3	6	1	0	3	4	4	31
Mowbray	3	3	4	6	13	8	4	3	11	9	64
Cooya Beach	12	16	15	11	17	12	9	10	19	7	128
Forest Creek	5	1	1	5	0	3	4	2	6	5	32
Newell	10	0	9	6	9	6	5	9	15	12	81
Whyanbeel	2	2	2	1	7	0	2	2	6	4	28
Pringle	0	0	0	0	0	0	0	0	0	0	0
Shannonvale	1	2	1	2	2	1	2	3	8	3	25
Oak Beach	4	3	7	4	6	5	6	3	6	5	49
Cape Tribulation	1	1	3	2	3	0	1	2	2	4	19
Bamboo	2	3	1	1	1	3	1	1	2	3	18
Bonnie Doon	5	11	10	9	13	19	13	12	20	15	127
Diwan	10	3	5	2	4	5	2	1	6	9	47
Daintree	1	1	3	2	1	4	3	1	2	5	23
Cow Bay	13	3	10	9	2	10	6	7	19	15	94
Miallo	3	7	5	5	5	4	3	6	7	8	53
Cassowary	2	0	2	0	0	1	0	0	0	1	6
Kimberley	2	4	1	0	1	0	2	2	1	2	15
Mossman Gorge	1	4	2	3	6	3	4	4	4	5	36
Lower Daintree	0	2	4	0	2	1	1	2	0	1	13
Wangetti	1	1	1	2	0	0	1	1	2	1	10
Thornton Beach	0	0	1	0	2	0	0	1	1	1	6
Stewart Creek Valley	0	0	0	0	0	0	0	0	0	2	2
Killaloe	4	4	2	3	0	0	1	2	4	1	21
Finlayvale	0	0	1	0	0	0	1	0	2	0	4
Upper Daintree	0	0	0	0	0	0	0	0	0	0	0
Degarra	0	0	0	0	1	0	0	0	0	0	1
Wonga	21	21	25	0	0	0	0	0	0	0	67
Douglas Shire	184	192	207	192	230	204	155	169	315	279	2,127

Source: PriceFinder (2022)

Table 10-2 Value of Detached Residential Land Sales (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Wonga Beach	\$0.00	\$0.00	\$0.00	\$7.18	\$8.36	\$6.46	\$2.62	\$6.93	\$14.84	\$16.35	\$62.73
Port Douglas	\$23.04	\$28.34	\$25.25	\$33.73	\$57.22	\$25.91	\$25.69	\$27.75	\$71.07	\$63.28	\$381.30
Craiglie	\$7.57	\$8.96	\$11.73	\$8.24	\$11.05	\$17.64	\$5.13	\$6.54	\$19.48	\$19.48	\$115.81
Mossman	\$3.49	\$8.18	\$7.17	\$9.81	\$9.28	\$8.51	\$11.08	\$8.50	\$11.54	\$15.49	\$93.07
Rocky Point	\$1.89	\$0.00	\$1.75	\$1.32	\$2.91	\$0.38	\$0.00	\$1.78	\$2.95	\$2.81	\$15.78
Mowbray	\$1.30	\$1.42	\$2.42	\$3.13	\$7.69	\$4.47	\$2.83	\$2.04	\$8.56	\$10.25	\$44.10
Cooya Beach	\$3.30	\$4.70	\$5.22	\$3.39	\$5.28	\$3.97	\$3.03	\$3.39	\$7.18	\$3.45	\$42.91
Forest Creek	\$1.15	\$0.20	\$0.22	\$1.53	\$0.00	\$0.59	\$1.37	\$0.49	\$2.02	\$1.89	\$9.45
Newell	\$4.51	\$0.00	\$3.26	\$2.22	\$5.28	\$2.36	\$2.59	\$4.53	\$6.69	\$6.29	\$37.73
Whyanbeel	\$0.93	\$1.00	\$0.71	\$0.34	\$3.75	\$0.00	\$1.12	\$0.75	\$3.27	\$2.93	\$14.78
Pringle	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shannonvale	\$0.36	\$1.36	\$0.28	\$0.90	\$0.97	\$0.50	\$1.24	\$2.47	\$5.42	\$2.58	\$16.07
Oak Beach	\$2.25	\$3.05	\$5.59	\$3.25	\$4.73	\$4.06	\$7.74	\$1.74	\$5.04	\$3.97	\$41.39
Cape Tribulation	\$0.31	\$0.43	\$1.25	\$0.44	\$4.55	\$0.00	\$0.28	\$1.16	\$0.50	\$2.54	\$11.44
Bamboo	\$0.80	\$1.41	\$0.70	\$0.45	\$0.35	\$1.43	\$0.35	\$0.67	\$1.44	\$2.12	\$9.71
Bonnie Doon	\$1.58	\$4.00	\$4.46	\$3.44	\$5.24	\$7.40	\$5.30	\$4.73	\$9.20	\$8.49	\$53.84
Diwan	\$2.73	\$0.78	\$1.60	\$0.54	\$1.19	\$1.59	\$0.54	\$0.34	\$1.99	\$2.94	\$14.22
Daintree	\$0.46	\$0.15	\$0.95	\$0.50	\$0.20	\$1.02	\$1.34	\$0.26	\$0.60	\$2.87	\$8.33
Cow Bay	\$3.03	\$1.20	\$2.90	\$2.59	\$1.01	\$2.35	\$0.97	\$2.11	\$6.99	\$6.65	\$29.80
Miallo	\$1.23	\$2.26	\$1.74	\$2.36	\$2.64	\$1.67	\$1.75	\$2.53	\$6.01	\$5.74	\$27.91
Cassowary	\$0.87	\$0.00	\$1.11	\$0.00	\$0.00	\$0.54	\$0.00	\$0.00	\$0.00	\$0.40	\$2.91
Kimberley	\$0.31	\$1.37	\$0.20	\$0.00	\$0.27	\$0.00	\$0.77	\$0.78	\$0.65	\$0.78	\$5.11
Mossman Gorge	\$0.43	\$1.51	\$0.72	\$1.08	\$3.16	\$1.69	\$2.28	\$2.11	\$2.18	\$3.56	\$18.70
Lower Daintree	\$0.00	\$0.53	\$1.51	\$0.00	\$0.74	\$0.35	\$0.35	\$0.46	\$0.00	\$0.69	\$4.62
Wangetti	\$0.21	\$0.39	\$0.48	\$0.71	\$0.00	\$0.00	\$0.30	\$0.19	\$0.66	\$0.40	\$3.35
Thornton Beach	\$0.00	\$0.00	\$0.30	\$0.00	\$0.60	\$0.00	\$0.00	\$0.45	\$0.30	\$0.39	\$2.04
Stewart Creek Valley	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.26	\$1.26
Killaloe	\$1.52	\$3.09	\$1.92	\$2.36	\$0.00	\$0.00	\$0.39	\$1.44	\$4.28	\$0.97	\$15.96
Finlayvale	\$0.00	\$0.00	\$0.34	\$0.00	\$0.00	\$0.00	\$0.35	\$0.00	\$3.34	\$0.00	\$4.02
Upper Daintree	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Degarra	\$0.00	\$0.00	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.30
Wonga	\$6.35	\$6.04	\$7.38	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19.77
Douglas Shire	\$69.61	\$80.34	\$91.13	\$89.48	\$136.75	\$92.89	\$79.39	\$84.10	\$196.17	\$188.54	\$1,108.39

Source: PriceFinder (2022)

Table 10-3 Median Sale Price for Detached Dwellings – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Wonga Beach	-	-	-	\$330,000	\$325,000	\$296,000	\$241,000	\$345,000	\$317,500	\$390,000
Port Douglas	\$450,000	\$465,000	\$530,000	\$502,500	\$600,000	\$555,000	\$599,500	\$591,500	\$700,000	\$858,500
Craiglie	\$393,000	\$425,000	\$496,250	\$473,500	\$515,000	\$507,500	\$570,000	\$515,000	\$544,500	\$637,500
Mossman	\$236,000	\$275,000	\$271,500	\$349,000	\$255,000	\$272,500	\$365,000	\$310,000	\$343,500	\$360,000
Rocky Point	\$390,000	-	\$305,000	\$470,000	\$384,500	\$380,000	-	\$545,000	\$650,000	\$682,500
Mowbray	\$452,000	\$510,000	\$535,000	\$510,000	\$490,000	\$502,500	\$705,000	\$565,000	\$615,000	\$1,100,000
Cooya Beach	\$257,500	\$296,500	\$320,000	\$300,000	\$315,000	\$315,000	\$330,000	\$325,000	\$345,000	\$405,000
Forest Creek	\$210,000	\$200,000	\$220,000	\$250,000	-	\$120,000	\$315,000	\$245,000	\$350,000	\$390,000
Newell	\$382,500	-	\$370,000	\$367,750	\$450,000	\$383,750	\$435,000	\$360,000	\$390,000	\$525,000
Whyanbeel	\$465,000	\$502,000	\$355,000	\$335,000	\$500,000	-	\$557,500	\$372,500	\$485,000	\$787,500
Pringle	-	-	-	-	-	-	-	-	-	-
Shannonvale	\$360,000	\$677,500	\$280,000	\$447,500	\$484,000	\$500,000	\$622,000	\$700,000	\$720,000	\$830,000
Oak Beach	\$537,500	\$650,000	\$540,500	\$537,500	\$720,000	\$565,000	\$832,500	\$600,000	\$752,500	\$705,000
Cape Tribulation	\$310,000	\$425,000	\$450,000	\$220,000	\$329,000	-	\$275,000	\$580,000	\$247,500	\$562,500
Bamboo	\$397,500	\$475,000	\$700,000	\$445,000	\$353,000	\$407,000	\$350,000	\$670,000	\$720,000	\$760,000
Bonnie Doon	\$310,000	\$360,000	\$415,000	\$377,000	\$395,000	\$380,000	\$420,000	\$383,000	\$450,000	\$585,000
Diwan	\$230,000	\$260,000	\$250,000	\$270,000	\$290,000	\$285,000	\$269,500	\$338,000	\$285,000	\$260,000
Daintree	\$464,000	\$150,000	\$262,500	\$250,000	\$200,000	\$192,500	\$470,000	\$255,000	\$297,500	\$595,000
Cow Bay	\$249,000	\$247,500	\$287,000	\$285,000	\$502,500	\$222,500	\$172,500	\$291,075	\$285,000	\$430,000
Miallo	\$410,000	\$365,000	\$330,000	\$440,000	\$540,000	\$308,750	\$575,000	\$457,500	\$579,000	\$562,500
Cassowary	\$432,500	-	\$555,000	-	-	\$537,500	-	-	-	\$400,000
Kimberley	\$152,500	\$337,500	\$200,000	-	\$265,000	-	\$385,000	\$387,500	\$650,000	\$387,500
Mossman Gorge	\$430,000	\$385,000	\$357,500	\$350,000	\$505,500	\$600,000	\$512,500	\$507,500	\$517,500	\$820,000
Lower Daintree	-	\$265,000	\$376,250	-	\$367,500	\$350,000	\$350,000	\$230,000	-	\$685,000
Wangetti	\$211,750	\$390,000	\$480,000	\$356,500	-	-	\$300,000	\$190,000	\$330,935	\$400,000
Thornton Beach	-	-	\$300,000	-	\$299,000	-	-	\$450,000	\$300,000	\$390,000
Stewart Creek Valley	-	-	-	-	-	-	-	-	-	\$630,000
Killaloe	\$366,000	\$795,000	\$959,000	\$850,000	-	-	\$385,000	\$720,000	\$1,132,500	\$974,000
Finlayvale	-	-	\$335,000	-	-	-	\$345,000	-	\$1,667,500	-
Upper Daintree	-	-	-	-	-	-	-	-	-	-
Degarra	-	-	-	-	\$300,000	-	-	-	-	-
Wonga	\$248,000	\$295,000	\$287,500	-	-	-	-	-	-	-
Douglas Shire	\$345,000	\$382,500	\$380,000	\$405,000	\$412,500	\$420,000	\$431,000	\$420,000	\$469,000	\$570,000

Source: PriceFinder (2022)

Table 10-4 Volume of Attached Dwelling Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Port Douglas	295	233	248	274	304	300	226	230	376	411	2,897
Cooya Beach	0	2	0	0	1	0	1	3	0	3	10
Craiglie	18	21	17	34	16	21	20	13	30	29	219
Miallo	0	1	1	1	1	1	0	1	3	1	10
Mossman	1	2	2	4	3	2	2	2	0	9	27
Wonga Beach	1	1	0	0	0	0	1	0	3	1	7
Newell	6	0	3	0	0	1	0	2	1	0	13
Douglas Shire	321	260	271	313	325	325	250	251	413	454	3,183

Source: PriceFinder (2022)

Table 10-5 Value of Attached Dwelling Sales (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Port Douglas	\$84.60	\$83.28	\$84.99	\$88.66	\$116.83	\$104.70	\$80.13	\$83.43	\$177.02	\$198.16	\$1,101.79
Cooya Beach	\$0.00	\$0.49	\$0.00	\$0.00	\$0.21	\$0.00	\$0.19	\$0.38	\$0.00	\$0.79	\$2.05
Craiglie	\$4.38	\$5.15	\$6.00	\$9.49	\$3.54	\$4.71	\$5.48	\$2.77	\$10.14	\$10.41	\$62.08
Miallo	\$0.00	\$0.18	\$0.17	\$0.10	\$0.13	\$0.18	\$0.00	\$0.17	\$0.51	\$0.22	\$1.64
Mossman	\$0.09	\$0.72	\$0.18	\$1.39	\$0.55	\$0.27	\$0.54	\$0.78	\$0.00	\$1.09	\$5.59
Wonga Beach	\$0.18	\$0.15	\$0.00	\$0.00	\$0.00	\$0.00	\$0.84	\$0.00	\$0.87	\$0.35	\$2.38
Newell	\$0.98	\$0.00	\$0.67	\$0.00	\$0.00	\$0.17	\$0.00	\$0.40	\$0.23	\$0.00	\$2.45
Douglas Shire	\$90.23	\$89.96	\$92.01	\$100.66	\$121.73	\$110.03	\$87.97	\$87.92	\$189.75	\$211.01	\$1,181.28

Source: PriceFinder (2022)

Table 10-6 Median Sale Price for Attached Dwellings (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2022-22
Port Douglas	\$0.20	\$0.25	\$0.23	\$0.23	\$0.26	\$0.23	\$0.24	\$0.27	\$0.30	\$0.32
Cooya Beach	-	\$0.24	-	-	\$0.21	-	\$0.19	\$0.13	-	\$0.29
Craiglie	\$0.20	\$0.21	\$0.29	\$0.16	\$0.19	\$0.23	\$0.17	\$0.15	\$0.21	\$0.24
Miallo	-	\$0.18	\$0.17	\$0.10	\$0.13	\$0.18	-	\$0.17	\$0.16	\$0.22
Mossman	\$0.09	\$0.36	\$0.09	\$0.35	\$0.16	\$0.14	\$0.27	\$0.39	-	\$0.14
Wonga Beach	\$0.18	\$0.15	-	-	-	-	\$0.84	-	\$0.21	\$0.35
Newell	\$0.17	-	\$0.20	-	-	\$0.17	-	\$0.20	\$0.23	-
Douglas Shire	\$0.20	\$0.24	\$0.23	\$0.22	\$0.25	\$0.23	\$0.24	\$0.26	\$0.29	\$0.31

Source: PriceFinder (2022)

Table 10-7 Volume of Vacant Residential Land Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Daintree	1	1	1	0	1	1	1	0	3	3	12
Wonga Beach	0	0	0	8	12	12	8	6	17	24	87
Mossman	7	6	8	5	4	6	1	2	5	3	47
Diwan	2	3	2	1	1	1	3	3	3	3	22
Craiglie	9	21	13	22	25	11	0	3	24	17	145
Degarra	0	1	1	0	0	0	0	2	3	3	10
Stewart Creek Valley	0	0	0	0	0	0	0	1	0	2	3
Bonnie Doon	14	24	18	17	9	22	8	6	22	14	154
Miallo	0	0	1	1	0	0	0	0	0	0	2
Oak Beach	2	4	4	0	0	2	0	1	3	1	17
Bamboo	0	2	0	1	1	0	0	0	0	4	8
Cow Bay	4	5	6	8	8	9	4	4	11	7	66
Port Douglas	6	5	7	3	11	7	2	1	9	13	64
Rocky Point	0	0	0	1	1	1	0	0	3	4	10
Forest Creek	7	5	4	5	4	3	6	4	4	5	47
Mowbray	1	2	2	2	1	1	4	1	1	1	16
Kimberley	2	1	2	1	1	2	1	2	1	2	15
Lower Daintree	0	1	1	0	0	1	1	1	3	2	10
Newell	0	0	0	0	0	1	0	0	0	1	2
Cape Tribulation	4	0	2	0	0	0	1	0	1	1	9
Cooya Beach	1	2	3	4	5	2	1	1	4	0	23
Whyanbeel	0	1	0	0	0	0	1	0	2	0	4
Finlayvale	0	0	0	0	1	0	1	1	0	0	3
Mossman Gorge	0	0	2	0	1	1	0	0	0	0	4
Shannonvale	1	2	1	2	2	0	0	0	0	0	8
Thornton Beach	1	0	0	1	0	0	0	0	0	0	2
Wangetti	0	0	0	1	0	0	0	0	0	0	1
Killaloe	0	1	0	1	0	0	0	0	0	0	2
Cassowary	0	0	0	1	0	0	0	0	0	0	1
Wonga	2	7	4	0	0	0	0	0	0	0	13
Douglas Shire	64	94	82	85	88	83	43	39	119	110	807

Source: PriceFinder (2022)

Table 10-8 Value of Vacant Residential Land Sales (\$m) – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Daintree	\$0.16	\$0.12	\$0.07	\$0.00	\$0.13	\$0.13	\$0.08	\$0.00	\$0.29	\$0.36	\$1.33
Wonga Beach	\$0.00	\$0.00	\$0.00	\$1.23	\$2.03	\$1.24	\$0.68	\$0.83	\$2.18	\$3.36	\$11.55
Mossman	\$5.01	\$0.89	\$1.11	\$0.52	\$0.45	\$1.25	\$0.09	\$0.34	\$0.99	\$0.45	\$11.11
Diwan	\$0.15	\$0.29	\$0.17	\$0.09	\$0.09	\$0.11	\$0.47	\$0.50	\$0.32	\$0.76	\$2.92
Craiglie	\$2.04	\$4.87	\$2.60	\$4.29	\$5.30	\$7.42	\$0.00	\$0.81	\$6.21	\$5.29	\$38.82
Degarra	\$0.00	\$0.18	\$0.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.19	\$0.27	\$1.16	\$1.96
Stewart Creek Valley	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.10	\$0.00	\$0.64	\$0.74
Bonnie Doon	\$1.29	\$2.36	\$2.04	\$2.16	\$1.17	\$3.17	\$1.29	\$0.96	\$3.74	\$2.55	\$20.72
Miallo	\$0.00	\$0.00	\$0.27	\$0.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.55
Oak Beach	\$0.55	\$1.17	\$1.20	\$0.00	\$0.00	\$0.78	\$0.00	\$0.29	\$0.89	\$0.46	\$5.32
Bamboo	\$0.00	\$0.53	\$0.00	\$0.21	\$0.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.96	\$1.90
Cow Bay	\$0.36	\$0.48	\$0.62	\$0.95	\$0.67	\$0.69	\$0.31	\$0.15	\$1.27	\$0.69	\$6.18
Port Douglas	\$2.05	\$2.17	\$2.87	\$1.32	\$8.47	\$3.07	\$10.51	\$0.33	\$4.98	\$15.87	\$51.64
Rocky Point	\$0.00	\$0.00	\$0.00	\$0.11	\$0.10	\$0.27	\$0.00	\$0.00	\$0.84	\$1.97	\$3.28
Forest Creek	\$0.59	\$0.44	\$0.33	\$0.53	\$0.38	\$0.28	\$0.50	\$0.39	\$0.61	\$0.82	\$4.86
Mowbray	\$0.21	\$0.76	\$0.48	\$0.58	\$0.38	\$0.40	\$1.94	\$0.77	\$0.34	\$0.36	\$6.21
Kimberley	\$0.12	\$0.12	\$0.19	\$0.07	\$0.08	\$0.13	\$0.09	\$0.17	\$0.20	\$0.19	\$1.34
Lower Daintree	\$0.00	\$0.11	\$0.20	\$0.00	\$0.00	\$0.15	\$0.16	\$0.09	\$0.44	\$0.39	\$1.54
Newell	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.35	\$0.00	\$0.00	\$0.00	\$0.25	\$0.60
Cape Tribulation	\$0.76	\$0.00	\$0.61	\$0.00	\$0.00	\$0.00	\$0.15	\$0.00	\$0.15	\$0.15	\$1.81
Cooya Beach	\$0.15	\$0.17	\$0.30	\$0.42	\$0.60	\$0.24	\$0.13	\$0.13	\$0.82	\$0.00	\$2.95
Whyanbeel	\$0.00	\$0.38	\$0.00	\$0.00	\$0.00	\$0.00	\$0.25	\$0.00	\$0.56	\$0.00	\$1.18
Finlayvale	\$0.00	\$0.00	\$0.00	\$0.00	\$0.29	\$0.00	\$0.31	\$0.30	\$0.00	\$0.00	\$0.90
Mossman Gorge	\$0.00	\$0.00	\$0.15	\$0.00	\$0.11	\$0.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.36
Shannonvale	\$0.26	\$0.43	\$0.26	\$0.51	\$0.51	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.97
Thornton Beach	\$0.27	\$0.00	\$0.00	\$0.16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.42
Wangetti	\$0.00	\$0.00	\$0.00	\$0.16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.16
Killaloe	\$0.00	\$0.22	\$0.00	\$0.27	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.49
Cassowary	\$0.00	\$0.00	\$0.00	\$0.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.17
Wonga	\$0.54	\$0.67	\$0.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.70
Douglas Shire	\$14.48	\$16.34	\$14.13	\$13.99	\$20.97	\$19.76	\$16.94	\$6.32	\$25.05	\$36.67	\$184.65

Source: PriceFinder (2022)

Table 10-9 Median sale Price per Square Metre for Vacant Residential Land Sales – Suburbs within Douglas Shire, 2012-13 to 2021-22

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Total
Daintree	\$4.76	\$1.40	\$64.23	-	\$43.66	\$3.86	\$79.05	-	\$46.96	\$48.94	\$45.31
Wonga Beach	-	-	-	\$134.45	\$89.65	\$88.30	\$86.44	\$105.20	\$96.07	\$132.75	\$99.82
Mossman	\$144.51	\$147.44	\$144.88	\$106.72	\$74.48	\$141.62	\$98.58	\$57.80	\$91.90	\$150.05	\$126.62
Diwan	\$7.13	\$3.67	\$6.53	\$7.66	\$5.71	\$7.97	\$11.90	\$5.54	\$1.17	\$3.85	\$5.83
Craiglie	\$211.41	\$209.95	\$229.56	\$245.64	\$270.45	\$100.05	-	\$342.23	\$342.86	\$368.00	\$252.17
Degarra	-	\$3.22	\$1.99	-	-	-	-	\$2.23	\$1.61	\$2.34	\$1.96
Stewart Creek Valley	-	-	-	-	-	-	-	\$2.41	-	\$5.29	\$3.25
Bonnie Doon	\$113.65	\$123.52	\$124.00	\$172.89	\$165.28	\$172.76	\$177.00	\$195.07	\$253.13	\$266.43	\$170.00
Miallo	-	-	\$19.75	\$15.70	-	-	-	-	-	-	\$8.71
Oak Beach	\$421.21	\$182.41	\$37.44	-	-	\$53.32	-	\$477.76	\$481.88	\$757.83	\$204.07
Bamboo	-	\$25.93	-	\$44.47	\$42.19	-	-	-	-	\$49.32	\$44.23
Cow Bay	\$8.39	\$9.50	\$9.73	\$8.83	\$7.19	\$7.50	\$8.50	\$2.50	\$9.98	\$10.00	\$8.80
Port Douglas	\$325.89	\$369.57	\$320.15	\$362.50	\$444.88	\$373.13	\$303.04	\$418.81	\$869.57	\$1,000.00	\$444.99
Rocky Point	-	-	-	\$89.17	\$10.25	\$21.51	-	-	\$54.89	\$87.34	\$68.55
Forest Creek	\$5.83	\$3.44	\$3.57	\$2.71	\$3.53	\$3.86	\$4.22	\$4.95	\$4.76	\$8.96	\$4.27
Mowbray	\$35.05	\$11.51	\$45.18	\$64.06	\$13.69	\$92.79	\$9.43	\$6.23	\$6.37	\$8.10	\$13.74
Kimberley	\$6.94	\$5.87	\$5.33	\$6.55	\$7.31	\$4.93	\$4.96	\$5.39	\$2.23	\$9.48	\$6.40
Lower Daintree	-	\$25.72	\$2.49	-	-	\$37.50	\$33.61	\$40.15	\$25.00	\$21.85	\$25.36
Newell	-	-	-	-	-	\$576.61	-	-	-	\$311.72	\$444.16
Cape Tribulation	\$7.33	-	\$3.32	-	-	-	\$6.02	-	\$10.11	\$6.50	\$6.38
Cooya Beach	\$164.11	\$94.98	\$120.55	\$121.18	\$148.11	\$117.80	\$143.81	\$149.25	\$216.74	-	\$141.84
Whyanbeel	-	\$4.64	-	-	-	-	\$74.63	-	\$17.51	-	\$8.85
Finlayvale	-	-	-	-	\$9.12	-	\$9.59	\$9.03	-	-	\$9.12
Mossman Gorge	-	-	\$41.49	-	\$52.33	\$68.68	-	-	-	-	\$50.49
Shannonvale	\$3.88	\$28.91	\$24.10	\$16.49	\$35.78	-	-	-	-	-	\$28.06
Thornton Beach	\$263.94	-	-	\$157.11	-	-	-	-	-	-	\$210.53
Wangetti	-	-	-	\$77.19	-	-	-	-	-	-	\$77.19
Killaloe	-	\$17.73	-	\$55.73	-	-	-	-	-	-	\$36.73
Cassowary	-	-	-	\$63.49	-	-	-	-	-	-	\$63.49
Wonga	\$59.36	\$79.38	\$150.72	-	-	-	-	-	-	-	\$84.63
Douglas Shire	\$116.22	\$121.79	\$122.90	\$157.11	\$147.17	\$110.60	\$67.15	\$19.55	\$179.57	\$141.98	

Source: PriceFinder (2022)

10.2 Appendix B Vacant and Underutilised Residential Land

Table 10-10 Vacant Residential Land (Ha) without an Approval by Zone – Douglas Shire, August 2022

	Low Density Res.	Low-Medium Density Res.	Medium Density Res.	Tourist Accom.	Rural Res.	Centre Zone	Total
PORT DOUGLAS	1.8	2.7	1.7	10.3	0.0	0.7	17.2
CASSOWARY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BONNIE DOON	8.5	0.0	0.0	0.0	0.0	0.0	8.5
MOWBRAY	0.0	0.0	0.0	0.0	1.2	0.0	1.2
WANGETTI	0.5	0.0	0.0	0.0	0.0	0.0	0.5
MIALLO	0.0	0.0	0.0	0.0	0.0	0.0	0.0
STEWART CREEK VALLEY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MOSSMAN	22.6	0.7	0.0	0.0	0.0	0.2	23.5
CAPE TRIBULATION	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WONGA BEACH	9.3	0.0	0.0	0.0	42.0	0.0	51.3
BLOOMFIELD	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CRAIGLIE	41.3	0.0	1.3	0.0	0.0	0.0	42.6
SHANNONVALE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
KILLALOE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FOREST CREEK	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BAMBOO	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WHYANBEEL	0.0	0.0	0.0	0.0	0.0	0.0	0.0
COOYA BEACH	1.5	0.0	0.0	0.0	0.0	0.0	1.5
DEGARRA	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MOSSMAN GORGE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ROCKY POINT	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DAINTREE	1.2	0.0	0.0	0.0	0.0	0.0	1.2
LOWER DAINTREE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OAK BEACH	0.1	0.0	0.0	0.0	2.6	0.0	2.7
NEWELL	0.2	0.0	0.0	0.0	0.0	0.0	0.2
KIMBERLEY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
THORNTON BEACH	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FINLAYVALE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
UPPER DAINTREE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DAGMAR	0.0	0.0	0.0	0.0	0.0	0.0	0.0
SPURGEON	0.0	0.0	0.0	0.0	0.0	0.0	0.0
COW BAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DIWAN	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MC DOWALL	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOW ISLAND	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Douglas Shire	87.1	3.4	3.0	10.3	45.8	0.9	150.5

Source: Douglas Shire Council (2022)

Table 10-11 Underutilised Residential Land (Ha) by Zone – Douglas Shire, August 2022

	Low Density Res.	Medium Density Res.	Centre Zone	Total
PORT DOUGLAS	8.2	1.5	0.8	10.5
CASSOWARY	0.0	0.0	0.0	0.0
BONNIE DOON	0.0	0.0	0.0	0.0
MOWBRAY	0.0	0.0	0.0	0.0
WANGETTI	0.0	0.0	0.0	0.0
MIALLO	0.0	0.0	0.0	0.0
STEWART CREEK VALLEY	0.0	0.0	0.0	0.0
MOSSMAN	7.3	0.0	1.5	8.8
CAPE TRIBULATION	0.0	0.0	0.0	0.0
WONGA BEACH	0.0	0.0	0.4	0.4
BLOOMFIELD	0.0	0.0	0.0	0.0
CRAIGLIE	0.0	0.0	0.0	0.0
SHANNONVALE	0.0	0.0	0.0	0.0
KILLALOE	0.0	0.0	0.0	0.0
FOREST CREEK	0.0	0.0	0.0	0.0
BAMBOO	0.0	0.0	0.0	0.0
WHYANBEEL	0.0	0.0	0.0	0.0
COOYA BEACH	0.0	0.0	0.0	0.0
DEGARRA	0.0	0.0	0.0	0.0
MOSSMAN GORGE	0.0	0.0	0.0	0.0
ROCKY POINT	0.0	0.0	0.0	0.0
DAINTREE	0.0	0.0	0.5	0.5
LOWER DAINTREE	0.0	0.0	0.0	0.0
OAK BEACH	0.0	0.0	0.0	0.0
NEWELL	0.0	0.0	0.0	0.0
KIMBERLEY	0.0	0.0	0.0	0.0
THORNTON BEACH	0.0	0.0	0.0	0.0
FINLAYVALE	0.0	0.0	0.0	0.0
UPPER DAINTREE	0.0	0.0	0.0	0.0
DAGMAR	0.0	0.0	0.0	0.0
SPURGEON	0.0	0.0	0.0	0.0
COW BAY	0.0	0.0	0.0	0.0
DIWAN	0.0	0.0	0.0	0.0
MC DOWALL	0.0	0.0	0.0	0.0
LOW ISLAND	0.0	0.0	0.0	0.0
Douglas Shire	15.5	1.5	3.1	20.2

Source: Douglas Shire Council (2022)

Table 10-12 Area of Approved Developments on Vacant Residential Land (Ha) by Zone – Douglas Shire, August 2022

	Low Density Res.	Low-Medium Density Res.	Medium Density Res.	Tourist Accom.	Rural Res.	Centre Zone	Total
PORT DOUGLAS	0.0	0.4	0.6	5.2	0.0	0.3	6.5
CASSOWARY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BONNIE DOON	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MOWBRAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WANGETTI	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MIALLO	0.0	0.0	0.0	0.0	0.0	0.0	0.0
STEWART CREEK VALLEY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MOSSMAN	0.0	0.0	0.0	0.0	0.0	0.1	0.1
CAPE TRIBULATION	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WONGA BEACH	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BLOOMFIELD	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CRAIGLIE	2.0	0.0	0.3	0.0	0.0	0.0	2.3
SHANNONVALE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
KILLALOE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FOREST CREEK	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BAMBOO	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WHYANBEEL	0.0	0.0	0.0	0.0	0.0	0.0	0.0
COOYA BEACH	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DEGARRA	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MOSSMAN GORGE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ROCKY POINT	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DAINTREE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOWER DAINTREE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OAK BEACH	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0
KIMBERLEY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
THORNTON BEACH	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FINLAYVALE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
UPPER DAINTREE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DAGMAR	0.0	0.0	0.0	0.0	0.0	0.0	0.0
SPURGEON	0.0	0.0	0.0	0.0	0.0	0.0	0.0
COW BAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DIWAN	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MC DOWALL	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOW ISLAND	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Douglas Shire	2.0	0.4	1.0	5.2	0.0	0.4	8.9

Source: Douglas Shire Council (2022)

10.3 Appendix C Housing Need Projections

Table 10-13 Small, Medium and Large Households to Dwelling Projections, Douglas Shire, 2021 and 2041

	2021	2026	2031	2036	2041
Port Douglas SA2					
Small	535	538	573	599	629
Medium	629	614	662	689	723
Large	561	636	640	673	703
Total	1,725	1,788	1,876	1,961	2,054
Daintree SA2					
Small	900	928	985	1,031	1,075
Medium	1,373	1,425	1,531	1,618	1,698
Large	714	796	821	870	909
Total	2,988	3,149	3,337	3,519	3,683
Douglas Shire					
Small	1,435	1,466	1,558	1,630	1,704
Medium	2,003	2,039	2,194	2,307	2,421
Large	1,275	1,432	1,462	1,544	1,612
Total	4,713	4,937	5,213	5,481	5,737

Source: Bull & Bear Economics Analysis (2023)