GROWTH MONITORING REPORTING

Final Position Paper
May 2025

Queensland Government

The Department of State Development, Infrastructure and Planning connects industries, businesses, communities and government (at all levels) to leverage regions' strengths to generate sustainable and enduring economic growth that supports well-planned, inclusive and resilient communities.

Translating and interpreting service

If you have difficulty understanding a document and need an interpreter, we provide access to a translating and interpreting service. You will not be charged for this service. To contact the Translating and Interpreting Service, telephone 131 450 and ask them to telephone the Department of State Development, Infrastructure and Planning on +61 7 3328 4811.

Contact us

☎ +61 7 3328 4811 or 13 QGOV (13 74 68)
@ info@dsdilgp.qld.gov.au
🖥 www.statedevelopment.qld.gov.au
✉ PO Box 15009, City East, Queensland 4002
🏠 1 William Street, Brisbane 4000

D25/50283

Contents

Queensland Government

Tables

Figures

Queensland
Government

Introduction

The Queensland Government has committed to constructing one million new homes by 2044, with 53,500 dedicated to social and community housing. A large portion of these homes will be in South East Queensland (SEQ) with SEQ anticipated to accommodate 82 per cent of Queensland's population by 2046. The urgency of the growth task is evident in the housing supply challenge and high demand placed on services. The pace of change, and our ability to respond in a timely and appropriate manner, is becoming increasingly important, with accurate, fit for purpose data and information critical to inform decisions.

Despite this growth, Queensland is behind other states in its reporting of land supply and housing and does not have a common baseline to report against. This is impacting our ability to receive our fair share of funding from the Federal Government. Moreover, research undertaken on growth and housing diversity in March 2024 shows that only one in five (21 per cent) of Queenslanders have confidence that the Queensland Government has a plan to manage Queensland's population growth. Ensuring new growth monitoring efforts that are aligned with the diverse needs of our regions is vital to tracking progress, evidencing impact and providing an agile and responsive system that intervenes quickly and effectively to meet Queensland's rapid growth. Growth data helps to identify gaps in performance and uncover opportunities to improve, whether that means making processes more efficient, reducing costs, increasing available funds or boosting community satisfaction. Also critical to these efforts is the availability of quality data to inform evidenced based policy development and decision making.

This position paper outlines the purpose, strategic approach and scope of future Queensland Government growth monitoring reporting. Building on prior land supply and development monitoring (LSDM) reporting in SEQ, the future of growth monitoring reporting recognises the broadening scope of land supply for housing and employment and considers a broader range of aspects and implications of growth. It recognises the need to build Queensland's reputation in planning and growth compared to other states with equivalent monitoring reporting. It is noted that growth monitoring reporting in Queensland is currently confined to the SEQ region, presenting opportunities for expansion and consistency of reporting on land for housing and employment across the state.

Consistent growth monitoring reporting across Queensland is critical to provide up to date and transparent evidence to inform planning policy reviews and decisions to unlock more supply of housing and employment land. It supports agile and responsive decision making that allows local and state governments, industry and communities to intervene quickly and effectively to accommodate Queensland's rapid growth. Understanding what has happened in the past, establishing what is happening now, and envisaging what may happen in the future and then analysing these trends against existing policies and targets is essential to determine what needs to be done. Monitoring represents one crucial component of the cyclical process of policy and decision-making to enable effective outcomes.

Monitoring land supply for housing and employment and development activity is a complex task that can be undertaken in a variety of ways. Although there is no one size fits all approach, there is a general understanding of the focus areas which should be included. While Queensland has made significant progress in recent years on improving mechanisms for land supply and development monitoring reporting, an opportunity exists to further enhance the way this is delivered.

Queensland Government

Background

On 16 August 2023, National Cabinet agreed to a national target to build 1.2 million new homes in well-located areas over five years from 1 July 2024. Queensland's share of this dwelling target is 20 per cent or approximately 245,000 homes, or about 49,000 homes per year. The target is to be achieved over five years from mid-2024. Only if this target is exceeded will Queensland be eligible for relevant funding under the $3 billion New Home Bonus from the Federal Government. National Cabinet is also publicly reporting on planning reforms to be delivered by states and territories to support meeting this target and to improve housing supply and affordability.

The Queensland Government, through the Department of State Development, Infrastructure and Planning (DSDIP), is required to report twice annually to National Cabinet on state, regional and local progress towards the National Planning Reform Blueprint. This includes updating regional and local planning schemes to reflect Queensland's share of housing supply targets. Queensland sets housing supply targets through statutory regional plans under the *Planning Act 2016* (Planning Act). This is because regional plans recognise diversity and identify place-based matters and coordinate state government interests, including the delivery of infrastructure that are important and specific to each Queensland region.

The Land Supply and Development Monitoring Report (LSDM Report) has been a cornerstone for growth monitoring in SEQ, with annual reports disseminated from 2018 through 2021 under the Growth Monitoring Program (GMP), now the Growth Monitoring Unit (GMU). The latest report in 2021 aligned with the objectives of the South East Queensland Regional Plan, *ShapingSEQ* 2017. The LSDM Report is used to inform timely policy adjustments and reviews by State and Local Governments. The annual report monitors the implementation of ShapingSEQ and forms an integral part of the guidance material for integrating state interests in planning schemes by Local Governments in SEQ.

Following a commitment to an independent review by the then Planning Minister on 3 March 2021, the LSDM Report underwent a rigorous peer review, culminating in 41 recommendations published in April 2022. The subsequent LSDM Peer Review Implementation Strategy for 2022-2024, comprising of six key initiatives, focused on data integrity and transparency, has already seen the successful completion of 80 per cent of the recommended actions since inception. The remaining actions are either underway or scheduled for future review, ensuring continuous improvement in the quality and governance of data driving growth monitoring reporting.

Key mechanisms that were established for growth monitoring reporting have historically been:

- the LSDM Report – there has been six LSDM Reports prepared since 2018 with only four publicly released. The LSDM Report provides a "snapshot in time" summary of planned dwelling supply, approved supply, dwelling growth, changes in dwelling density and housing type, and number of home sales and price. In addition, the LSDM Report also reported on planned industrial land supply and the take-up of planned industrial employment supply.

- the SEQ Market Factors Report – this report was introduced in 2019 (with three publicly released to 2021) and provides additional context and information to the LSDM Report. The report analyses contextual factors which influence the demand for residential land and development such as consumer price index, finance activity, housing costs and affordability.

- the Measures that Matter online portal – the online portal was organised under the five regional plan themes of 'Grow', 'Prosper', 'Connect', 'Sustain' and 'Live'. These measures were regularly maintained and reported on via the department's website.

Queensland Government

Table 1 outlines the key dates and milestones of the progression of growth monitoring reporting to date.

Table 1: Historic growth monitoring reporting

Date	Milestones
Pre - 2017	• Limited land supply databases and monitoring
2017	• Release of *ShapingSEQ* 2017, August 2017

2018	• Establishment of GMP, governance frameworks, research programs and delivery of:
	  • Foundation LSDM Report
	  • Measures that Matter
	  • SEQ Housing Supply Expert Panel (HSEP)
	  • Public release of 2018 LSDM Report

2019	• Public release of 2019 LSDM Report annual update, release of inaugural SEQ Market Factors report, enhanced reporting and the progression of Best Practice Research (BPR) and priority actions
2020 - 2021	• Ongoing LSDM Report refinement, enhancement and improvement based on results of BPR, responses to priority actions and stakeholder feedback • Public release of 2020 and 2021 LSDM Reports • Public release of accompanying 2020 and 2021 SEQ Market Factors
2022	• LSDM Peer Review undertaken, concluding with 41 recommendations and an Implementation Strategy responding to the recommendations • 2022 LSDM Report drafted but not publicly released due to the review of *ShapingSEQ* 2017
2023	• Release of *ShapingSEQ* 2023, December 2023 • Publication of Shaping SEQ Indicator Dictionary, December 2023 • GMU program of works ongoing in response to Implementation Strategy to provide a holistic approach to growth monitoring reporting
2024	• GMU program of works ongoing to provide a holistic approach to growth monitoring reporting • 80 per cent of the 41 LSDM Peer Review recommendations have been implemented, with 10 per cent in progress and 10 per cent for future consideration.

Queensland
Government

Growth monitoring reporting

Purpose

Growth monitoring reporting aims to provide a common baseline and reference point that is accessible, transparent and shared publicly to regain trust in Queensland Government's ability to plan for growth. Information is communicated through the release of an annual report and online dashboard.

Growth monitoring in SEQ reports on land supply for housing and employment and tracks development activity across SEQ as at 31 December of the previous year. The results and insights inform policy responses and actions in accordance with the objectives of the SEQ Regional Plan at the time (for 2025 this is *ShapingSEQ* 2023).

Noting the Queensland Government's commitment to greater accountability and transparency, this position paper aims to clearly outline future expectations for monitoring and reporting on realistic growth as an important starting point to look at shared solutions for addressing growth challenges. The paper communicates proposed enhancements to growth monitoring reporting as an influential tool to support the timely delivery of housing to Queensland's communities. It will also reset the GMU and seeks to achieve collective agreement on future requirements for monitoring and reporting.

Strategic approach

To deliver growth monitoring that is agile and responsive, and informs timely policy review, the following core principles will guide the department's approach to monitoring:

Collaborative

The GMU seeks a genuinely collaborative approach to growth monitoring reporting with key stakeholders and recognises that collaboration and engagement are key to the development of a more robust and accountable growth monitoring reporting framework. This collaboration will include:

- the two-way sharing of data between State and Local Governments
- continuing to engage on major project work where local expertise and knowledge is sought
- careful consideration of each local government's capacity to implement new requirements, supply data and verify findings
- engagement on key directions such as this position paper
- engagement with Local Governments on draft Growth Monitoring Reports before release.

Cyclical process

Monitoring is essential to understanding what has happened in the past, establishing what is happening now, and envisaging what may happen in the future to compare against existing policies and targets to determine what needs to be done. It presents a crucial feedback loop within the broader cyclical process of policy making (**Figure 1**). The ability to monitor performance towards stated policy objectives and housing supply targets is a dynamic process with the effectiveness to do so underpinned by the ability to collect and analyse the right kinds of data from Local Governments and statistical agencies and communicate timely insights for policy and decision-making.

Queensland Government

The GMU uses data-driven processes to report on land supply for housing and employment and track development activity. The GMU, through growth monitoring reporting, provides timely insights for policy review and action by policy units across Government in accordance with the objectives of the Regional Plan at the time (for SEQ in 2025, this is *ShapingSEQ* 2023).

Where potential policy implications have been identified within the Growth Monitoring Report, it will be referred to the relevant team in Queensland government to undertake further due diligence and to determine the scope of any required policy review and/or intervention in consultation with Local Government.

Infusing a cyclical monitoring process calls for a process that is:

- **Efficient**: monitoring activities should not become a burden to local governments or participating stakeholders.
- **Effective**: clear and timely guidance to local governments, and participating stakeholders, defining roles and data requirements and standards.
- **Consistent**: consistency in methodology and indicators to allow for year-on-year comparisons.
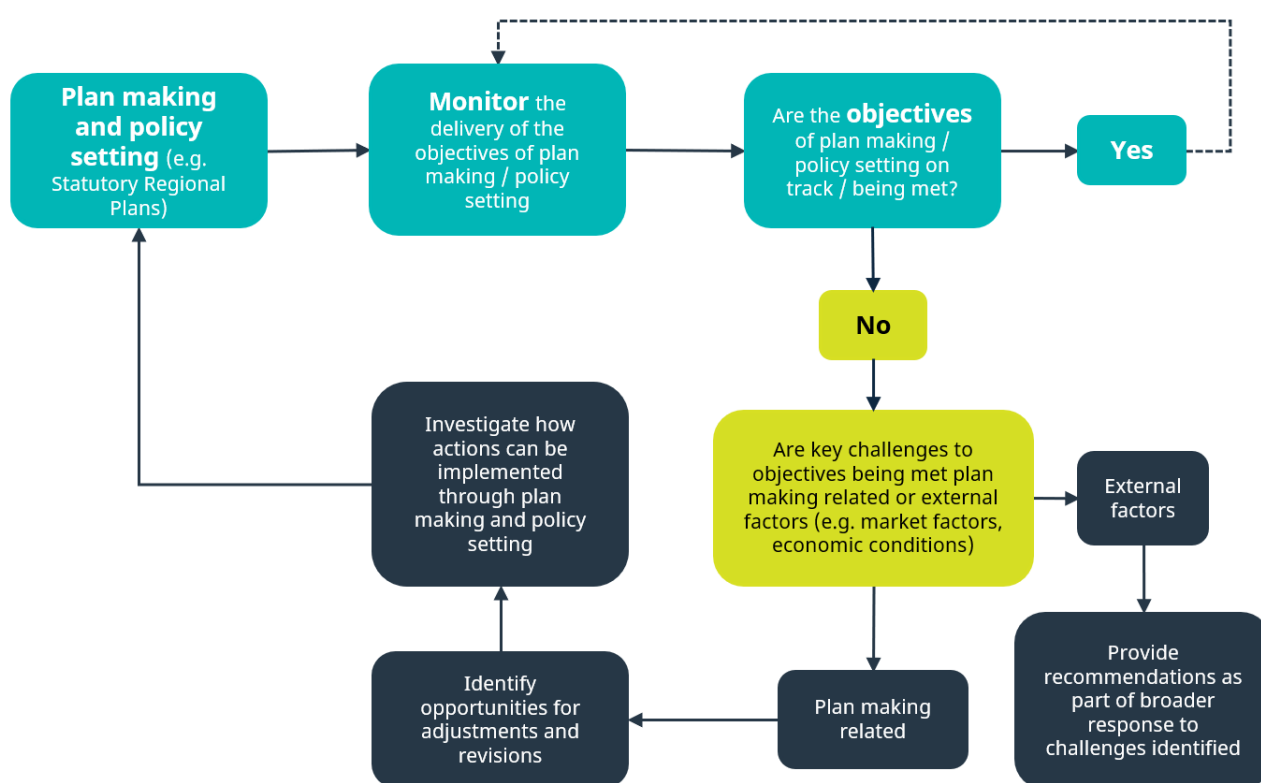
Figure 1: Growth monitoring cycle for planning and policy making

Data-driven evidence

Queensland's planning system plays a critical role in ensuring the timely supply of land for housing, retail, commerce, industrial, community and infrastructure over time, which impacts the affordability and availability of homes and the prosperity and liveability of the region. Evidence and data-driven regional and local plan drafting and planning scheme reviews are now the norm as it provides confidence in our planning system and helps ensure that planning schemes adequately respond to growth. Reliable data for monitoring improves confidence and facilitates the speed and efficiency of plan drafting, stakeholder engagements and state reviews. Clear guidance

and working collaboratively with Local Governments on methodology, data quality, consistency, data standards and assurance are essential to provide for a reliable growth monitoring reporting system.

Planning data, such as land for housing capacity estimates, development projections, development applications, and approval and completion data are central to the process of monitoring land and housing supply. Despite improvements, the currency, quality and completeness of local planning data remain major considerations to provide for effective monitoring.

The GMU relies on various data sources which are constantly being updated and amended. The GMU continues to work with data providers to source more regularly updated information and is committed to ongoing improvements in data, analysis, and interpretation.

Consistency and accuracy of data supply are critical considerations. Authoritative suppliers such as the Australian Bureau of Statistics (ABS) and the Government Statisticians Office (QGSO) in Queensland Treasury feature heavily in the data sources for the indicators due to their consistent and reliable supply. In addition, central to the success of this data-driven process is the involvement and supply of data by Local Governments, utility providers and other state agencies including Economic Development Queensland and the Department of Housing and Public Works. Sourcing data from across government assists in developing a collective understanding of housing growth and supply within local government areas, and the region.

The GMU undertakes an annual data request to source necessary data for update and to build new indicators from these data providers, and values and places considerable effort in building relationships to ensure the most accurate and up to date data is used in the delivery of growth monitoring reporting. As part of the annual data request, the GMU ensures the latest versions of data are utilised, including endorsed planning scheme data. While each annual Growth Monitoring Report relies on adopted land supply capacity (LSC) estimations contained in planning assumptions of local government infrastructure plans (LGIP) for the purposes of monitoring, it is important to note that in most cases these LSC estimations are updated only once every 5 years. Recognising this shortcoming, the GMU in collaboration with local governments has embarked on a project that aims to improve the update frequency and quality of land supply capacity (LSC) estimations across SEQ, accessible at a single point for downstream use by internal data, modelling and monitoring systems in Local and State Government.

Further, the GMU always seeks opportunities for reciprocal data sharing with stakeholders where possible.

Holistic and integrated

Monitoring the implementation of existing policies and targets requires a holistic approach. Focusing on individual indicators, such as 'number of years of realistic planned supply' in isolation, is inadequate and negates the role of the planning framework as part of the broader response required to address the land supply for housing and employment challenges. Taking a broader perspective on supply and demand considerations plays a pivotal role in ensuring a holistic approach to policy and decision-making.

Growth monitoring needs to adopt a holistic system approach, encouraging users to consider the interdependencies and inter-relationships between themes and indicators (**Figure 2**). Tracking, reporting, and understanding the inter-relationships and cumulative impact of indicators is increasingly important for policy review and action, especially in city regions, where boundaries are increasingly blurred.

It is important to recognise that the themes and indicators in the annual Growth Monitoring Report are not intended to be read in isolation from each other, and to understand their interconnectedness, given the complexities of the task of monitoring land supply for housing and employment. This will aid in providing a better understanding of the extent the many and various factors may have on policy objectives and targets.

Queensland
Government
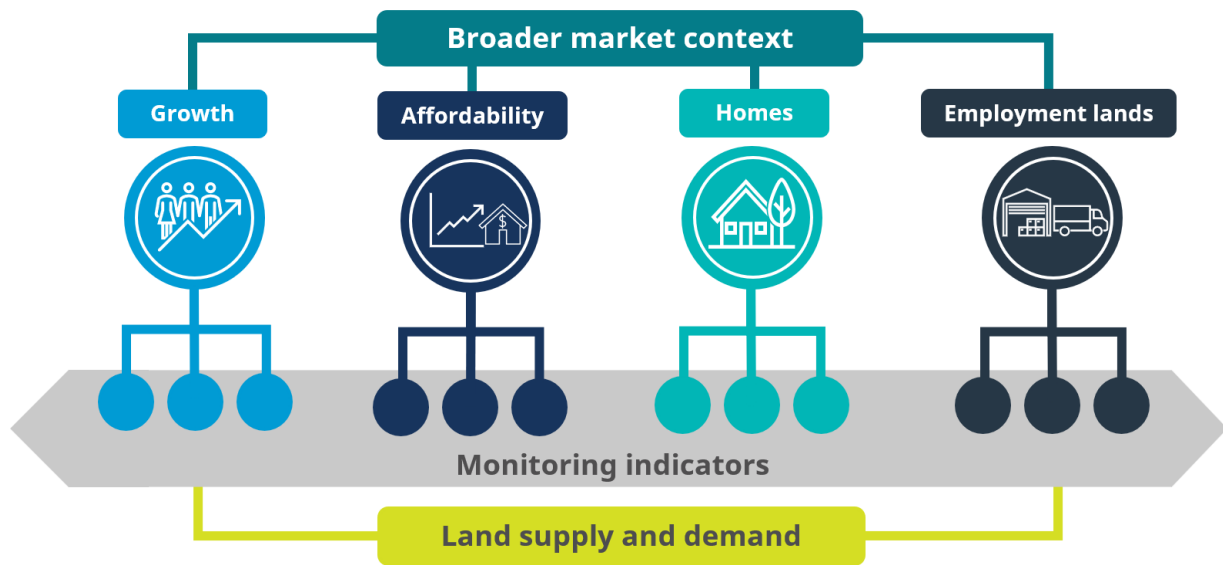
Figure 2: Interrelationships of monitoring themes, indicators and broader market context

The development of theme indicators prioritises the guiding principles of relevance, repeatability, reliability, credibility, well-defined, and utility for decision making. The complexity of monitoring requires an agile approach to indicator development particularly with the evolving nature and availability of data. The development of indicators for inclusion for monitoring (**Figure 3**) requires an iterative approach to ensure a more dynamic approach to growth monitoring reporting that enhances data currency, reliability, transparency, and governance whilst also confirming an indicator is relevant and fit for purpose.

Establish base indicators for monitoring
- To improve data governance and data management, a foundational base must first be established. This involves identifying a set of base indicators for monitoring underpinned by the guiding principles.

Refine and expand base indicators
- Once base indicators have been established, a refinement process is required to understand the appropriateness, validity, and value of the established base indicators. This also involves the further expansion of the base indicators.

Improve existing and build new indicators
- Following the establishment and refinement of the base indicators, further improvements are undertaken as well as the identification of new indicators which may provide more value. This may include the removal of some indicators as conditions change.

Figure 3: Approach to indicator development and inclusion for monitoring

In developing indicators for monitoring, the department released the Shaping SEQ Indicator Dictionary alongside *ShapingSEQ* 2023. This dictionary contains a proposed suite of indicators for measuring land supply, development,

Queensland Government

economic and other trends for growth monitoring reporting. The indicators outlined in the dictionary expands on previous reporting and provides more context.

The GMU consulted with Local Government, State agencies and industry bodies early in the development of the indicator dictionary, seeking feedback and input in not only the indicators to be included, but also to the details for each including the description, rationale, data source, geography, methodology, units of measurement and frequency of update. Feedback was incorporated into the version released as part of *ShapingSEQ* 2023. This dictionary will continue to evolve as potential new indicators are investigated for inclusion and existing ones are updated where necessary to 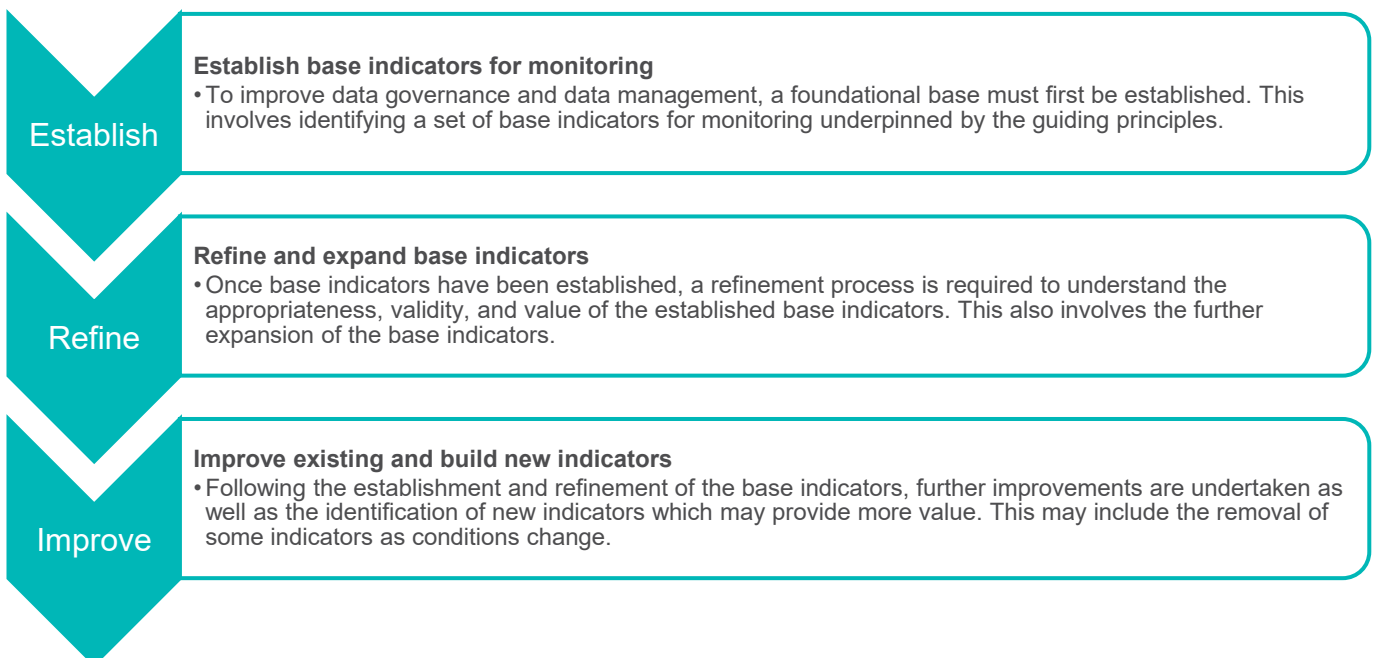provide more context for end users. As a living document, the indicator dictionary will be updated regularly to reflect any changes that may occur in data availability, methodological approach, and / or refinement of the list of identified indicators.

Transitional

Since its inception in 2018, annual LSDM reporting has provided an improved understanding of land supply and development trends as a measure of the region's progress towards the objectives of the 2017 SEQ Regional Plan (*ShapingSEQ* 2017) and has helped inform growth management strategies decisions regarding land and housing supply.

ShapingSEQ 2017 was superseded by *ShapingSEQ* 2023 in December 2023, and future monitoring will be reported against this updated plan (**Figure 4**). Recognising the broadening scope of reporting to consider aspects and implications of growth, not just land supply and development activity, the 2025 report will undergo a name change and will be titled the Growth Monitoring Report moving forward. Previous LSDM reports between 2018 to 2021 will be archived and will remain publicly available for historical purposes.
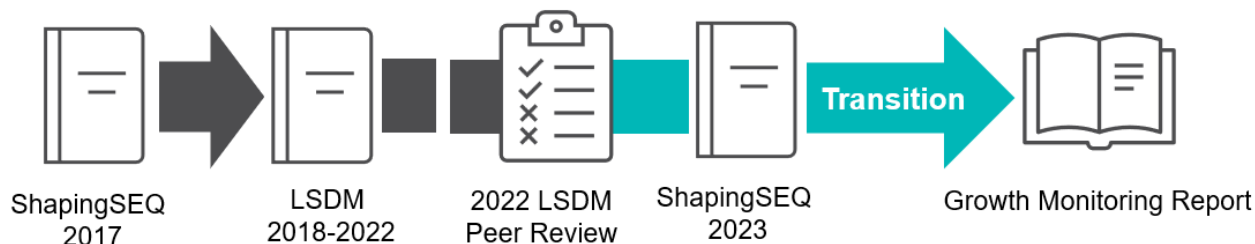

Figure 4: Transition from LSDM Report to Growth Monitoring Report

Informed by the peer review recommendations and an ongoing program of improvements, several important design considerations have been considered in the transitioning to the Growth Monitoring Report and are summarised in **Table 2.**

Queensland Government

Table 2: Design considerations for the Growth Monitoring Report

Design Consideration	Historic LSDM reporting 2018 to 2021	Growth Monitoring Report	Notes
Reporting period	30 June each year (i.e. financial year)	Calendar year, ending 31 December (where possible)	Reporting by calendar year will imply the release of the Growth Monitoring Report in the second quarter of the following year to provide time for the full calendar year data to be reflected in the Growth Monitoring Report.
Release date of report	Annually, end December	Annually, second quarter	Allow sufficient time for full calendar year data to be released and analysed.
Regional Plan	Monitoring *ShapingSEQ* 2017	Monitoring *ShapingSEQ* 2023	*ShapingSEQ* 2017 and *ShapingSEQ* 2023 have different baselines and targets, which will be appropriately reflected in the Growth Monitoring Report.
Measures that Matter (MtM)	Reported separately, and in addition to the LSDM Report	MtM has been discontinued, and relevant measures transferred to the new Growth Monitoring Dashboard	MtM has been removed from *ShapingSEQ* 2023. However, some indicators remain relevant and will continue to be reflected in the Growth Monitoring Report and Dashboard
SEQ Market Factors	Reported separately, and in addition to the LSDM Report	Incorporated within the Growth Monitoring Report to provide for a single report	To provide for a more holistic overview of both supply and demand considerations, inclusion of SEQ Market Factors will provide additional market context and economic demand considerations in one single report
Report Format	Online web-based report	Formal published report, available in hard copy and downloadable online	To improve readability and access, the Growth Monitoring Report will become a published report available for download. The report will represent a synthesis of insights of the previous calendar year and contains recommendations and actions

Independent

Building public confidence in the Growth Monitoring Report is essential. Future Growth Monitoring Reports and background technical reports will be peer reviewed by an independent expert panel, prior to release. Findings and recommendations by the reviewers will be made public. Independent experts will be drawn from across Australia and from a variety of backgrounds. This process will provide the opportunity to receive perspectives and feedback

Queensland Government

from independent experts to help identify any potential gaps in the reporting and assist the GMU with their program of continual improvement.

Oversight

The implementation of *ShapingSEQ* 2023 is the responsibility of several stakeholders including all tiers of government, Traditional Owners, the community and industry. A ShapingSEQ governance framework, comprising various groups, committees, the Delivery Office, GMU and the Minister of Planning, have multiple levels of responsibility and looks after the implementation of ShapingSEQ. The GMU forms an integral part of the governance framework (See **Figure 5**) and informs the Project Control Group on matters that relate to monitoring of 'Grow' and 'Prosperity' in ShapingSEQ. The annual release of the Growth Monitoring Report is subject to approval by the Minister for Planning. For more information, see Governance in Southeast Queensland Regional Plan 2023 (ShapingSEQ).
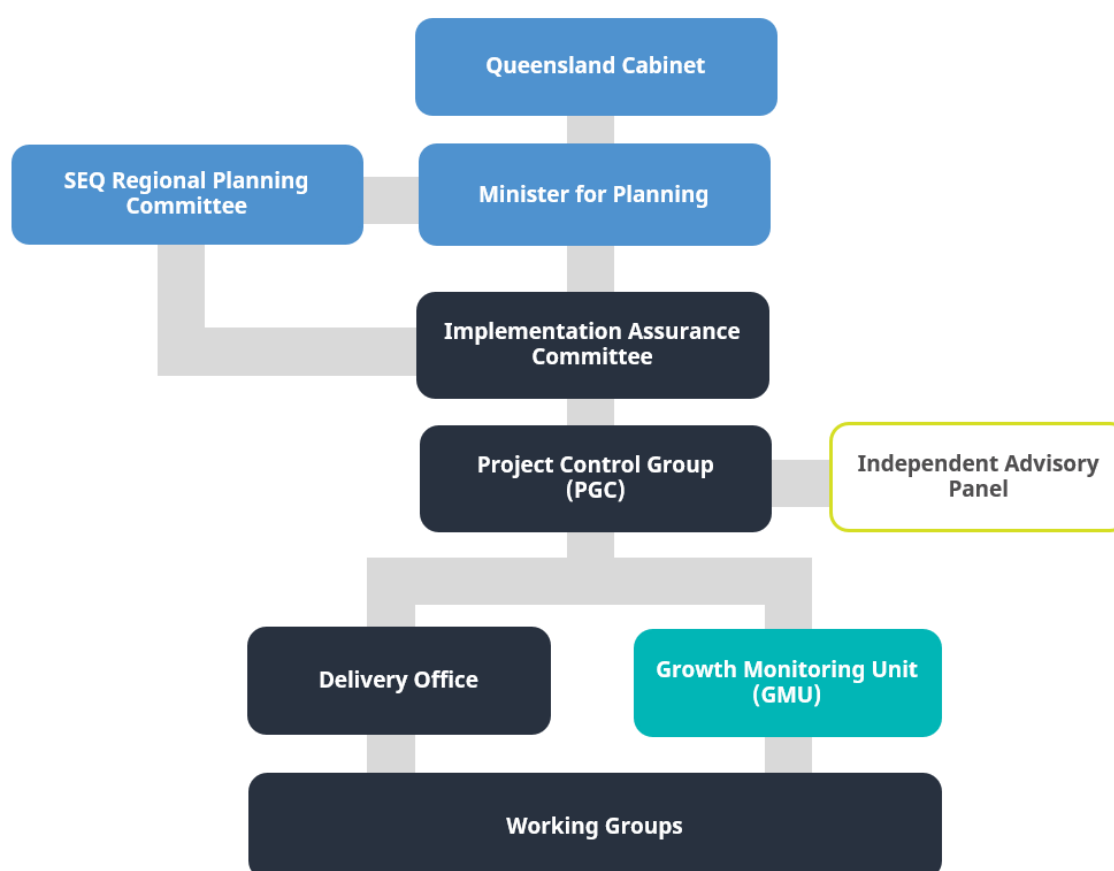
Figure 5: ShapingSEQ Governance Framework

Sound data governance

The GMU places great emphasis on the importance of data governance across the breadth of growth monitoring reporting (see **Figure 6**). The GMU has implemented a data governance framework including directory structures, version management and access permissions to ensure data security, integrity and consistency to inform evidenced based policy development and decision making. This includes entering into data use agreements with suppliers where requested.

One of the key focus areas for GMU has been the development of sophisticated workflows to automate data analysis and move away from a reliance on more manual processes, to improve data efficiencies and

transparency. Data workflows are processes that transform and combine raw data inputs into usable outputs using Extract, Transform and Load (ETL) software. These workflows provide for auditable and repeatable data processing allowing for full transparency of the data transformation steps undertaken. Rigorous quality assurance processes have been implemented to ensure workflows, and their outputs are accurate and fit for purpose.

Figure 6: Growth monitoring reporting data processes

Public access and open data

Insights and analysis gained through growth monitoring reporting can be communicated publicly using various tools and mechanisms to suit the audience and the intended purpose. Since the GMU was established, significant research has been undertaken into the most effective methods for communicating the results of growth monitoring reporting. This has included engagement with key stakeholders to identify improvements and determine the most effective methods to implement quality and fit for purpose growth monitoring reporting.

Three initial key output formats and mechanisms have been identified:

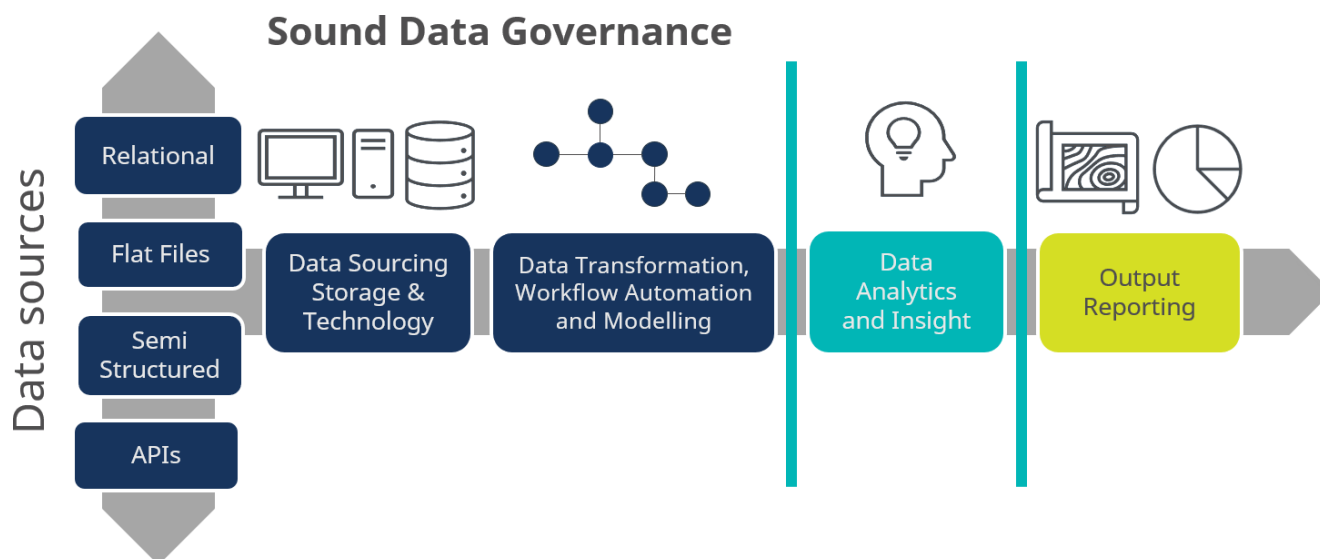- **Growth Monitoring Report publication:** transition of the historic LSDM Report into the Growth Monitoring Report to recognise the broadening scope to consider aspects and implications of growth, not just land supply and development. The annual report publication will be available for download on the department's website and background technical reporting available on request.

- **Growth Monitoring Dashboard:** accompanying interactive publicly available online dashboard, also accessible and available on the department's website.

- **Open Data Portal:** The Queensland Government is committed to releasing data and allowing it to be freely used, reused and redistributed by anyone, anytime, and anywhere. Open data can bring several benefits, including to foster transparent, accountable, efficient, responsive and effective government, and improve the evidence-base for policy review and action. The GMU has made substantial progress towards the development of large spatial datasets to support growth monitoring reporting with the aim of releasing these regularly on Queensland Government Open Data Portal, with the SEQ Industrial Land dataset being the first of these made available. Other data to be made available will be some of the information accessible via the online dashboard (note only data already publicly available through other sources such as ABS and QGSO will be made available in a consolidated and standardised format).

Queensland Government

Scope of reporting

Annual report

Acknowledging the expanding scope of growth monitoring to capture greater data and insights, the GMU is transitioning the LSDM Report into the Growth Monitoring Report to improve monitoring of the performance of strategies and targets of *ShapingSEQ* 2023.

The Growth Monitoring Report (GMR) focuses on reporting against the following indicator types:

- **Policy indicators:** alert policy makers to potential issues and provide a starting point for policy review. An example of policy indicators would be those dwelling supply/growth indicators that track the delivery of one million homes by 2044.

- **Contextual indicators:** aim to help users better understand the changes and trends across the region and form an integral part of interpreting policy indicators. An example of a contextual indicator would be interest rates, or construction costs, which can impact on housing delivery by increasing costs.

The indicators sit within four key themes (**Figure 7**). Where appropriate, summaries and analysis of indicators that collectively relate to a specific policy outcome and/or sub-regional land market have been discussed together.

Growth	**Affordability**	**Homes**	**Employment Lands**
Population growth and demand – to provide insight into potential implications for current and future land supply and housing requirements to meet the needs of the community.	**Housing affordability –** to provide insight into the ability of households to meet their housing costs without experiencing financial stress or compromising their living standards.	**Residential land and housing supply –** to provide insight into current policy settings, and how facilitative (or otherwise) they are considering a combination of supply, size, mix, speed and density of housing.	**Employment and industrial land supply –** to provide insight into employment lands including current industrial land supply across SEQ and potential implications for future supply.

Broader market context

Broader market context – to provide an understanding of the potential implications broader market conditions can have on the sections explored in the GMR - growth, affordability, homes, and employment lands

Figure 7: Growth Monitoring Report key themes

The following tables outline a non-exhaustive list of potential or indicative indicators that have been identified for monitoring purposes and are grouped into the four key themes. It also highlights several indicators in relation to broader market conditions that, although outside of the identified themes, provide important context to assist end users to gain insights. It is noted some of the indicators shown have not yet been fully developed but are flagged for future improvement, and that further indicators may be developed as outcomes from the key actions for improvements identified in each annual report are implemented. In addition, some indicators listed may be amended or replaced over time if identified as not providing value to end users, or if better suited / fit for purpose data sources become available.

Queensland Government

Table 3: Indicative indicators contained within the key themes

Growth

Indicative indicator	What does it tell us about?
Population growth (%) *(Source: ABS)*	A proxy indication of the extent of likely pressures placed on housing, public infrastructure and services
Median age of resident population *(Source: ABS)*	The demographic trends of population age give an indication of evolving community needs for the planning of housing, services and infrastructure
Change in the SEQ Population Age Structure (by percentage) *(Source: ABS)*	The demographic trends of the changes in population age give an indication of evolving community needs for the planning of housing, services and infrastructure
Average household size (no. of persons) *(Source: ABS)*	Housing and lifestyle preferences as a key determinant of underlying demand for housing including housing diversity
Change in households by composition (percentage points) *(Source: ABS)*	Social and demographic change reflecting patterns such as family formation, dissolution and ageing
Small household to small dwelling ratio (no. of small households to no. of small dwellings) *(Source: ABS)*	The relationship between small dwellings (1-2 bedrooms) and small households (1-2 persons). Does not necessarily indicate housing and lifestyle preferences
Dwelling growth (no. of building approvals for new dwellings) *(Source: ABS)*	A proxy for total housing stock growth and pressures on demand for housing, to indicate movement towards achieving the ShapingSEQ 2023 dwelling targets.

Affordability

Indicative indicator	What does it tell us about?
Estimates of homelessness (no. of people) *(Source: ABS)*	The extent of the inadequacy of an individual's living arrangements and subsequently an indication of the demand for social and affordable housing
Number of persons seeking homelessness support services *(Source: Australian Institute of Health and Welfare)*	The extent of the inadequacy of an individual's living arrangements and subsequently an indication of the demand for social and affordable housing
Social housing register waitlist (no. of applications) (*Source: Queensland Government, Social Housing Register*)	The demand for social housing within the community
Average time spent on the social housing register waitlist (months) *(Source: Queensland Government, Social Housing Register*)	An indication of the gap between the available social housing stock and evolving community needs.
Median detached / attached dwelling price ($) *(Source: Queensland Government, QGSO)*	The purchase costs of housing market. Fluctuations in dwelling prices coupled within household income, median weekly rents or average mortgage repayments provide an indication of potential housing affordability for households
Median weekly rents ($ per week) *(Source: Residential Tenancy Authority)*	Fluctuations in median weekly rents coupled with household income (amongst other factors) provides insight into potential rental affordability and rental stress being experienced by households.
Average mortgage repayments ($ per month) *(Source: ABS)*	Fluctuations in average mortgage repayments coupled with household income (amongst other factors) provides insight into potential affordability and mortgage stress being experienced by households.
Share of households that paid more than 30% of income to rent / mortgage repayments *(Source: ABS)*	Provides an indication of the extent of housing affordability (when coupled with other indicators such as household income) and may indicate potential financial stress.
Median household income ($ per week) *(Source: ABS)*	A precursor to the extent of housing affordability and subsequent potential levels of mortgage or rental stress that may be experienced by households
Distribution of low- and high-income households (% of households in bottom 25% earning threshold and % of households in top 25% earning threshold) *(Source: ABS)*	Provides an indication of where significant variances in household income may occur across the region in meeting household expenses (rent / mortgage, utilities, transport etc.). Understanding the household income distribution provides insights as to potential extent of housing affordability issues across the region.
Rental vacancy rate *(Source: Real Estate Institute of Queensland)*	Provides an indication of the percentage of rental properties in an area that are unoccupied and available for rent. Rental vacancy rates alongside median weekly rents, household income etc. helps identify potential pressures on the rental market and subsequent affordability.

Queensland Government

Homes

Indicative indicator	What does it tell us about?
Broadhectare land (ha) *(Source: Queensland Government, QGSO)*	The amount of total land planned and currently suitable for residential development
Residential lot approvals (no.) *(Source: Queensland Government, QGSO)*	Residential lot approvals are a general indicator of land supply proposed for development
Uncompleted lots with operational works approval (no.) *(Source: Queensland Government, QGSO)*	The number of approved lots that are likely to be available for sale and/or the construction of new dwellings in the short-term. (because they are residential lot approvals with civil engineering works (e.g. road works, stormwater))
Lot registrations (no.) *(Source: Queensland Government, QGSO)*	The number of additional lots 'completed' (i.e. lot registration is the final step before a new lot is released for sale and/or has a new dwelling constructed on the lot) and likely to be added to residential land supply in the short-term
Vacant land sales (no.) *(Source: Queensland Government, QGSO)*	The number of vacant land sales indicates the amount of lots released to market and/or market take-up (demand)
Vacant land sales (price per square metre) *(Source: Queensland Government, QGSO)*	The price of vacant residential land is a component of understanding housing affordability pressures
Dwelling sales (no.) *(Source: Queensland Government, QGSO)*	Trends in sales numbers for different dwelling types (i.e. detached and attached) provide insight into changes in housing preferences and housing need.
Land supply capacity (%) *(Source: Queensland Government, GMU)*	Land supply capacity (ultimate) is the estimated maximum number of dwellings that are planned for by a planning scheme on land that is unconstrained (e.g. not flooded). Planning for sufficient capacity in the long-term is important to ensure that sufficient opportunities exist for new housing. ** Estimations exclude non-residential floor area at present. Further investigations for improvement underway to include non-residential floor area in future reporting.*
Realistic planned dwelling supply (no. of years) *(Source: Queensland Government, GMU)*	Realistic planned dwelling supply on land that has been appropriately zoned and is either currently serviced or planned to be serviced. External factors such as development costs and development feasibility measures at the time of estimation are considered. ShapingSEQ requires a minimum of 15 years of planned supply to meet projected medium-term demand.
Approved dwelling supply (no. of years) *(Source: Queensland Government, GMU)*	The number of dwellings that have been approved to meet projected demand in the short-term expressed in years of supply. Approved supply refers to land that has the relevant planning approvals for the construction of additional dwellings but is yet to have the dwellings constructed. ShapingSEQ requires a minimum of 4 years of approved supply to meet projected short-term demand.
Residential zoned land (ha) *(Source: Queensland Government, GMU)*	Understanding the amount and share of different kinds of residential zoned lands (i.e. low density, low-medium density, medium density, high density and rural residential) can provide insight into changing land use priorities in these areas, particularly where changes are monitored over time
Dwelling diversity by type (%) *(Source: ABS)*	Dwelling diversity (i.e. detached, low-rise, medium-rise and high-rise) and potential to meet ShapingSEQ gentle density policy and dwelling diversity sub-targets
Social housing as a % of total dwelling stock *(Source: ABS)*	The percentage of total dwelling stock that is defined as social (social housing is made up of two types of housing, public housing, which is owned and managed by State government and community housing, which is managed (and often owned) by not-for-profit organisations).
Number of social houses *(Source: ABS)*	The number of houses that are defined as social by SEQ LGA (social housing is made up of two types of housing, public housing, which is owned and managed by State government and community housing, which is managed (and often owned) by not-for-profit organisations).
Total number of government owned dwellings *(Source: Queensland Government, Housing)*	The total number of dwelling stock owned and managed by State government which makes up the bulk of social housing

Queensland Government

Employment lands

Indicative indicator	What does it tell us about?
Unemployment rate (%) *(Source: Jobs and Skills Australia)*	Provides an indication of overall economic stability and employment conditions, reflecting the availability of jobs and the efficiency of labour market operations. High unemployment can be a sign of economic distress. The housing market is closely linked to the state of the labour market with job security being a vital factor for household income and consequently housing demand
Business growth *(Source: ABS)*	Economic growth of a region's economy, the economic health of industries and the overall stability of broader economic conditions
Total supply of industrial zoned land (ha) *(Source: Queensland Government, GMU)*	The total amount of zoned industrial land that is intended for industrial operations / use. Tracking the amount of industrial land supply over time helps to understand development activity, supply, and demand for industrial land within a defined area.
Area of industrial zoned land that is undeveloped (ha) *(Source: Queensland Government, GMU)*	The total amount of zoned industrial land available for industrial operations / use that is current classified as 'undeveloped'
Area of undeveloped land that has been identified as developable (ha) *(Source: Queensland Government, GMU)*	The total amount of developable (i.e. with constraints removed) zoned industrial land available for industrial operations / use
Area of undeveloped land that has been identified as serviced / unserviced (ha) *(Source: Queensland Government, GMU)*	The total amount of zoned industrial land available for industrial operations / use that is current classified as 'undeveloped' and is 'serviced' (i.e. is within the sewer connection area) and 'unserviced' (i.e. is outside of the sewer connection area)
Industrial lots by size (no.) *(Source: Queensland Government, GMU)*	The availability of land to accommodate differing industrial uses and identify potential gaps or imbalances in supply (e.g. limited availability of large industrial lots or potential oversupply of smaller industrial lots
Industrial lots by industrial zone (no.) *(Source: Queensland Government, GMU)*	Where potential concentrations of industrial uses may occur based on the nature of industrial operations

Broader market context

Indicative indicators	What does it tell us about?
Annual consumer price index (CPI) growth *(Source: ABS)*	Household inflation and household expenditure. Significant changes in CPI can impact everyday household consumption and indirectly impact on housing costs and affordability
Wage price index (WPI) growth *(Source: ABS)*	Household affordability and economic stability. Robust wage growth boosts consumer spending, increasing demand for housing and potentially driving up property prices. However, it can also increase labour costs for construction and development companies, reducing their capacity to provide new residential housing supply, placing further upward pressure on property prices. Conversely, stagnating wages constrain household budgets, reducing housing affordability and slowing market activity
Changes in interest rates (cash rate) *(Source: Reserve Bank of Australia)*	Household lending and finance
Construction costs (including annual growth) *(Source: ABS)*	Provides an indication of initial costs required to construct buildings such as houses. Fluctuations in construction costs has a direct impact on the feasibility of a development and subsequent sales price (e.g. increases in the prices of building material prices can directly influencing property prices.
Average value of loans for new housing construction *(Source: ABS)*	The average value of home loans being financed for the construction of new housing. The average value of a home loan provides a proxy indication of the extent of associated mortgage repayments.
First home buyer commitments *(Source: ABS)*	The number of first home buyers, rates of home ownership and housing affordability.
Suitable applications per vacancy for construction jobs *(Source: Jobs and Skills Australia)*	The availability of construction workers to build homes, infrastructure, services, facilities etc.
Construction trade apprenticeship completions *(Source: National Centre for Vocational Education Research)*	The extent to which workers are entering the labour force as skilled qualified construction workers. This helps to identify any gaps in suitability of qualified construction workers.

Queensland Government

Broader market context	
Indicative indicators	**What does it tell us about?**
Number of temporary skills shortages visas sponsored by construction industry *(Source: Department of Home Affairs Temporary Work (skilled) visa program)*	The availability of international skilled workers to fill construction jobs and help increase labour supply

Key actions

Each GMR will conclude with future monitoring and reporting improvements, listing actions, responsibilities and timeframes. Actions may be based on the report findings of that year, suggestions for improvements from stakeholders, or areas identified by the GMU for where improvements could be made. Typically, key actions will fall under one of the below categories:

- Alignment and implementation of ShapingSEQ
- Monitoring and reporting improvements

An example of a key action which has been recommended is to investigate where reporting improvements can be made to include infrastructure. It is acknowledged that infrastructure plays an integral part in delivering land supply for various land uses including housing and employment. The 2025 GMR will highlight the importance of infrastructure and will include a range of actions to further investigate how best to report on infrastructure in future releases of the GMR.

Queensland Government

Online dashboard

As part of the upcoming 2025 GMR, the GMU is in the final stages of refining a public facing online interactive Growth Monitoring Dashboard as a companion tool of the annual GMR publication. This represents a major advancement in the Queensland Government's commitment to data transparency and accessibility in growth monitoring reporting and would play a role in bringing Queensland into alignment with other State Planning Departments.

The dashboard was created as part of the response to the LSDM Report Peer Review recommendations, where Local Governments, industry bodies, and data users highlighted the need for clearer, more accessible data on housing and land availability. This feedback called for a platform that simplifies complex information and supports effective planning and policy decisions. The Growth Monitoring Dashboard addresses these needs, offering a centralised, interactive platform where users can view, analyse, and download key data that will help to guide Queensland's growth and development initiatives.

Design and development

To ensure the functionality and content of the Growth Monitoring Dashboard presents the highest value to end users, engagement with key stakeholders including Local Government, peak bodies and State agencies was undertaken at several stages throughout the design and development process. Feedback received during this engagement was used to inform the dashboard design and build. The GMU continues to refine the content of the dashboard as new indicators for inclusion are investigated and developed. The Growth Monitoring Dashboard design and build stages are summarised in **Figure 8**.
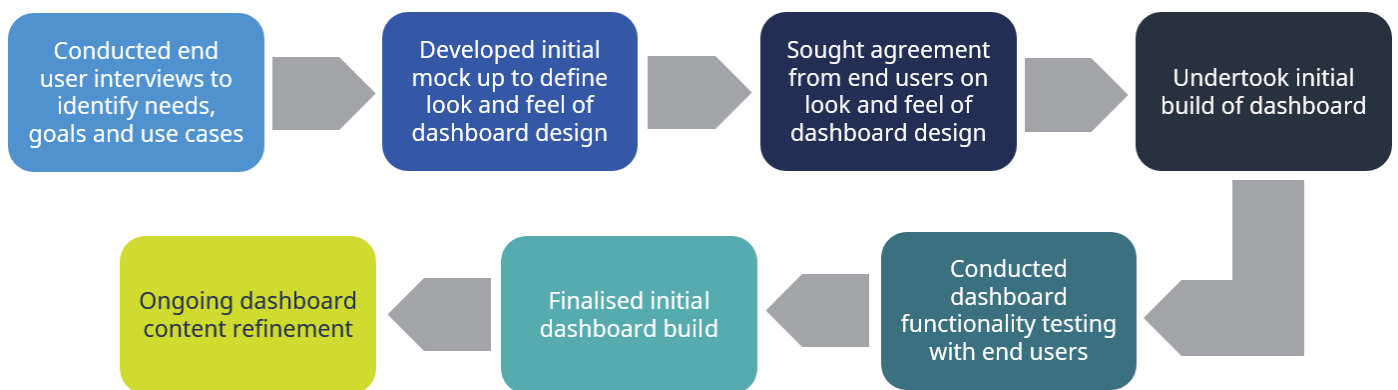

Figure 8: Growth Monitoring Dashboard design stages

Data content and structure

The Growth Monitoring Dashboard is intended to visualise a selection of contextual and policy indicators to compliment those contained within the annual GMR. These indicators are spread across key areas relevant to supply, demand, and regional growth. The indicators selected for inclusion in the dashboard are developed using data sources that are fit for purpose, available at a suitable geographic level, and updated at a reliable and consistent frequency. As such, to maintain overall usability and functionality, not all contextual indicators will be included on the dashboard. It is noted that some indicators appearing on the dashboard may be amended or replaced over time if identified as not providing value to end users, or if better suited / fit for purpose data sources become available.

Queensland Government

To maximise usability and ease of navigation, the dashboard will be organised into categories. This category-based structure, combined with interactive visuals, ensures users can easily navigate and explore data relevant to their specific needs. At present, indicators on the dashboard are grouped into the broad categories of:

- People and households
- Business and employment
- Housing market
- House and land supply
- Industrial land supply

It is noted that these categories may also be amended or updated over time to improve the useability, clarity and overall value for end users.

Most data available on the Growth Monitoring Dashboard is already publicly available from sources such as ABS, QGSO, RTA, REIQ, Jobs and Skills Australia etc. The dashboard provides a centralised location for this data and presents it in a standardised format to provide the greatest value to end users. The only data made available for download will be those which are already publicly available. Updates to policy indicators on the dashboard will only occur after ministerial approval and release of the annual growth monitoring report. Policy indicator data will not be available for download.

Scalability and future expansion of Growth Monitoring Dashboard

The Growth Monitoring Dashboard has been built with scalability in mind and is designed to evolve. As new data sets and indicators become available, these can be integrated to expand insights into housing, land supply, and broader growth trends across SEQ and ultimately Queensland. This flexibility will ensure that the dashboard remains a valuable, up-to-date resource for stakeholders, supporting evolving policy goals and providing a comprehensive, transparent view of growth monitoring reporting well into the future.

Queensland
Government

Future direction

There is growing public frustration and a potential loss in public confidence in Government and government services when regular reporting on land for housing and employment remains elusive.

At present, growth monitoring reporting in Queensland is limited to the SEQ region. While this reporting has, to date, helped inform and monitor the performance of planning policy and infrastructure investment in SEQ, expanding growth monitoring reporting to other regions in Queensland will transplant the same SEQ benefits to other regions, and should be considered as part of the future direction of growth monitoring reporting. Not doing so, presents several risks, including:

- Weakening implementation efforts to develop new regional plans which cover every corner of the State, in conjunction with infrastructure plans, that appropriately protect the lifestyle of our communities and cater for growth. Even in an era where data is in abundance; specifying, collecting, collating, analysing and visualising data on housing and employment land markets to improve the quality and consistency of the evidence base for regional and local plans and implementation programs remain complex and time-consuming.

- Constraining government and industry from pursuing new lucrative opportunities, minimising risk, or unearthing trends that would otherwise remain hidden. Data-driven innovation is transforming economies and communities and is emerging as an essential tool to improve growth and prosperity. Data can be used to make robust planning and investment decisions based on facts, trends, and patterns rather than the more variable tools of management expertise or 'gut feel'.

Potential benefits of expanding the SEQ growth monitoring reporting statewide, include, but are not limited to the following:

- Provide for a single point of convergence of statewide datasets and information on matters that relate to land supply, land use (zoning), dwelling forecasts and population projections in conjunction with Queensland Treasury, thereby lessening the burden on local governments to supply the same data to multiple state agencies.

- A more transparent and more consistent process of monitoring and reporting on land for housing and employment across different regions (i.e., at a state, regional, local, and community level)

- Monitoring land supply and development information to ensure local and state governments, with other relevant stakeholders, can be accurately informed about supply issues and respond accordingly.

- Monitoring local and regional land use policy performance and the combined effects on socio-economic change, housing, transport, energy, and infrastructure.

- Regular publications of Growth Monitoring Reports for regions outside of SEQ.

- Application of a range of sophisticated analytical and forecasting and modelling capabilities that explores, tracks and reports on a variety of growth and prosperity indicators.

- Research, insight, and trusted evidence to inform timely planning policy review and decision-making.

Queensland
Government

- Access to single statewide data sets that allow tracking of changes over time (time aware spatial features) which all are essential for planning, assessment, forecasting and monitoring functions of various government agencies.

- Supply trusted and transparent data-driven evidence to inform planning policy reviews and infrastructure actions to support adequate land supply and preferred growth pattern.

- Improved understanding of the dynamics of different land and housing market across Queensland in response to changes in accessibility, land use policy and infrastructure investment outcomes.

Queensland
Government

Further information

This section contains a list of information sources referred to in this position paper:

- Indicator Dictionary for ShapingSEQ 2023: <u>Shaping SEQ Indicator Dictionary</u>
- Land Supply and Development Reports: <u>LSDM Online Reports 2018 to 2021</u>
- Land Supply and Development Monitoring Peer Review: <u>LSDM Peer Review Report</u>
- Land Supply and Development Monitoring Peer Review Implementation Strategy: <u>LSDM Peer Review Implementation Strategy</u>
- Measures that Matter online dashboard: <u>Measures that matter</u>
- South East Queensland (SEQ) Market Factors Report: <u>SEQ Market Factors Reports 2019 to 2021</u>
- ShapingSEQ 2023 (Regional Plan for SEQ): <u>ShapingSEQ 2023</u>

Examples of dashboards and mapping portals prepared by other states in relation to growth monitoring reporting include:

- New South Wales Planning Greater Sydney Urban Development Program Dashboard: <u>Greater Sydney Urban Planning Development dashboard</u>
- South Australian Planning and Land Use Services Land Supply Dashboard: <u>PlanSA Land Supply Dashboard</u>
- Western Australia department of Planning, Lands and Heritage Urban Growth Monitor: <u>WA Urban Growth Monitor Dashboard</u>
- Victorian Department of Planning Urban Development Program: <u>VicPlan Urban Development Program Map</u>

Queensland
Government