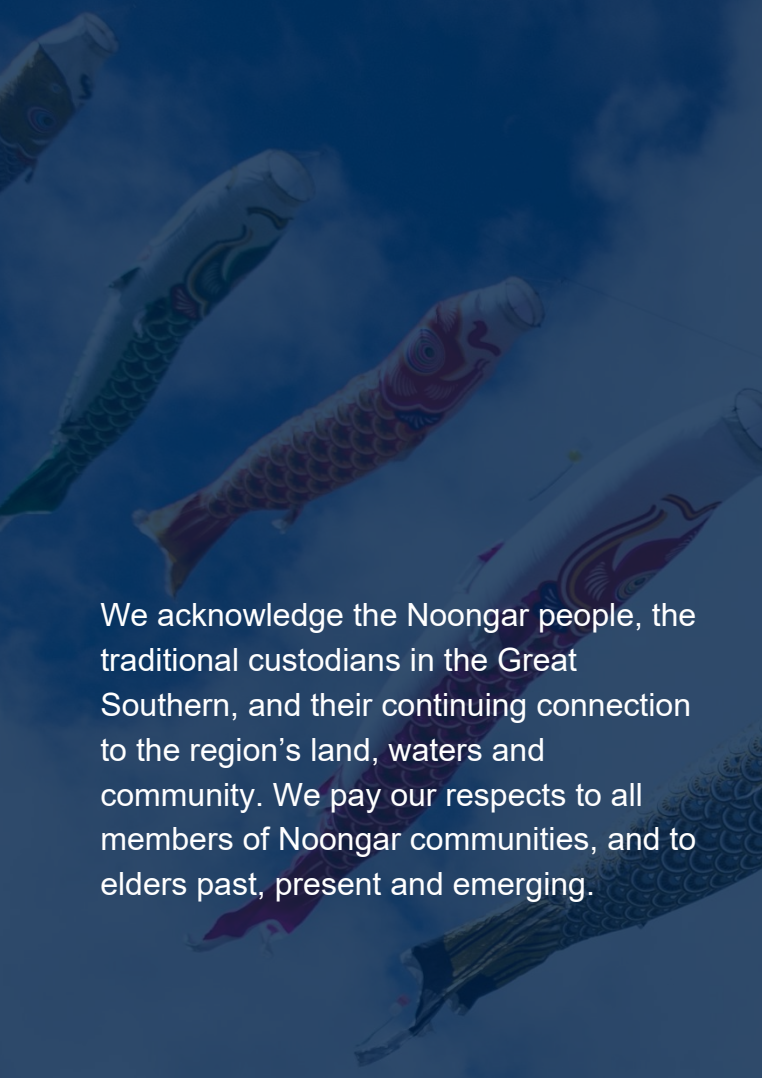


# Great Southern Development Commission Housing & Land Snapshot



December 2021





We acknowledge the Noongar people, the traditional custodians in the Great Southern, and their continuing connection to the region's land, waters and community. We pay our respects to all members of Noongar communities, and to elders past, present and emerging.

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Prepared by Urbis for the Great Southern Commission.

The information and data contained in this document were predominantly gathered from Landgate and supplemented with data acquired from REIWA and PriceFinder. No person should act on the basis of any matter contained in this document without considering and, if necessary, taking appropriate professional advice. Neither the Commission, Urbis, or any of the employees at these organisations undertake responsibility to any person or organisation in respect to this document.



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# Region Overview



The Great Southern region is located on the south coast of Western Australia, adjoining the Southern Ocean, where the coast extends for approximately 250 kilometres.

The Great Southern region is made up of 11 local government authorities: Albany, Broomehill-Tambellup, Cranbrook, Denmark, Gnowangerup, Jerramungup, Katanning, Kent, Kojonup, Plantagenet and Woodanilling.

The Great Southern has a growing reputation for hosting significant festivals and exhibitions and is renowned for its natural and built tourist attractions. These include a rugged coastline, white sandy beaches, tall timber forests, wildflowers and wineries.

# Economic Overview



**The Great Southern region supports approximately 25,000 jobs and produces an annual economic output of \$9.2 billion (based on REMPLAN data for 2021). The key industries in the region are farming and agriculture and health care and social assistance.**

The successful management of COVID-19 in Western Australia, high commodity prices, government stimulus measures and strengthening population growth in 2019 and early 2020 have translated to improving household and business confidence in the Great Southern region.

Unemployment levels in the region have been steady but low at 3.6% since December 2020. Businesses are reporting significant challenges attracting and accommodating staff in the region.

There are a number of major projects in the region which are supporting economic activity, such as:

- Albany Ring Road (States 2 & 3);
- TAFE Workshops;
- Albany Waterfront Hotel;
- Mt Lockyer Primary School;
- Western Power Depot;
- Middleton Beach Foreshore Revitalisation;
- Leeuwin Coast Aquaculture;
- MSWA Multipurpose Facility; and
- SES Headquarters.



# Great Southern Residential Overview



The Great Southern region's housing markets are characterised by larger urban areas such as Albany and Denmark, small established towns and rural properties.

Overall, the region's established housing market strengthened in the first half of 2021. In the first half of 2021, transactions for houses increased to the highest levels in the last ten years and the median house price for the region increased by 12% over the year to June 2021.

Rental markets have continued to tighten in the first half of 2021. Stakeholder liaison indicated that there is a lack of rental stock available at the time of reporting with rents also being the highest they have been in the last ten years.

The number of land sales decreased to 107 in the first half of 2021, falling by 32% from the previous half. However the vacant land sales recorded are still high in comparison to past halves as a result of the Homebuilder and Building Bonus stimulus measures for new home construction helped increase building activity across the Great Southern region.

The economic development and liveability of the Great Southern region needs to be supported by the availability of housing. This summary demonstrates that there are a range of housing availability challenges present.

# Great Southern Residential Overview

## Key Statistics

**\$384,000**

Median House Price,  
H1 2021

**+13%**

Median House Price  
Growth Rate, H1 2020  
– H1 2021

**\$315,000**

Median Unit Price,  
H1 2021

**+57%**

Median Unit Price  
Growth Rate,  
H1 2020 – H1 2021

**\$175,500**

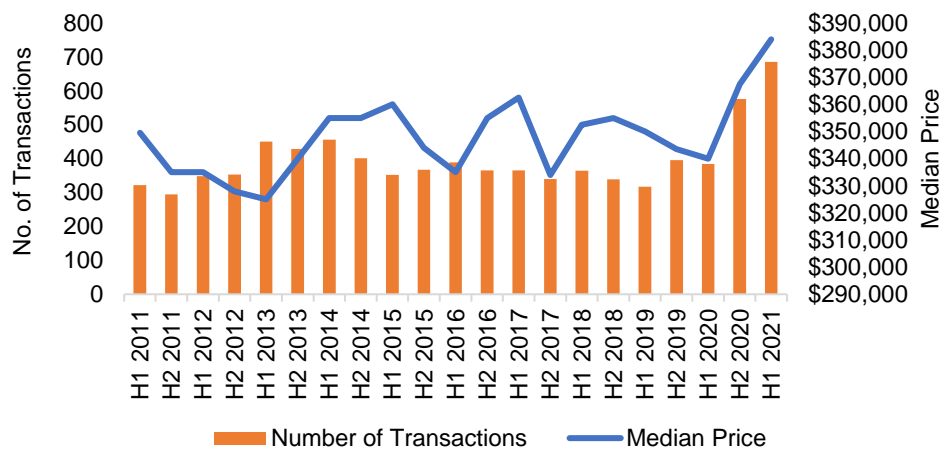
Median Vacant Land  
Price, H1 2021

**+20%**

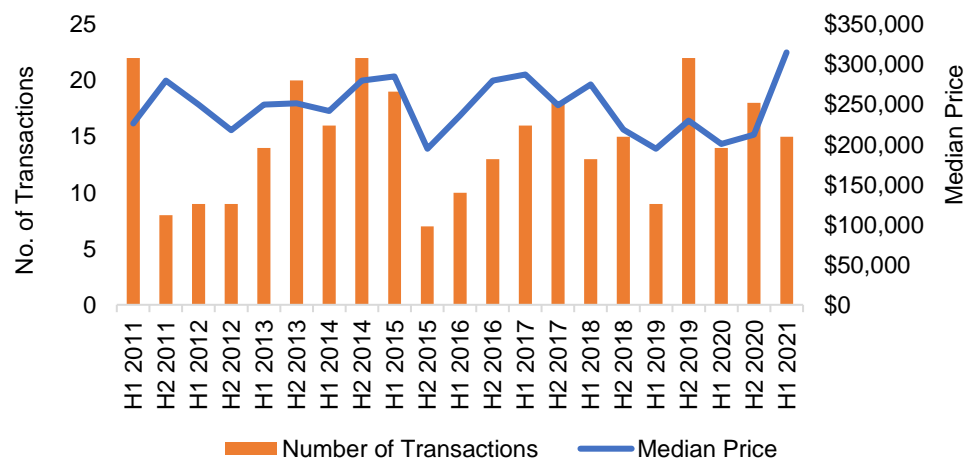
Median Vacant Land  
Price Growth Rate, H1  
2020 – H1 2021

## Residential Market Trends 2011 - 2021

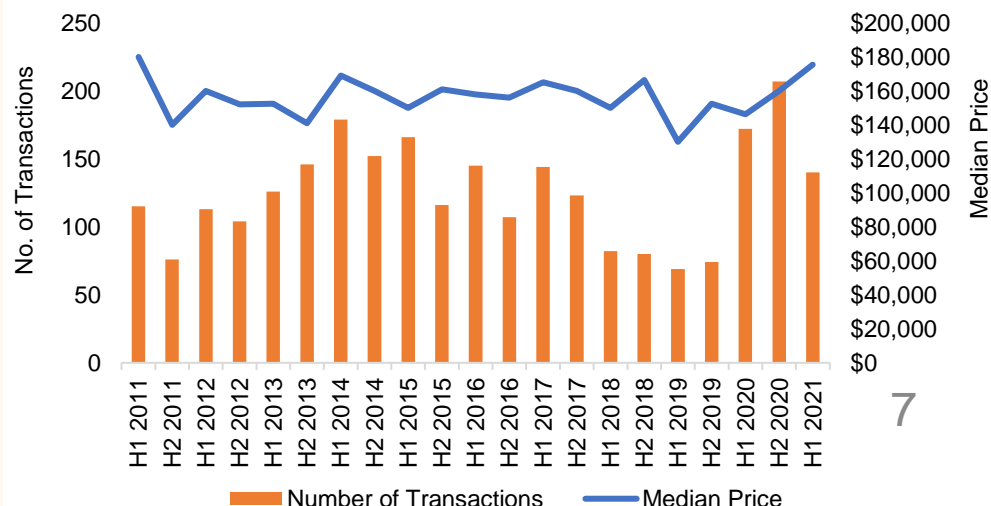
### House Price and Transaction Volume



### Unit Price and Transaction Volume



### Vacant Land Price and Transaction Volume



# Great Southern Residential Overview

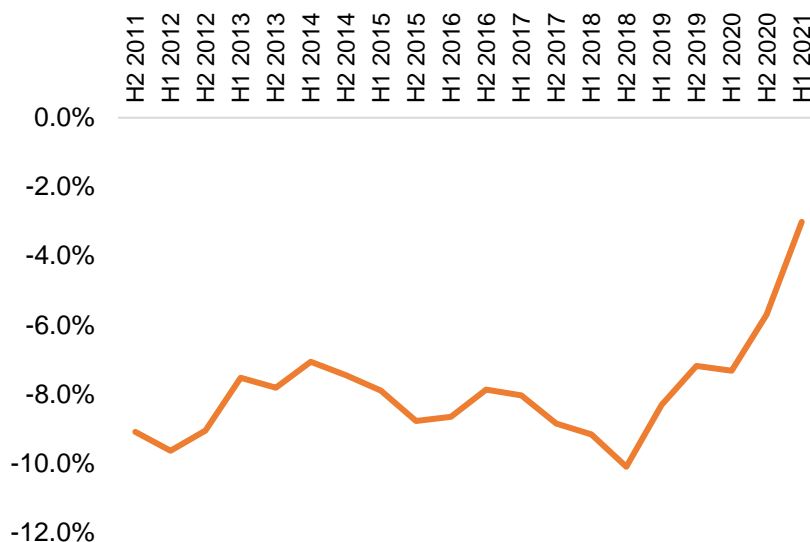
**-3%**

Average  
Discount On  
Listing Price,  
H2 2020 – H1  
2021

**69**

Average  
Days to Sell

## Discount on Original Price 2011 - 2021



## Residential Market Summary, January – June 2021

Sales Summary	House	Units	Vacant Land
Median Price	\$384,000	\$315,000	\$175,500
10-Year Average	\$350,000	\$255,000	\$157,000
Variation from Avg.	9.7%	23.5%	11.8%
Number of Transactions (6 months)	685	15	140

Price Growth	House	Unit	Vacant Land
1 Year	11.1%	50.5%	20.0%
3 Year	9.6%	10.0%	17.0%
5 Year	14.3%	27.9%	11.1%
10 Year	11.1%	33.6%	-2.5%

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	\$311,250	\$295,000	\$369,750	\$430,000	\$560,000	\$384,000
Median Unit Price	\$185,000	\$290,000	\$315,000	-	-	\$315,000
Number of House Sales (12 months)	6	131	342	177	19	685
Number of Unit Sales (12 months)	1	5	7	-	-	15



# Great Southern Residential Overview

## Key Statistics

286

Dwellings Leased, H1 2021

\$385

Median Weekly House Rent, H1 2021

\$331

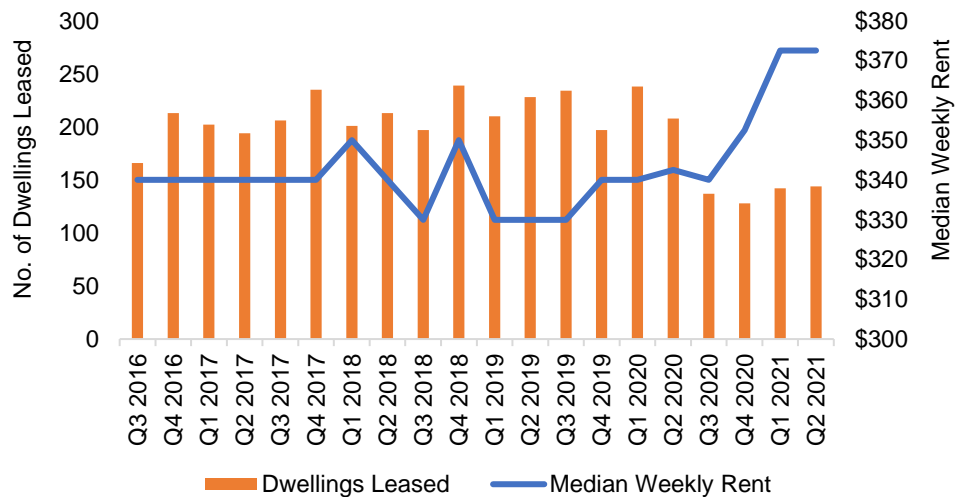
Median Weekly Unit Rent, H1 2021

23

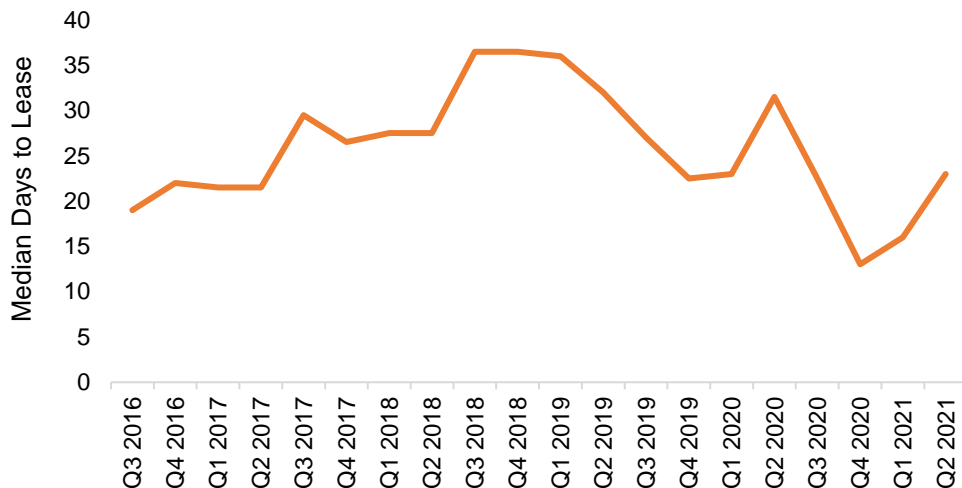
Median Days to Lease, June Quarter 2021

## Rental Market Trends 2011 - 2021

### Rent Price and Leasing Volume



### Median Days to Lease



## Rental Market Summary, January – June 2021

Weekly Rent Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Rent	\$290	\$315	\$378	\$430	\$484	\$385
Median Unit Rent	-	\$323	\$354	-	-	\$331

\* Weighted Average of March and June 2021 Quarters

# City of Albany

## Residential Overview



### Residential Market

The City of Albany has the largest residential market in the Great Southern region, accounting for over 62% of dwellings in the region. Over 38% of dwellings in the City are owned outright and nearly 32% are owned with a mortgage.

The Albany market experienced a substantial level of transaction and price growth between June 2020 and June 2021, with median house prices increasing by 12%. The lower quartile for Albany has grown substantially in the last year by 17% from \$360,000 to \$419,250. Increases in the lower quartile price in Albany over the years has reduced affordability in the area. The median price for units additionally grew significantly by 64% in the same period though this was influenced by the mix of units sold.

Given the high proportion of over 55's in Albany, there are approximately ten retirement villages in the LGA.

Vacant land sales increased in 2020 as a result of stimulus measures and low interest rates. Sales levels declined in H1 2021 as stimulus was removed from the market and labour constraints resulted in extended building timeframes.

The rental market represents approximately 27% of the dwellings. Public housing accounts for 16% of the rented dwellings in the City of Albany. The rental market is relatively tight, with increasing rents and low availability of stock.

### Population and Demographics

The City of Albany is the largest LGA in the Great Southern Region in terms of population with an estimated 38,296 residents. Since 2016 Census, the total estimated resident population has grown by 2.7% according to the ABS.

The median weekly household income for the City of Albany is approximately \$1,209.



# City of Albany

## Residential Overview

### Key Statistics

**\$404,500**

Median House Price,  
H1 2021

**+12%**

1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

**\$315,000**

Median Unit Price,  
H1 2021

**+64%**

1 Year Median Unit  
Price Growth Rate,  
H1 2020 – H1 2021

**\$195,000**

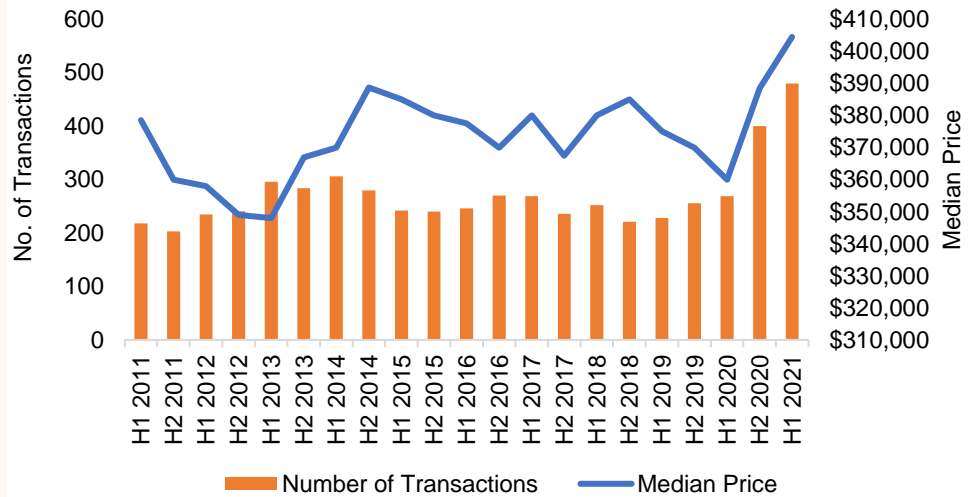
Median Vacant Land  
Price, H1 2021

**+30%**

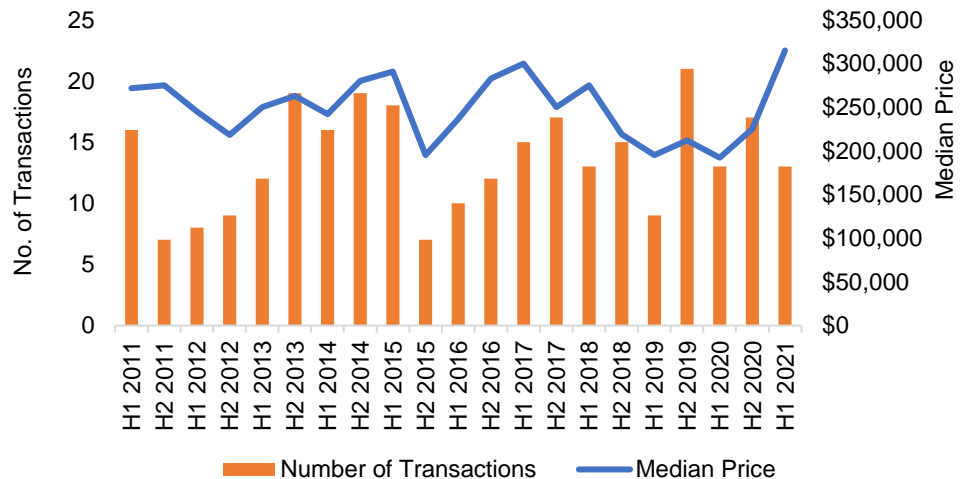
1 Year Median Vacant  
Land Price Growth  
Rate, H1 2020 – H1  
2021

### Residential Market Trends 2011 - 2021

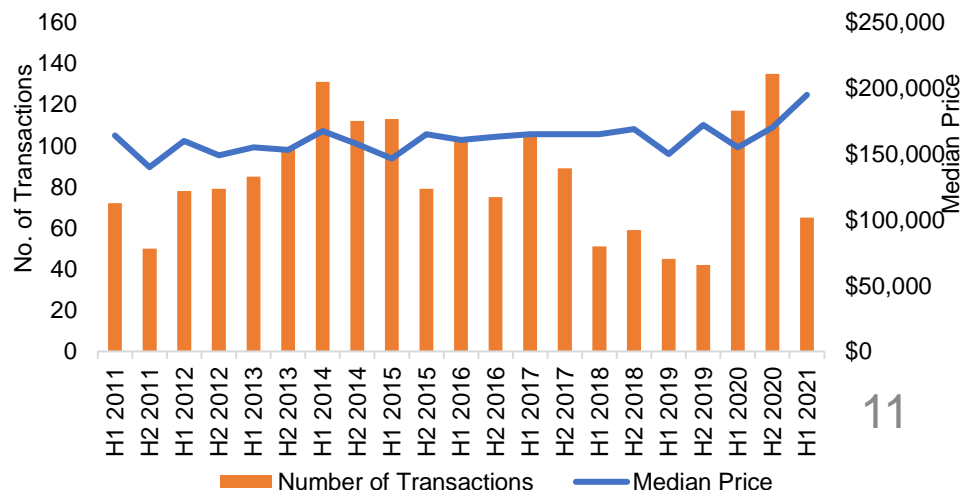
#### House Price and Transaction Volume



#### Unit Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



# City of Albany

## Residential Overview

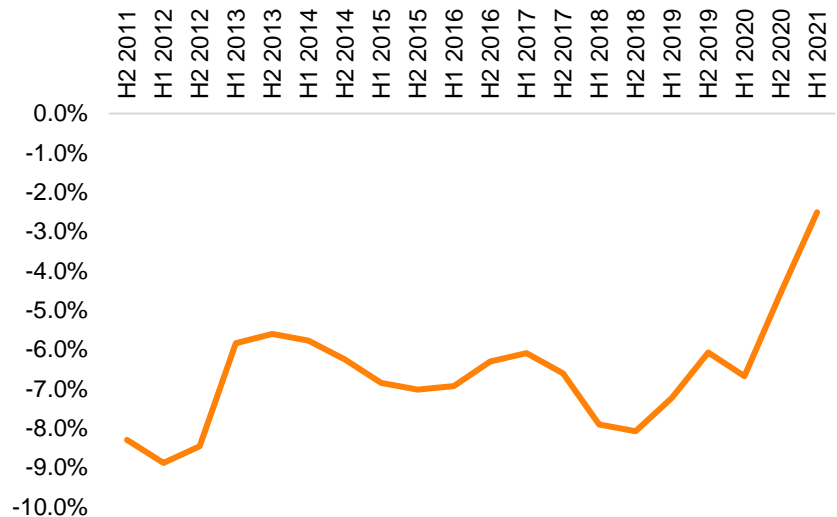
**-3%**

Average  
Discount On  
Listing Price,  
H2 2020 – H1  
2021

**63**

Average Days to  
Sell

### Discount on Original Price 2011 - 2021



### Residential Market Summary, January – June 2021

Sales Summary	House	Units	Vacant Land
Median Price	\$404,500	\$315,000	\$195,000
10-Year Average	\$375,000	\$255,000	\$160,000
Variation from Avg.	7.9%	23.5%	21.9%
Number of Transactions (6 months)	480	13	65

Price Growth	House	Unit	Vacant Land
1 Year	10.3%	57.6%	25.8%
3 Year	6.1%	10.0%	18.2%
5 Year	6.1%	27.9%	21.5%
10 Year	7.0%	11.4%	18.9%

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	\$595,000	\$307,500	\$375,000	\$440,000	\$580,000	\$404,500
Median Unit Price	\$185,000	\$290,000	\$329,250	-	-	\$315,000
Number of House Sales (12 months)	2	75	241	139	18	480
Number of Unit Sales (12 months)	1	5	6	-	-	13



# City of Albany

## Residential Overview

### Key Statistics

276

Dwellings Leased, H1 2021

\$385

Median Weekly House Rent, H1 2021

\$335

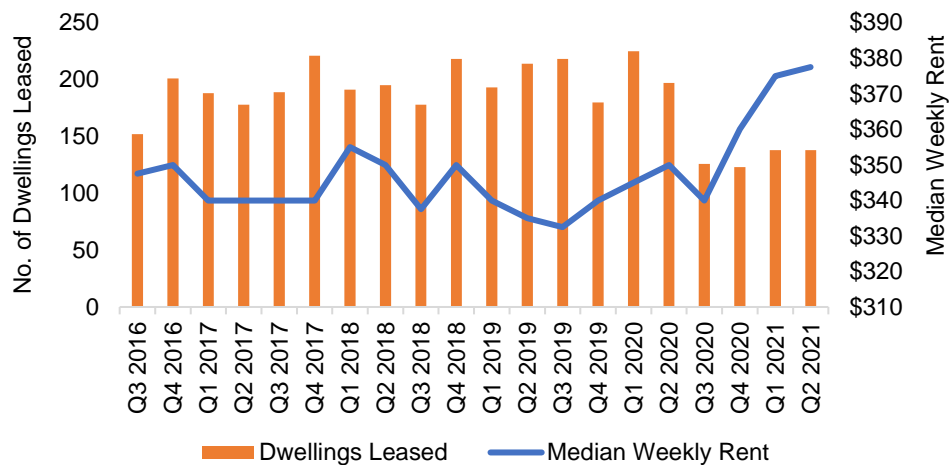
Median Weekly Unit Rent, H1 2021

23

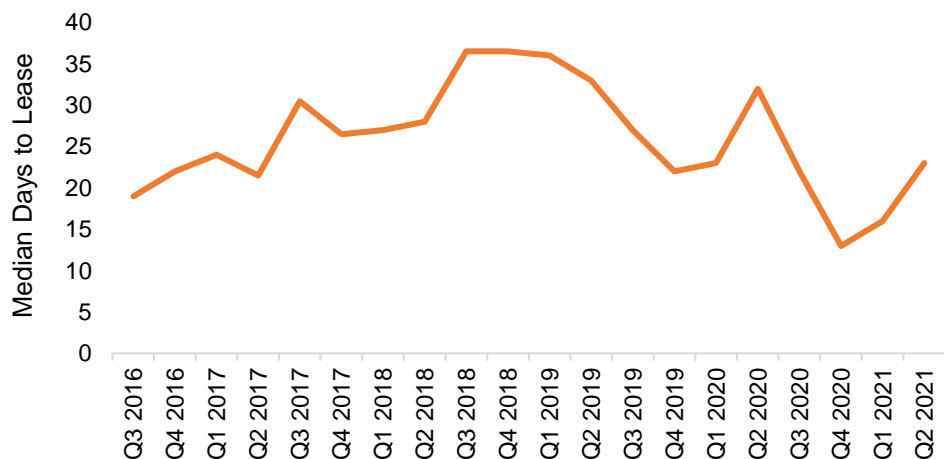
Median Days to Lease, June Quarter 2021

### Rental Market Trends 2011 - 2021

Rent Price and Leasing Volume



Median Days to Lease



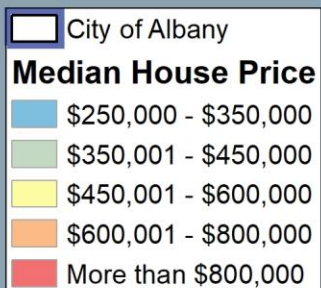
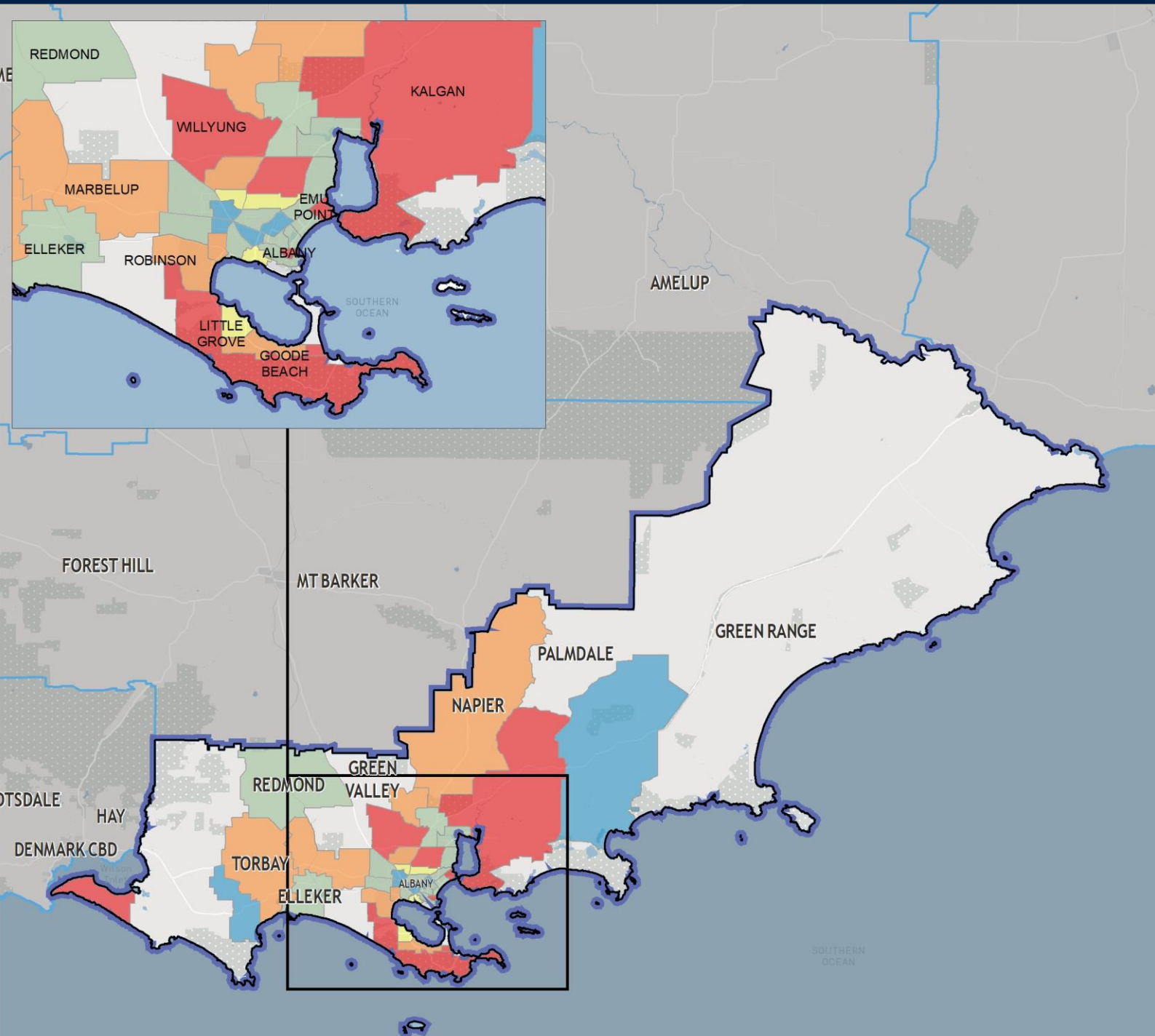
### Rental Market Summary, January – June 2021

Weekly Rent Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Rent	\$290	\$315	\$377	\$433	\$484	\$385
Median Unit Rent	-	\$324	\$354	-	-	\$335

\* Weighted Average of March and June 2021 Quarters

# City of Albany

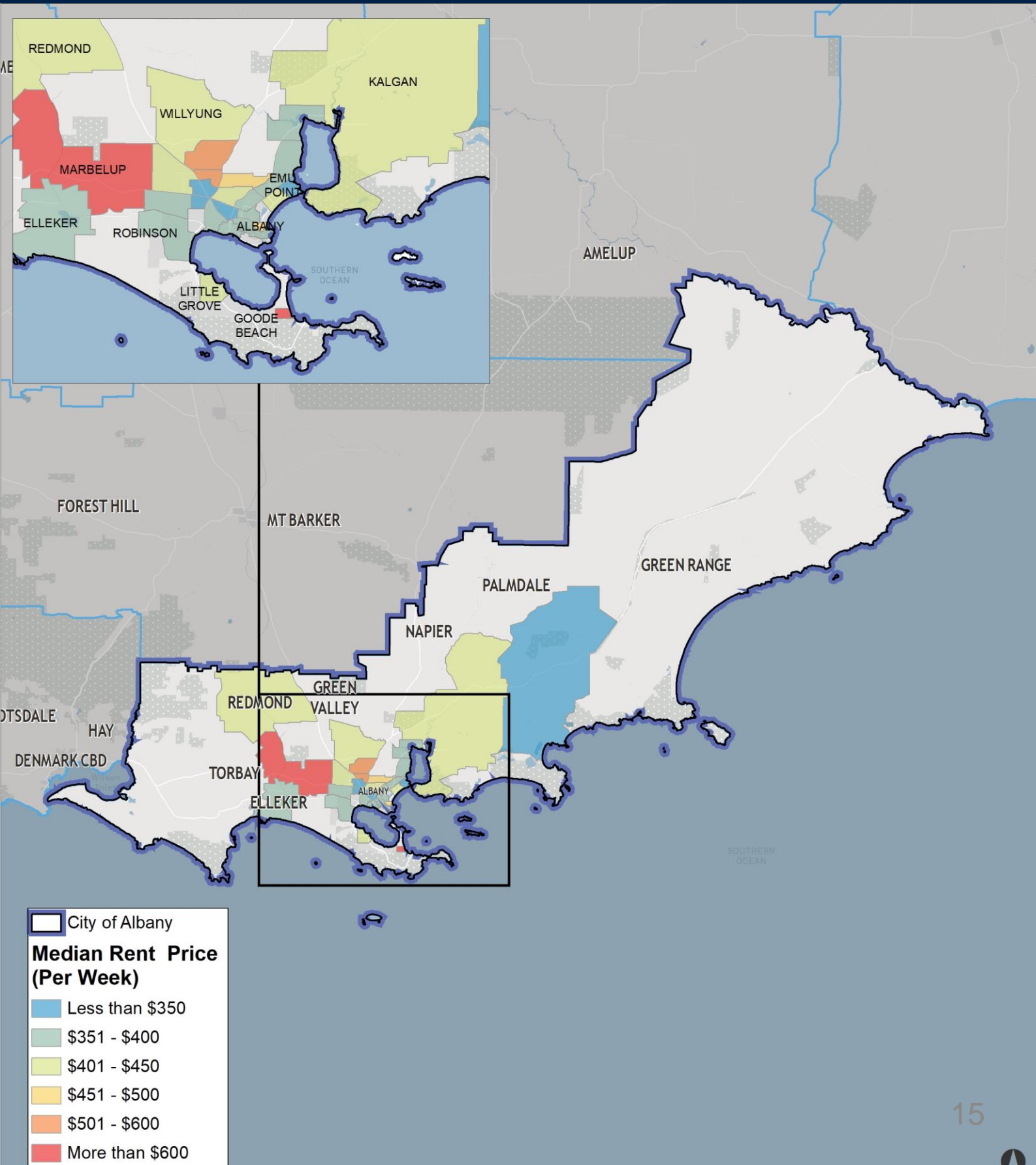
## Residential Overview





# City of Albany

## Residential Overview



# City of Albany

## Residential Overview

Suburb	House		Unit		Vacant Land		Median House Rent (per week)	Median Unit Rent (per week)
	Median Price	No. of Sales	Median Price	No. of Sales	Median Price	No. of Sales		
Albany	\$594,000	27	-	-	\$270,000	5	\$386.00	\$341.43
Bayonet Head	\$429,500	54	-	-	\$169,000	13	\$394.78	-
Big Grove	\$660,000	3	-	-	-	-	-	-
Centennial Park	\$338,500	8	\$250,000	1	-	-	\$320.00	\$340.00
Collingwood Heights	\$387,500	12	-	-	\$125,000	3	\$366.25	-
Collingwood Park	\$430,000	7	-	-	\$330,000	1	\$410.00	-
Elleker	\$400,000	2	-	-	-	-	\$400.00	-
Emu Point	\$810,000	3	-	-	-	-	\$350.00	-
Gledhow	\$380,000	12	-	-	\$165,000	5	\$396.67	-
Goode Beach	\$975,000	3	-	-	\$237,500	4	\$850.00	-
Kalgan	\$805,000	6	-	-	-	-	\$440.00	-
King River	\$430,000	2	-	-	-	-	-	-
Kronkup	\$250,000	3	-	-	-	-	-	-
Lange	\$457,500	6	-	-	\$139,000	5	\$500.00	-
Little Grove	\$600,000	28	-	-	\$372,500	1	\$401.43	-
Lockyer	\$260,000	19	-	-	\$91,250	2	\$315.83	\$280.00
Lower King	\$416,000	20	-	-	\$185,000	3	\$396.25	-
Manypeaks	\$312,500	1	-	-	-	-	\$320.00	-
Marbelup	\$630,000	3	-	-	\$650,000	1	\$610.00	-
Mckail	\$420,000	70	-	-	\$207,500	10	\$411.43	-
Middleton Beach	\$950,000	5	-	-	\$680,000	1	\$457.27	\$393.33
Millbrook	\$710,000	1	-	-	-	-	-	-
Milpara	\$500,000	5	-	-	\$200,000	2	\$595.00	-
Mira Mar	\$457,500	38	\$355,000	3	\$250,000	5	\$380.00	\$335.00
Mount Clarence	\$422,500	11	\$455,000	1	\$235,000	1	\$366.00	\$321.43
Mount Elphinstone	\$670,000	1	-	-	-	-	-	-
Mount Melville	\$365,000	26	-	-	\$159,000	1	\$378.00	\$320.00
Napier	\$710,000	1	-	-	-	-	-	-
Nullaki	\$1,400,000	2	-	-	-	-	-	-
Orana	\$317,500	30	\$285,000	1	\$199,000	1	\$335.83	\$273.00
Redmond	\$427,500	2	-	-	-	-	\$450.00	-
Robinson	\$699,000	4	-	-	-	-	\$400.00	-
Seppings	\$425,000	1	-	-	-	-	-	-
Spencer Park	\$342,500	61	-	-	\$115,000	1	\$356.36	-
Torbay	\$700,000	1	-	-	-	-	-	-
Torndirrup	\$880,000	1	-	-	\$732,500	2	-	-
Walmsley	\$970,000	1	-	-	-	-	-	-
Warrenup	\$637,500	14	-	-	\$225,000	2	\$548.00	-
Willyung	\$920,000	1	-	-	\$255,000	1	\$440.00	-
Yakamia	\$422,500	39	-	-	\$400,000	5	\$406.11	\$320.00



# Shire of Denmark

## Residential Overview



### Residential Market

The 2016 Census determined that there were over 2,200 dwellings in the Shire of Denmark, of which 71% were owner occupied.

Denmark's residential market is currently at a ten-year peak, recording 84 transactions in the first half of 2021. Median house prices were at \$462,000.

Construction activity is also increasing. Median price for vacant land has increased substantially from H2 2020 by 33% and transaction levels were stable in H1 2021.

There are limited rental properties on the market and this has translated into increasing rents (up to \$430 per week, from \$330 12 months ago).

### Population and Demographics

The ABS estimates that the current resident population in the Shire of Denmark is 6,370 people which has grown by 1.4% per year on average since 2016.

Unemployment in the Shire of Denmark for the March Quarter of 2021 was lower than the Regional WA and Western Australia unemployment rates at 3.7%.

The median weekly household income in the Shire of Denmark is \$1,013.

# Shire of Denmark

## Residential Overview

### Key Statistics

**\$464,000**

Median House Price,  
H1 2021

**+16%**

1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

**5**

Unit Sales  
Transactions  
recorded since 2011

**\$216,000**

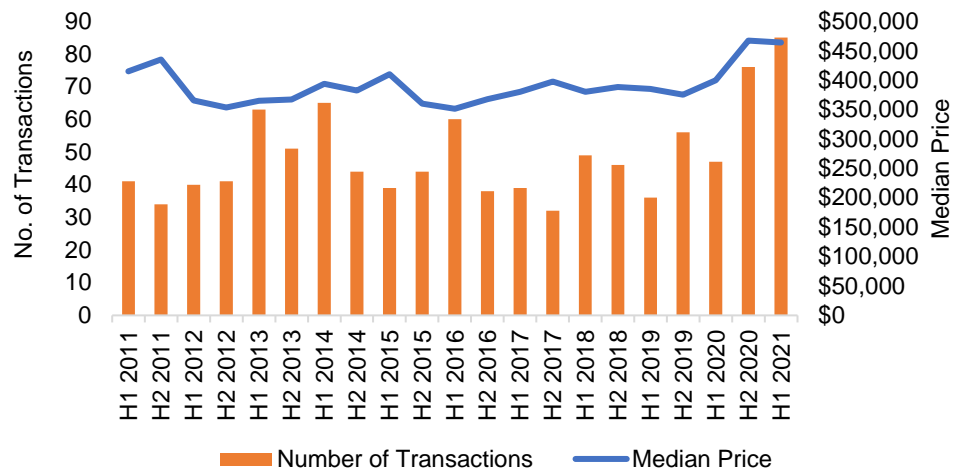
Median Vacant Land  
Price, H1 2021

**+20%**

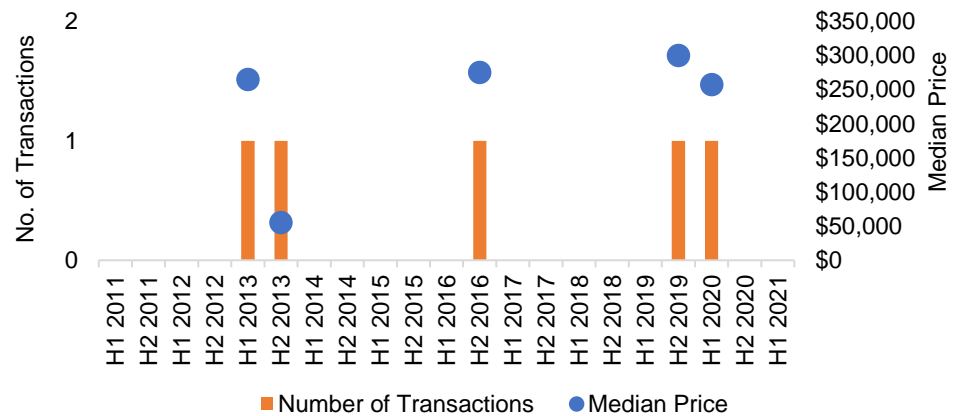
1 Year Median Vacant  
Land Price Growth  
Rate, H1 2020 – H1  
2021

### Residential Market Trends 2011 - 2021

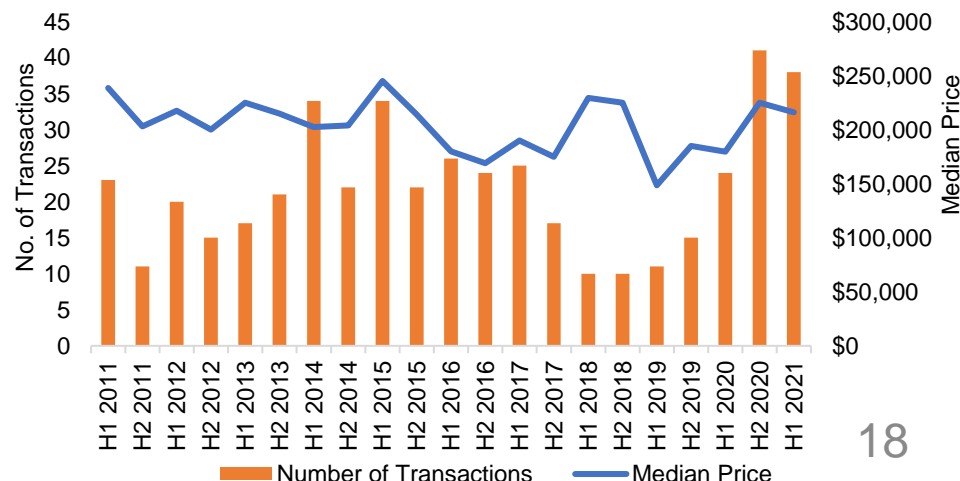
#### House Price and Transaction Volume



#### Unit Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



# Shire of Denmark

## Residential Overview

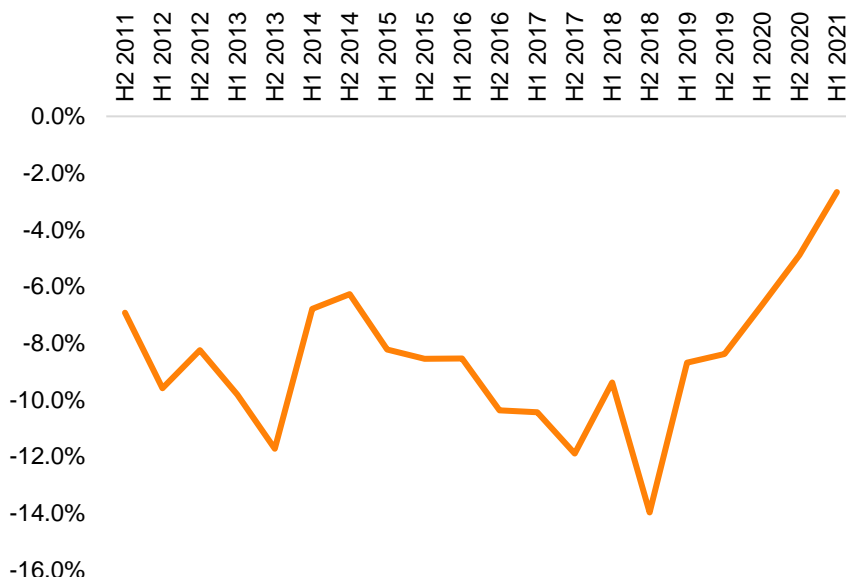
**-3%**

Average  
Discount On  
Listing Price,  
H2 2020 – H1  
2021

**81**

Average  
Days to Sell, H1  
2021

### Discount on Original Price 2011 - 2021



### Residential Market Summary, January – June 2021

Sales Summary	House	Units	Vacant Land
Median Price	\$464,000	-	\$216,000
10-Year Average	\$393,000	\$265,000	\$205,000
Variation from Avg.	18.1%	-	5.4%
Number of Transactions (6 months)	85	-	38

Price Growth	House	Unit	Vacant Land
1 Year	19.8%	-	20.3%
3 Year	24.4%	-	-5.9%
5 Year	29.0%	-	20.0%
10 Year	15.5%	-	-9.4%

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	\$311,250	\$445,000	\$480,000	\$428,500	-	\$464,000
Median Unit Price	-	-	-	-	-	-
Number of House Sales (12 months)	2	18	45	16	-	85
Number of Unit Sales (12 months)	-	-	-	-	-	-



# Shire of Denmark

## Residential Overview

### Key Statistics

6

Dwellings Leased, H1 2021

\$373

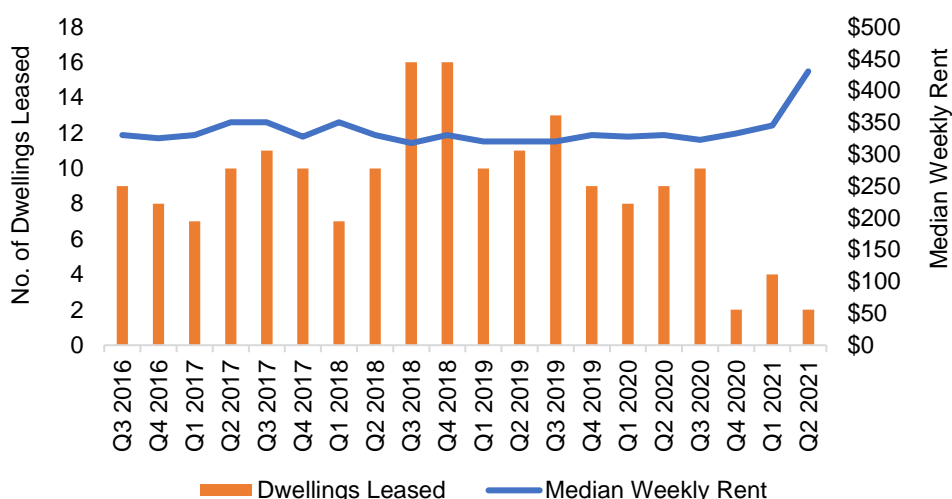
Median Weekly House Rent, H1 2021

23

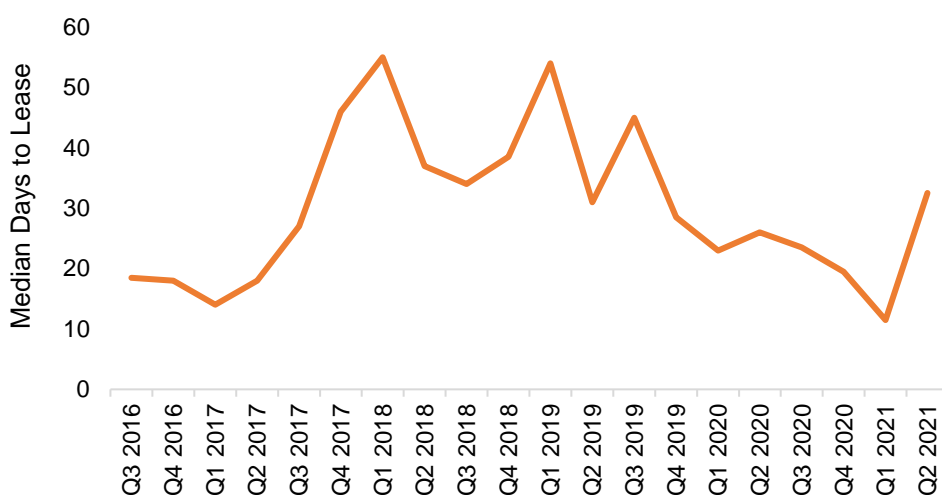
Median Days to Lease, June Quarter 2021

### Rental Market Trends 2011 - 2021

#### Rent Price and Leasing Volume



#### Median Days to Lease



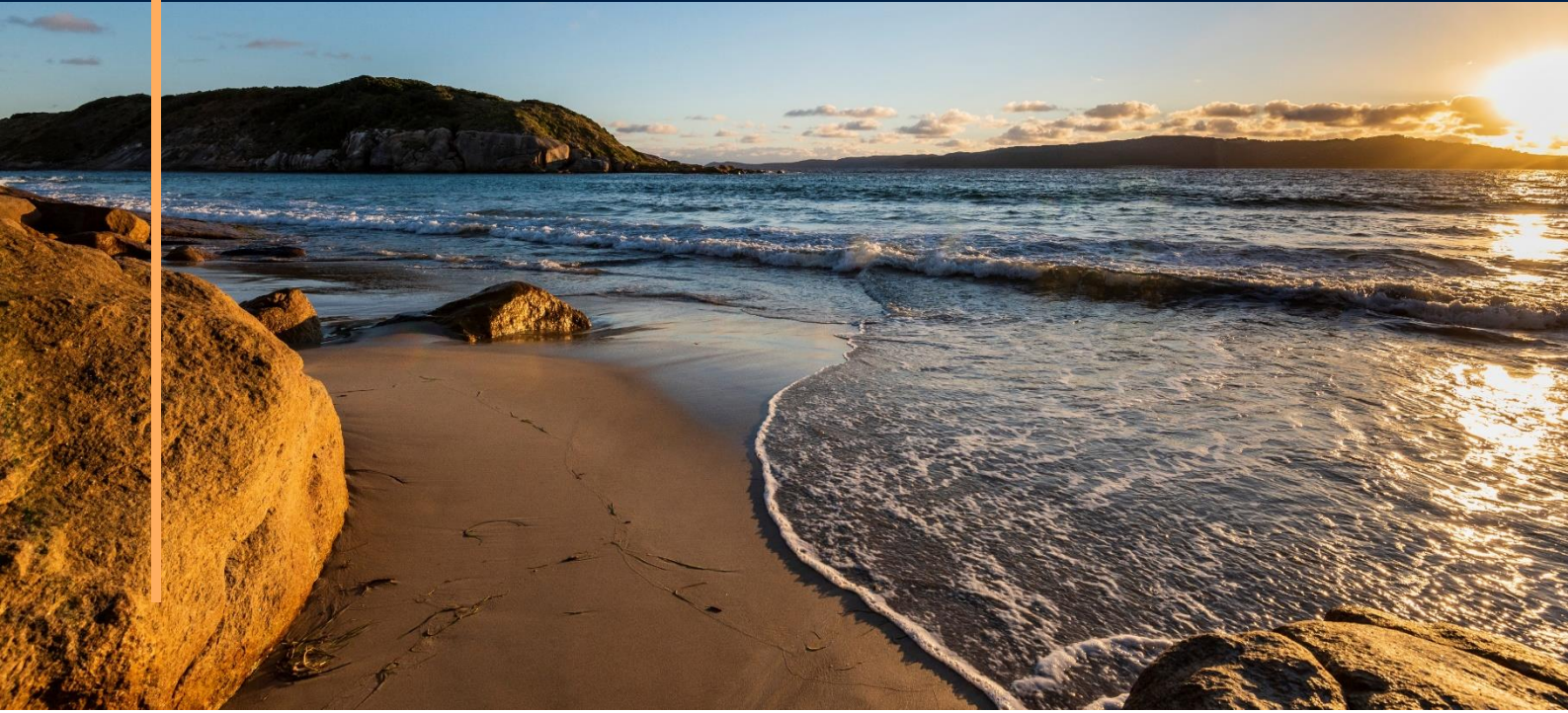
### Rental Market Summary, January – June 2021

Weekly Rent Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Rent	-	-	\$385	\$425	-	\$373
Median Unit Rent	-	-	-	-	-	-

\* Weighted Average of March and June 2021 Quarters

# Shire of Jerramungup

## Residential Overview



### Residential Market

The Shire of Jerramungup is the eastern most Shire of the Great Southern region and has a rich agricultural history and is developing a healthy tourism sector. The 2016 Census recorded a total of 404 dwellings in the Shire of Jerramungup, a majority of which are owner occupied or rented. Almost 40% of dwellings are owned outright and another 24% are owned with a mortgage. Rented dwellings and dwellings occupied rent free in the Shire total over 34% of the residential market.

Jerramungup's residential market is at ten year peak in terms of house and vacant land transactions. In H1 2021, Jerramungup recorded its most sales for a half in ten years for houses and vacant land with the number of transactions increasing by 72% from H2 2020.

In the rental market, 40% of dwellings are rented through the informal market. Worker housing also has a strong presence in the area accounting for 29% of rented dwellings. A further 17% are provided through the State Housing Authority.

### Population and Demographics

The Shire of Jerramungup has a current estimated resident population of 1,130 people of which almost half live in Bremer Bay. Since 2016, the Shire of Jerramungup has experienced almost no population growth with the number of residents rising or falling by approximately five people each year.

Unemployment in the Shire of Jerramungup is low at 2.2% (March quarter 2021) with the agriculture, forestry and fishing sector providing over 60% of jobs to the resident population.

The median weekly household income in Jerramungup is higher in comparison to most other local governments in the Great Southern at \$1,284 per week.

# Shire of Jerramungup

## Residential Overview

### Key Statistics

**\$355,000**

Median House Price,  
H1 2021

**+23%**

1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

**\$120,000**

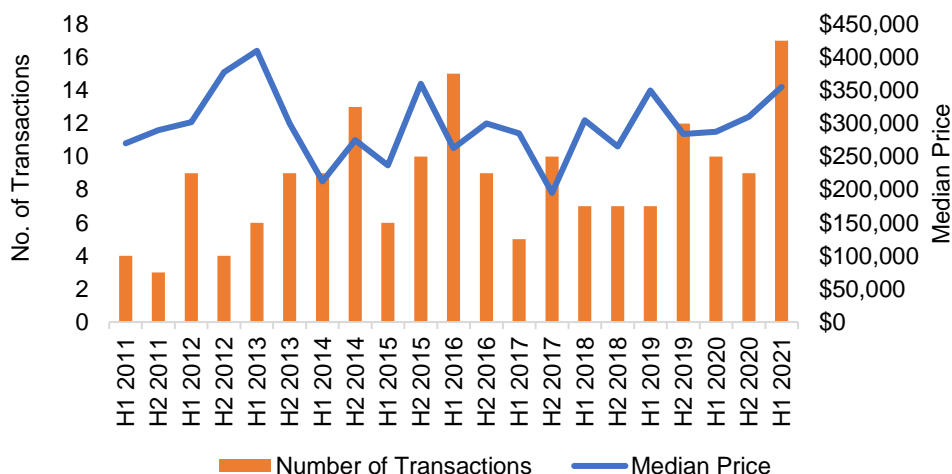
Median Vacant Land  
Price, H1 2021

**+54%**

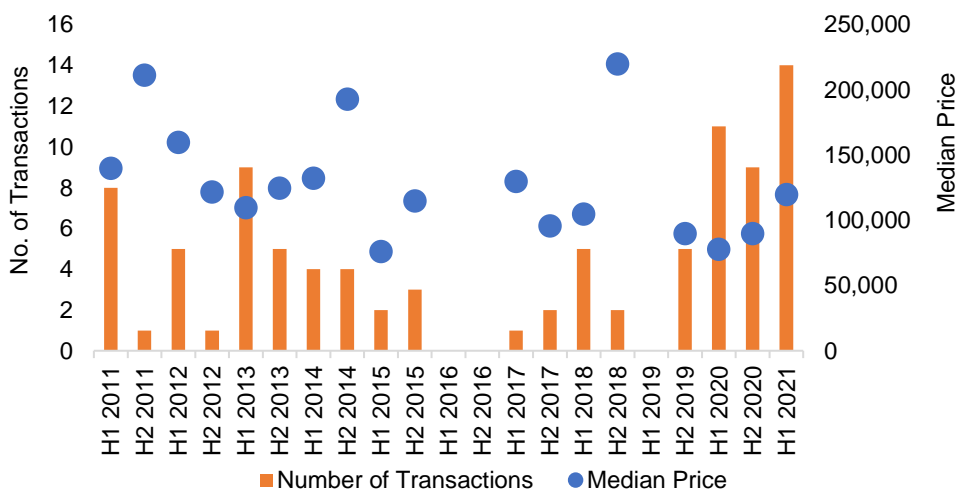
1 Year Median Vacant  
Land Price Growth  
Rate, H1 2020 – H1  
2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



### Residential Market Summary, January – June 2021

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	\$495,000	\$290,000	\$350,000	\$426,000	-	\$355,000
Number of House Sales (12 months)	1	5	7	4	-	17

Sales Summary	House	Vacant Land	Price Growth	House	Vacant Land
Median Price	\$355,000	\$120,000	1 Year	47.8%	53.8%
10-Year Average	\$300,000	\$115,000	3 Year	39.3%	14.3%
Variation from Avg.	18.3%	4.3%	5 Year	56.4%	-
Number of Transactions (6 months)	17	14	10 Year	183.3%	-14.3%



# Shire of Jerramungup

## Overview

### Key Statistics

1

Dwellings Leased, H1 2021

\$260

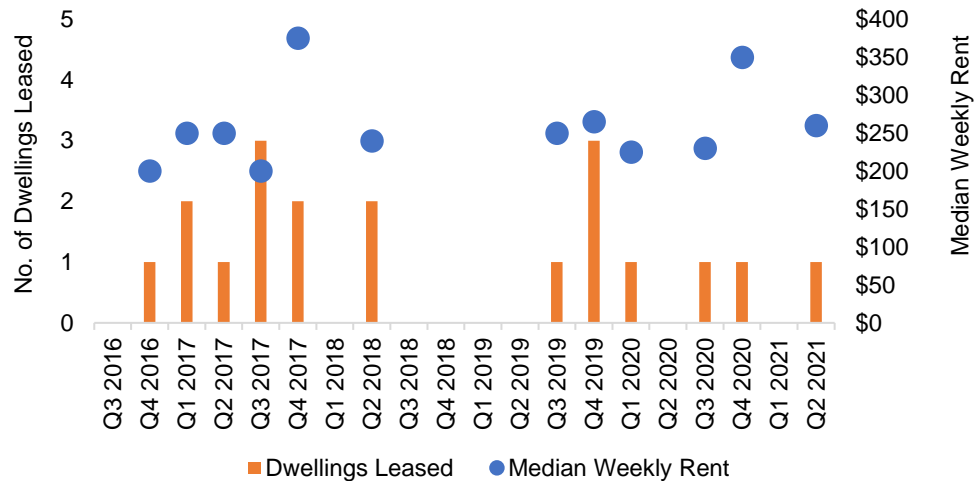
Weekly Unit Rent, H1 2021

41

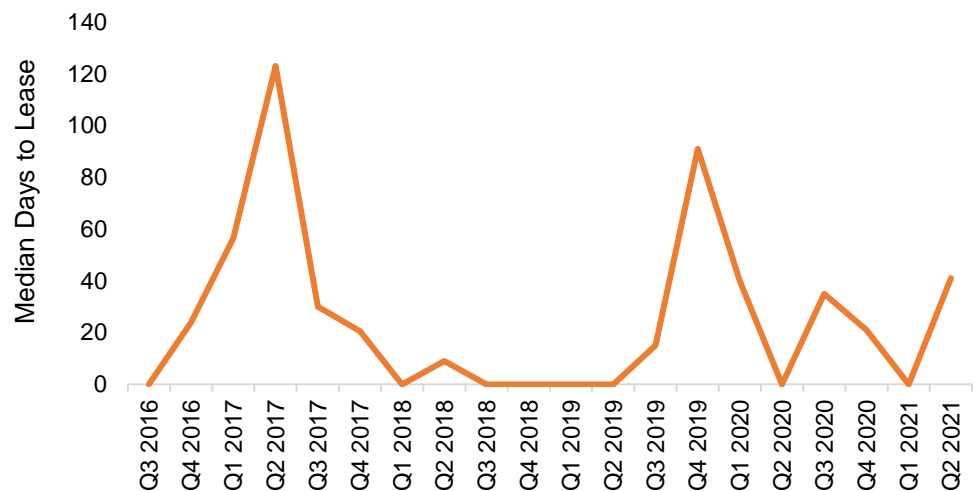
Days to Lease, June Quarter 2021

### Rental Market Trends 2011 - 2021

#### Rent Price and Leasing Volume



#### Median Days to Lease



# Shire of Plantagenet

## Residential Overview



### Residential Market

The Shire of Plantagenet is located 360km from Perth and accommodates 5 townsites within its borders. Located 50km from Albany and within the Shire of Plantagenet is Mount Barker which plays an integral role in servicing the surrounding agricultural areas in the Great Southern region.

The Shire of Plantagenet recorded 1854 dwellings in the 2016 Census. Owner-occupiers dominate the dwelling tenure type in the Shire of Plantagenet at 75% of total dwellings. The rental almost takes up the entirety of the remaining proportion of the residential market at 24%.

Plantagenet's residential market is at a ten year peak, with its most house and vacant land transactions recorded in H1 2021. In total there were 41 house sales recorded, growing by 37% from H2 2020. Vacant land sales almost doubled from H2 2020 in H1 2021, with 19 sales growing from 10 the half year prior.

The rental market in the Shire of Plantagenet is diverse. Worker housing has a rental market share of 10% and the State Housing Authority leases out 11% of the market also. There was limited rental activity in H1 2021 given low levels of available stock.

### Population and Demographics

The Shire of Plantagenet has a total estimated resident population of 5,276. Between 2014 and 2016, the Shire endured negative population growth however from 2017 onwards, Plantagenet has experienced low rate of population growth.

Following a peak in unemployment during 2016 and 2017 at 7%, unemployment rates have fallen to 3.8% (March Quarter 2021), lower than the regional WA and state rates.

Plantagenet has lower median weekly household income in comparison to other local governments in the Great Southern at \$1,035.

# Shire of Plantagenet

## Residential Overview

### Key Statistics

**\$264,000**

Median House Price,  
H1 2021

**+55%**

1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

**\$24,000**

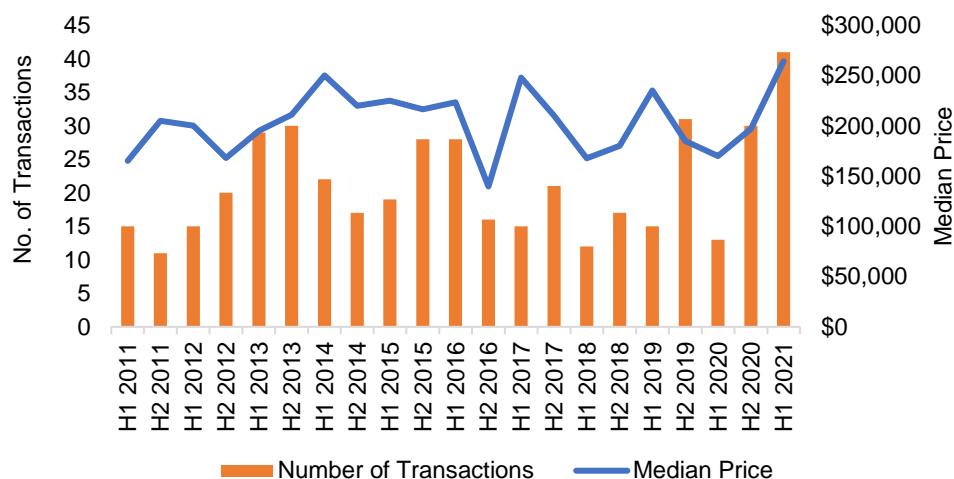
Median Vacant Land  
Price, H1 2021

**+20%**

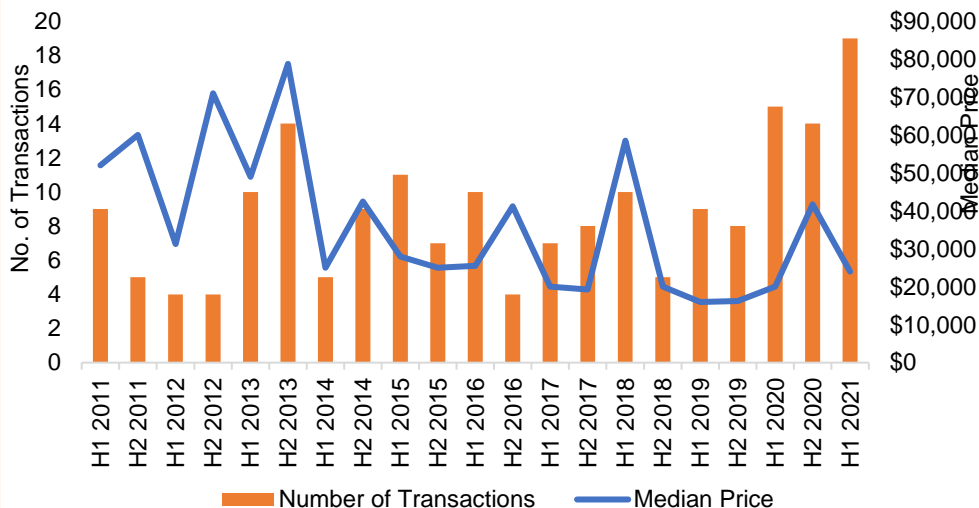
1 Year Median Vacant  
Land Price Growth  
Rate, H1 2020 – H1  
2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



### Residential Market Summary, January – June 2021

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	\$160,000	\$173,000	\$290,000	\$330,000	-	\$264,000
Number of House Sales (12 months)	1	16	15	9	-	41

Sales Summary	House	Vacant Land	Price Growth	House	Vacant Land
Median Price	\$264,000	\$24,000	1 Year	52.8%	20.0%
10-Year Average	\$205,000	\$26,478	3 Year	64.2%	-59.0%
Variation from Avg.	28.8%	-9.4%	5 Year	21.1%	-5.9%
Number of Transactions (6 months)	41	19	10 Year	71.5%	-53.8%



# Shire of Plantagenet

## Residential Overview

### Key Statistics

2

Dwellings Leased, H1  
2021

\$168

Weekly Unit Rent, H1  
2021

28

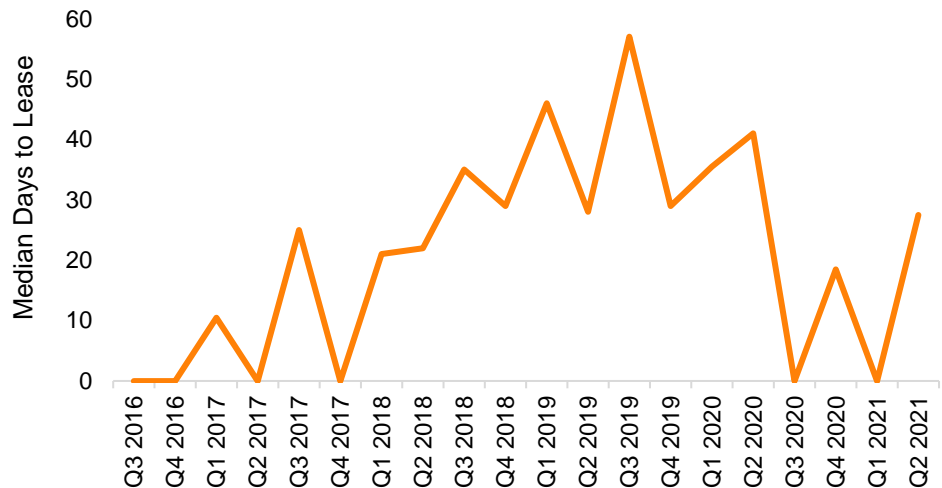
Days to Lease, June  
Quarter 2021

### Rental Market Trends 2011 - 2021

#### Rent Price and Leasing Volume



#### Median Days to Lease



# Shire of Broomehill-Tambellup

## Residential Overview



### Residential Market

The Shire of Broomehill-Tambellup is mostly rural with the two small towns of Broomehill and Tambellup central to the area. One of the smallest residential markets in the Great Southern, the Shire of Broomehill-Tambellup had approximately 360 dwellings recorded by the 2016 Census. Of the dwellings in the Shire, 71% of tenure types were occupied by the owner. Nearly 50% of these dwellings are owned outright. Nearly 19% of the dwellings in the market are rented.

In the last ten years, Broomehill-Tambellup has only averaged three housing transactions bi-annually. The shire experienced six sales in H2 2020, its joint highest number of sales in the last ten years for a half however this fell to only one sale in H1 2021. Vacant land sales have been sporadic with only eight recorded in the last ten years.

In the rental market, there is hardly a formal market presence with only 4% of buildings being leased this way. Worker housing and State Housing Authority dwellings make up almost 50% of the rental market while the informal rental market also accommodates a large portion of the market at 40%.

### Population and Demographics

The estimated resident population of the Shire of Broomehill-Tambellup for 2020 is 1,088 people. There has been negative population growth in the Shire since the last census, with the total population falling by 6.5%.

Currently, the Shire has an unemployment rate of 2.6%. Farming was the dominant industry of employment in the Shire with different types of farming and grain growing collectively making up over 40% of employment by industry in the Shire of Broomehill-Tambellup. The median weekly household income in Broomehill Tambellup is \$1,242.

# Shire of Broomehill-Tambellup

## Residential Overview

### Key Statistics

**\$139,000**

House Price, H1 2021

**-14%**

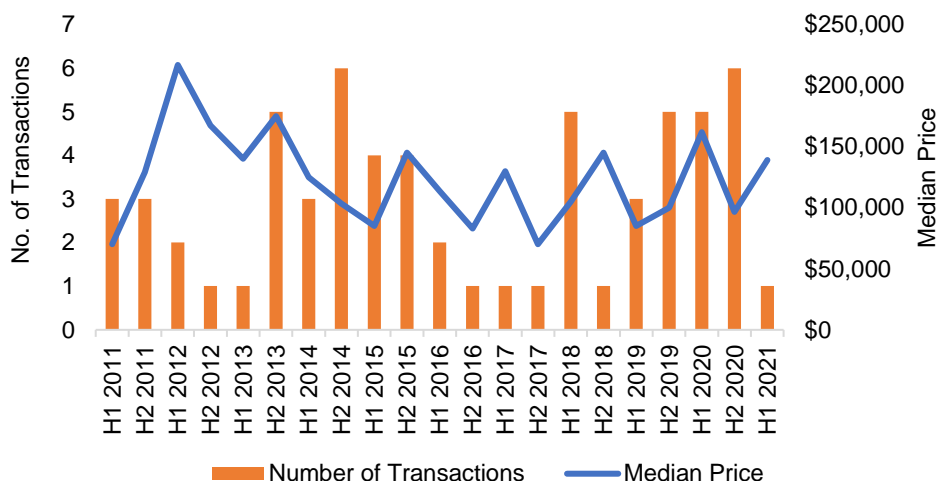
1 Year House Price  
Growth Rate, H1 2020  
– H1 2021

**\$15,000**

Vacant Land Price,  
H1 2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



### Residential Market Summary, January – June 2021

Sales Summary	House	Vacant Land
Price	\$139,000	\$15,000
10-Year Average	\$126,500	\$18,000
Variation from Avg.	9.9%	-16.7%
Number of Transactions (6 months)	1	1



# Shire of Cranbrook

## Residential Overview



### Residential Market

The Shire of Cranbrook has a small residential market, with only 375 dwellings recorded in the area during the 2016 Census. Of these dwellings, 49% were owned outright by the occupier and 20% were owned with a mortgage.

Cranbrook's residential market experiences very limited activity. On average, there are six house transactions recorded each year. Vacant land sales have been limited also, with only seven sales recorded in the last ten years.

The rental market in the Shire of Cranbrook is dominated by the informal housing market which leases out a total of 54% of rented dwellings in the area. Worker housing also leases a large portion of the rental market at 32%.

### Population and Demographics

Cranbrook is one of the smaller Shires in the Great Southern Region with an estimated resident population of 1,107 residents. The ABS reported that in the March quarter of 2021, the Shire of Cranbrook had a very low unemployment rate of 2.6%. The 2016 census detailed that nearly 45% of workers are managers as a result of farming being the Shire's largest sector.

Median weekly household income In Cranbrook is approximately \$1,047 which is significantly less than the WA median of \$1,595. This can once again be attributed to farming being the largest employment sector in the Shire.

# Shire of Cranbrook

## Residential Overview

### Key Statistics

**\$145,000**

Median House Price,  
H1 2021

**-17%**

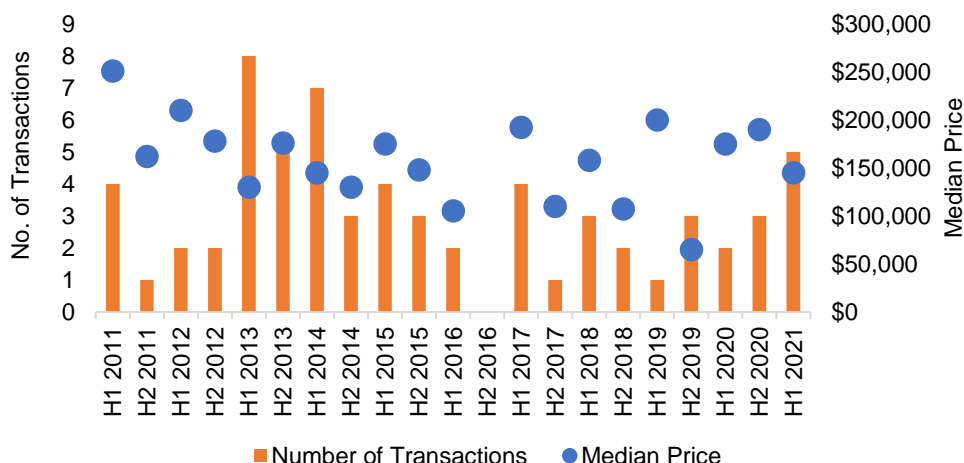
1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

**\$30,000**

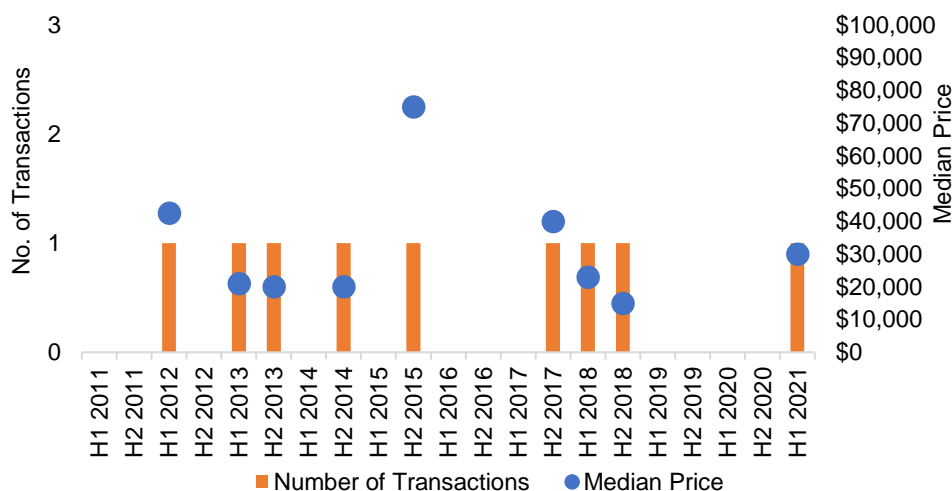
Median Vacant Land  
Price, H1 2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



### Vacant Land Price and Transaction Volume



### Residential Market Summary, January – June 2021

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	-	\$82,500	\$165,000	-	-	\$145,000
Number of House Sales (12 months)	-	2	3	-	-	5



# Shire of Gnowangerup

## Residential Overview



### Residential Market

Located in the Shire of Gnowangerup are the small town sites of Gnowangerup, Ongerup and Borden which help accommodate visitation to major natural attractions such as the Stirling Ranges and Bluff Knoll.

The residential market in the Shire of Gnowangerup is small with 427 dwellings recorded in the 2016 Census. It is dominated by owner occupiers which make up over 63% of the tenure type in the area. Rented dwellings and dwellings occupied rent free also accommodate a combined total of 34% of the tenure type in the area.

The housing market in Gnowangerup is at a peak currently recording its most sales for a half since H2 2012, with ten sales recorded in H1 2021. Furthermore, Gnowangerup had two pieces of vacant land sell in H1 2021, the first vacant land sales since 2019.

No dwellings have been leased in the last five years in Gnowangerup according to REIWA. Informal rental landlords dominate the rental market in Gnowangerup, leasing out over 44% of the rental market on the Shire. Worker housing in the area provided totals over 24% of the rental market in the Shire. The State Housing Authority also have prevalence in the area providing 15% of dwellings in the rental market.

### Population and Demographics

A smaller shire in the Great Southern region, Gnowangerup has an estimated resident population of 1,200. Over the last five years, the population in the shire has fallen by 3%.

The Shire of Gnowangerup has the one of the lowest unemployment rates in the Great Southern region at 2.2%.

Gnowangerup has one of the highest median weekly household incomes in the Great Southern at \$1,314.



# Shire of Gnowangerup

## Residential Overview

### Key Statistics

**\$119,000**

Median House Price,  
H1 2021

**+49%**

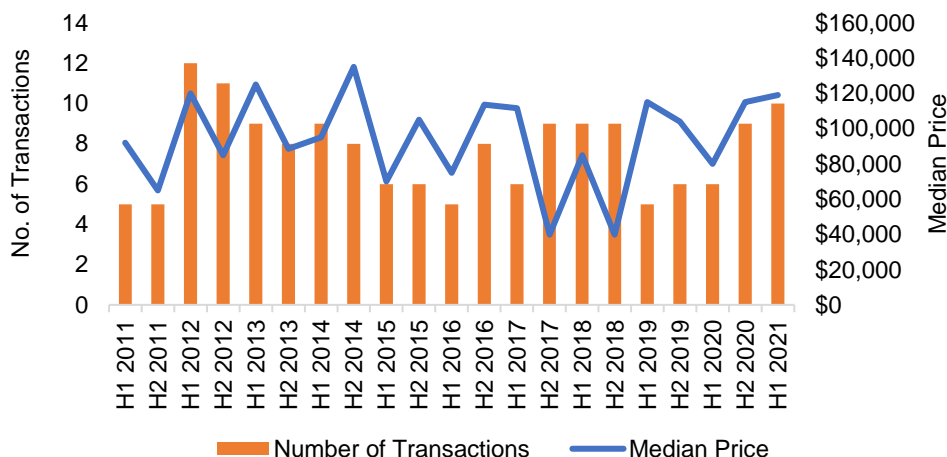
1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

**\$13,000**

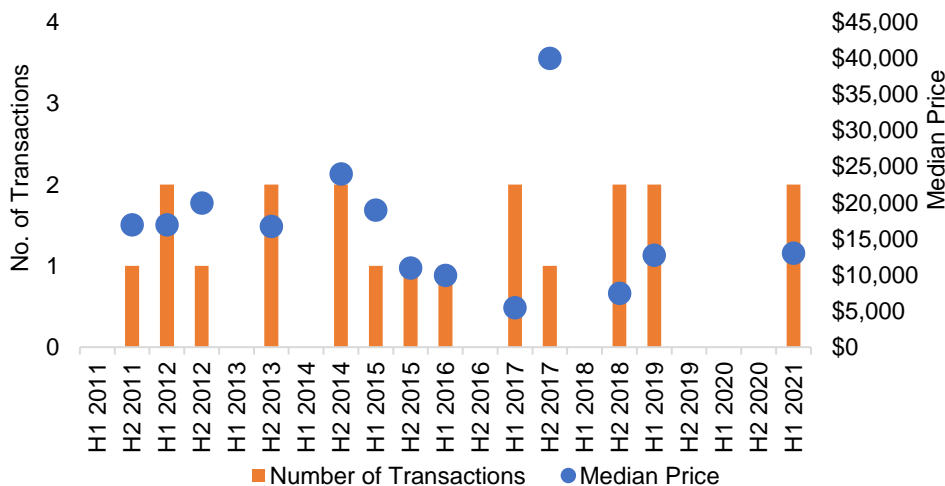
Vacant Land Price, H1  
2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



### Residential Market Summary, January – June 2021

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	-	\$102,000	\$122,000	\$52,000	\$425,000	\$119,000
Number of House Sales (12 months)	-	2	6	1	1	10

Sales Summary	House	Price Growth	House
Median Price	\$119,000	1 Year	48.8%
10-Year Average	\$100,000	3 Year	40.0%
Variation from Avg.	19.0%	5 Year	19.0%
Number of Transactions (6 months)	10	10 Year	29.3%

# Shire of Katanning

## Residential Overview



### Residential Market

The Shire of Katanning is located in the heart of the Great Southern region with the townsite acting as a regional centre for services and facilities for neighbouring shires. The Shire of Katanning had a total of 1360 dwellings recorded in the 2016 Census. Over 63% of these dwellings were owner-occupied and 33% of dwellings were rented.

Housing transactions in Katanning are currently at a peak with 34 sales recorded in H2 2020 and 32 recorded in H1 2021. Unit sales occur infrequently however two sales were recorded in H1 2021 for the first time since 2017. Vacant land sales are relatively low with approximately two sales recorded on average bi-annually in the last ten years.

The State Housing Authority also has a strong presence in the Shire of Katanning, providing 20% of the rented dwellings in the area.

### Population and Demographics

The ABS estimated that in 2020, the Shire of Katanning had an estimated resident population of 4,046 people (down from 4,200 in 2016).

The unemployment rate in the Shire of Katanning for the March quarter of 2021 was 4.6% which was its lowest recorded in the last ten years.

The Shire of Katanning's median weekly household income as at the ABS 2016 Census was \$1,205.

# Shire of Katanning

## Residential Overview

### Key Statistics

**\$210,000**

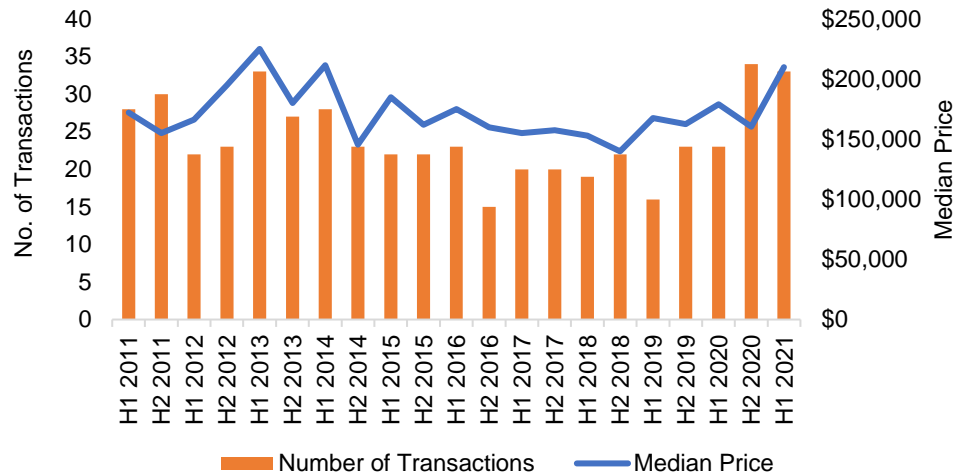
Median House Price,  
H1 2021

**+17%**

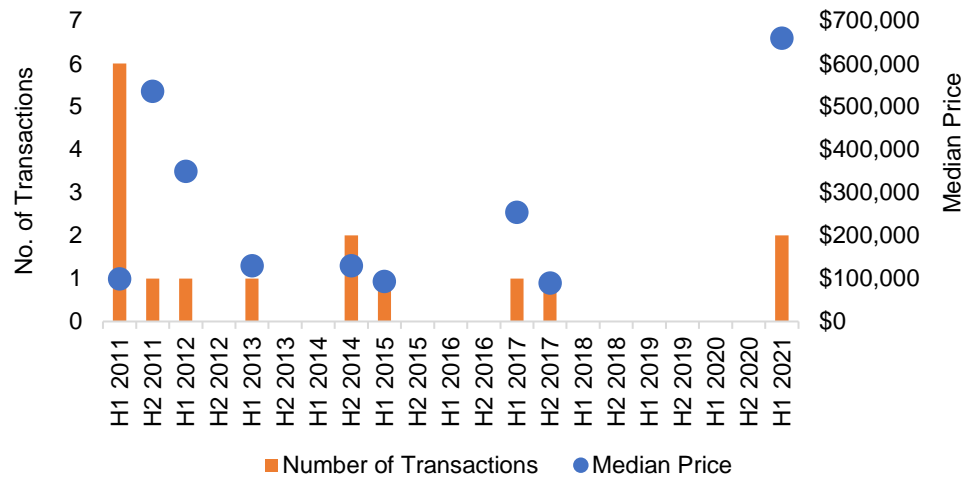
1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

### Residential Market Trends 2011 - 2021

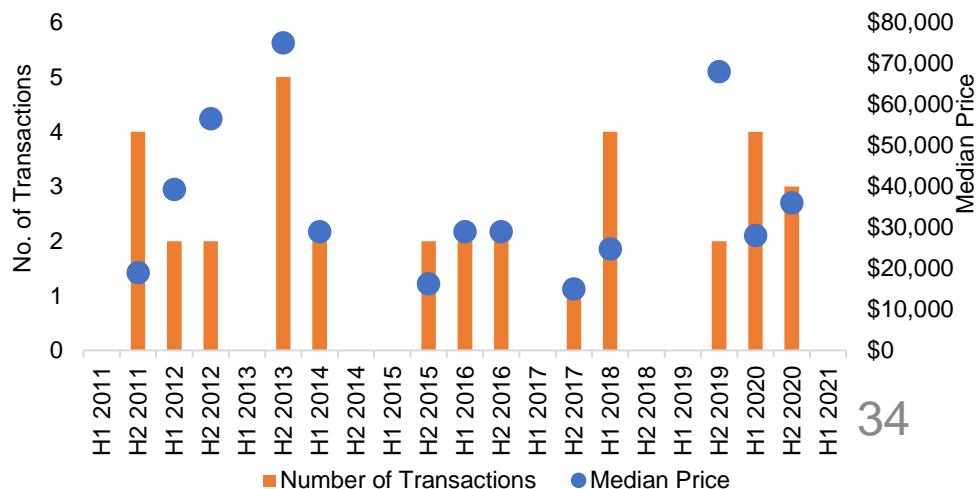
#### House Price and Transaction Volume



### Unit Price and Transaction Volume



### Vacant Land Price and Transaction Volume





# Shire of Kent

## Residential Overview



### Residential Market

Primarily a rural area, the Shire of Kent has two small townsites of Nyabing and Pingrup. A small resident population in the Shire of Kent translates to one of the smallest residential markets in the Great Southern region. There were 190 dwellings recorded in the Shire of Kent in the 2016 Census of which 69% were owner-occupied.

The Shire of Kent has experienced very limited sales and rental activity in the last ten years. In H1 2021, there was one house transaction and one dwelling leased on the formal rental market.

Worker housing provides 40% of rented dwellings to the rental market. Informal rental landlords also provide dwellings to 31% of the market. There is very minimal formal or State Housing Authority activity in the rental market in the Shire of Kent.

### Population and Demographics

The Shire of Kent is the smallest shire in the Great Southern Region with an estimated resident population of 559 people. It has experienced moderate negative population growth of -1.5% in the last five years.

The Shire of Kent has a low unemployment rate of 2.2% with 75% of jobs coming from the agricultural sector.

The ABS 2016 Census recorded that the Shire of Kent had the highest median weekly household income in the Great Southern at \$1,342.

# Shire of Kent Residential Overview

## Key Statistics

**\$50,000**

House Price, H1 2021

**1**

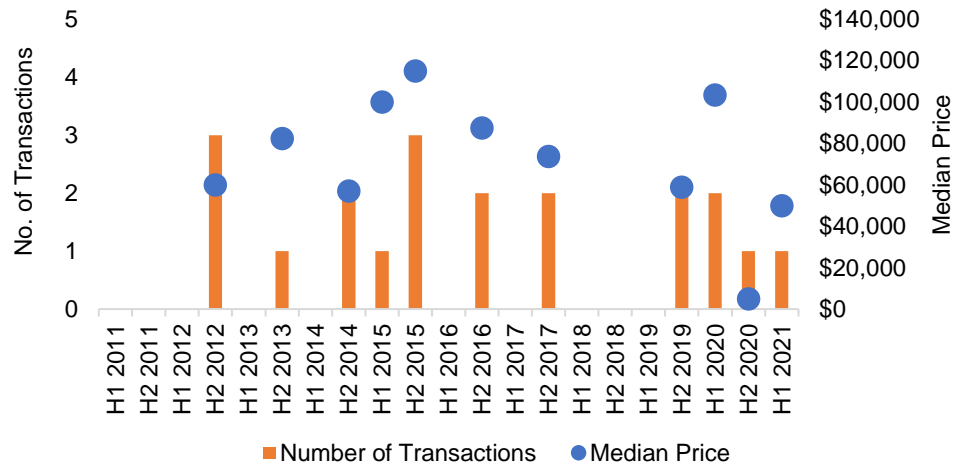
Dwellings leased, H1  
2021

**\$250**

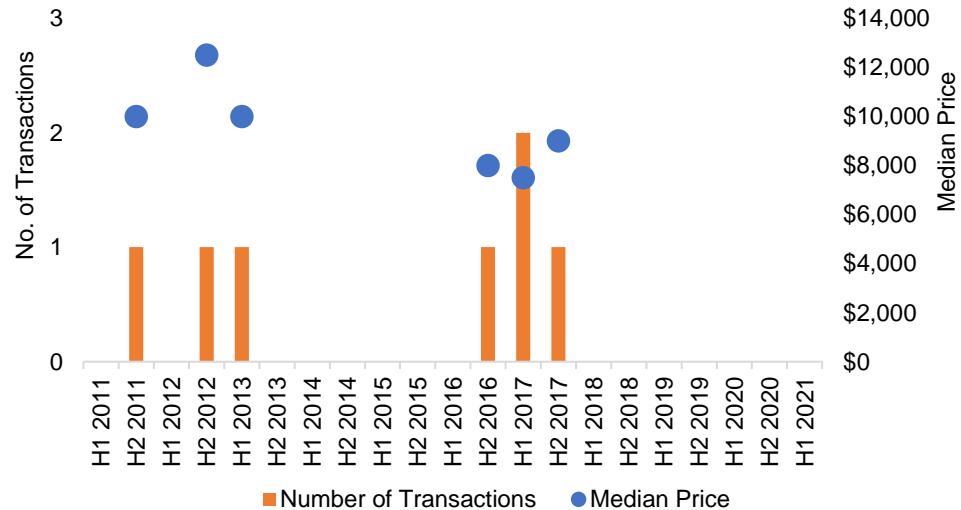
Weekly Unit Rent, H1  
2021

## Residential Market Trends 2011 - 2021

### House Price and Transaction Volume

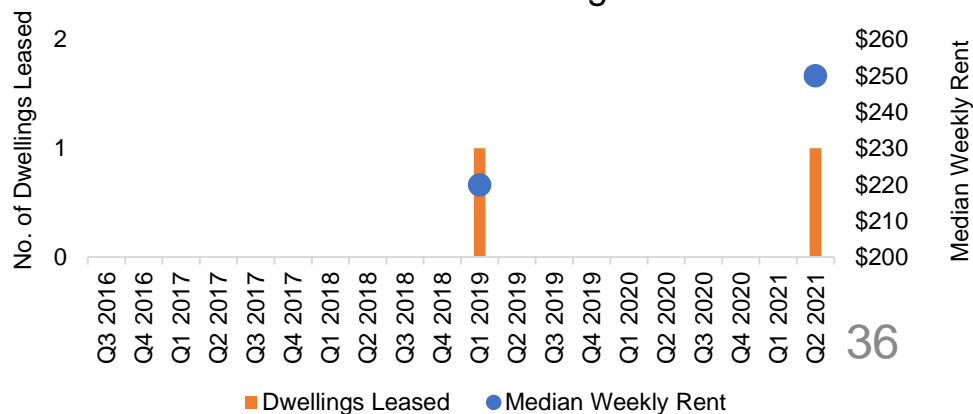


### Vacant Land Price and Transaction Volume



## Rental Market Trends 2011 - 2021

### Rent Price and Leasing Volume



36



# Shire of Kojonup

## Residential Overview



### Residential Market

Located 260km south of Perth, the Shire of Kojonup has a thriving townsite and rural properties. The Shire recorded 726 dwellings in the 2016 Census, of which 67% of the dwellings are owner-occupied.

Kojonup recorded its most housing transactions in three years with 11 sales. Vacant land sales have been limited with 15 sales recorded in the last ten years.

Kojonup has limited rental stock available through the formal advertised market. The State Housing Authority have a share of 15%, the informal market represents 49% and worker housing (including government) accounts for a significant 22% in the Shire of Kojonup.

### Population and Demographics

The Shire of Kojonup had an estimated resident population of 1,912 in 2020 (down by 4.9% since 2016).

Over the last three years, the unemployment rate in the Shire has fluctuated between 2-3%. The March quarter of 2021 recorded an unemployment rate of 2.6%.

The Shire of Kojonup had one of the highest median weekly household incomes recorded in the ABS 2016 Census in comparison to other local governments at \$1,303.



# Shire of Kojonup

## Residential Overview

### Key Statistics

**\$180,000**

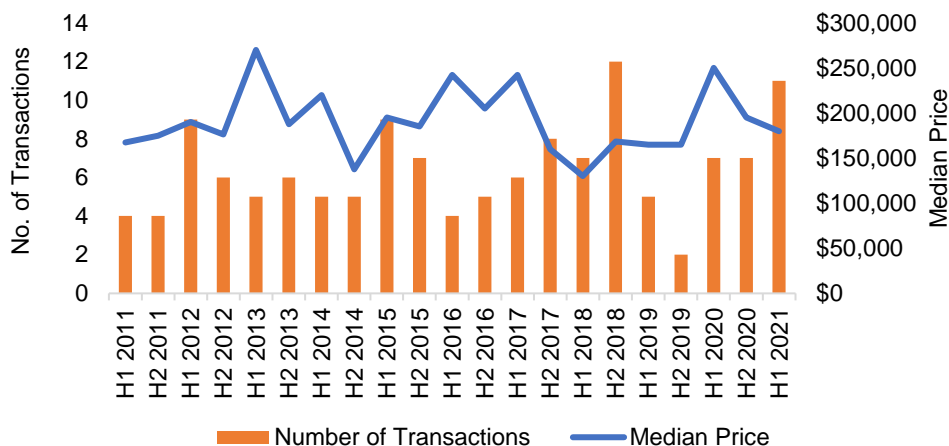
Median House Price,  
H1 2021

**-28%**

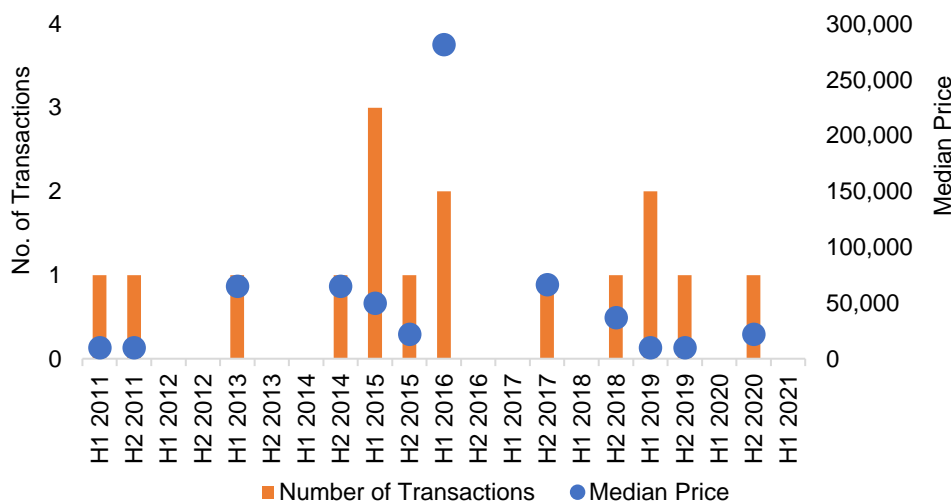
1 Year Median House  
Price Growth Rate,  
H1 2020 – H1 2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



#### Vacant Land Price and Transaction Volume



### Residential Market Summary, January – June 2021

Price by Bedroom	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	Overall
Median House Price	-	\$195,000	\$188,750	\$130,000	-	\$180,000
Number of House Sales (12 months)	-	4	6	1	-	11

Sales Summary	House	Price Growth	House
Median Price	\$180,000	1 Year	-31.3%
10-Year Average	\$192,500	3 Year	51.9%
Variation from Avg.	-6.5%	5 Year	-18.6%
Number of Transactions (6 months)	11	10 Year	-14.1%

# Shire of Woodanilling

## Residential Overview



### Residential Market

Woodanilling has the smallest residential market in the Great Southern region with only 153 dwellings recorded in the 2016 Census. Of the total dwellings in the area, 45% of occupiers own the dwelling outright and 27% own the dwelling with a mortgage. Rented dwellings and dwellings occupied rent free were the only other tenure types recorded in the Shire of Woodanilling in the 2016 Census at 12% and 9% respectively.

There has been very limited activity in Woodanilling with only 20 house transactions since 2011, with many reporting periods recording no transactions in Woodanilling. No residential vacant land sales have been recorded since 2011.

A small rental market, there is no formal market presence in the Shire of Woodanilling. The informal rental market makes up over 63% of the dwellings rented and being occupied rent free.

### Population and Demographics

The Shire of Woodanilling is the smallest Shire in the Great Southern region in terms of size and population with an estimated resident population of 430 people. This has grown by 3.6% from 2016 where 415 people inhabited the Shire.

Historically the unemployment rate in Woodanilling has been high, ranging between 7-9.5%. Unemployment in the Shire of Woodanilling for the March quarter of 2021 was 4.6%, the lowest it has been in the last five years.

The median weekly household income was \$1,228 for the Shire of Woodanilling in the ABS 2016 Census.

# Shire of Woodanilling

## Residential Overview

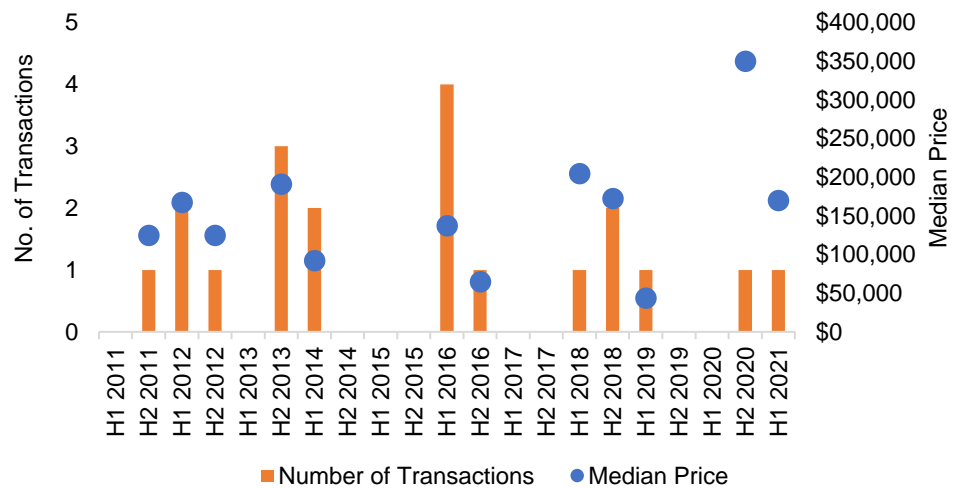
### Key Statistics

**\$170,000**

House Price, H1 2021

### Residential Market Trends 2011 - 2021

#### House Price and Transaction Volume



#### Vacant Land Price and Transaction Volume





# | Public Housing Overview



There is a total of 1,107 public housing dwellings located in the Great Southern. Of these dwellings there is a total of 958 occupied with a further 97 dwellings in other use. Currently there are 39 dwellings that are void.

Approximately 69% of total public housing stock is located in Albany. The Shire of Katanning also has a large share of the public housing stock in the Great Southern, with 13% of dwellings being located in the LGA. Woodanilling is the only LGA in the Great Southern which does not have any public housing stock.

There is a public housing shortage across the Great Southern. Currently there is 589 wait turn applications for the Great Southern with 119 of these applications having priority. Over 76% of these applications are for housing in Albany with a further 12% for public housing in Katanning. This public housing shortage is a prominent across all of regional WA.

As at September 2021, there are no wait turn applications for the Shires of Cranbrook, Jerramungup, Kent and Woodanilling.

# Great Southern Public Housing Overview

## Public Housing Stock as at September 2021, Great Southern

LGA	Occupied	Voids*	Other Use	Total
City Of Albany	645	26	97	768
Shire Of Broomehill-Tambellup	18	2	-	20
Shire Of Cranbrook	6	1	-	7
Shire Of Denmark	75	-	7	82
Shire Of Gnowangerup	14	1	-	15
Shire Of Jerramungup	6	-	-	6
Shire Of Katanning	134	5	-	139
Shire Of Kent	2	-	-	2
Shire Of Kojonup	24	1	1	26
Shire Of Plantagenet	34	3	5	42
<b>Region Total</b>	<b>958</b>	<b>39</b>	<b>110</b>	<b>1,107</b>

\* NB: Data does not include 'Sub Management Type' Community Housing and GROH (Government Regional Officer's Housing).

\*\* NB: Voids includes Returning and Not-Returning Void

\*\*\* NB: 'Other Use' Current Property Status include externally managed properties, externally managed tenancies, leasing residential properties, asset transfers and split tenancies.

\*\*\*\* NB: Data sourced from Habitat (Tenancy Management System).

\*\*\*\*\* NB: PH Stock can be broken down by Region, Area Office or LGA, but cannot be broken down by Suburb or Preference Zone.

\*\*\*\*\* NB: LGA = Local Government Area.

\*\*\*\*\* NB: Any LGAs situated in the Great Southern Region which DO NOT appear in the above table have no Public Housing stock as at 30 September 2021.

## Public Housing Wait List as at September 2021 , Great Southern

Preference Zone	Wait Turn	Priority
Albany	446	119
Broomehill	1	-
Denmark	41	6
Gnowangerup	3	-
Katanning	73	11
Kojonup	4	1
Mt Barker	20	8
Tambellup	1	1
<b>Region Total</b>	<b>589</b>	<b>146</b>

\* NB: The number of Wait Turn Applications includes Priority Applications. Therefore, of the 589 total Wait Turn Applications, 146 are priority in nature.

\*\* NB: The Wait List can be broken down by Preference Region and Preference Zone, not by suburb.

\*\*\* NB: Data sourced from Habitat (Tenancy Management System).

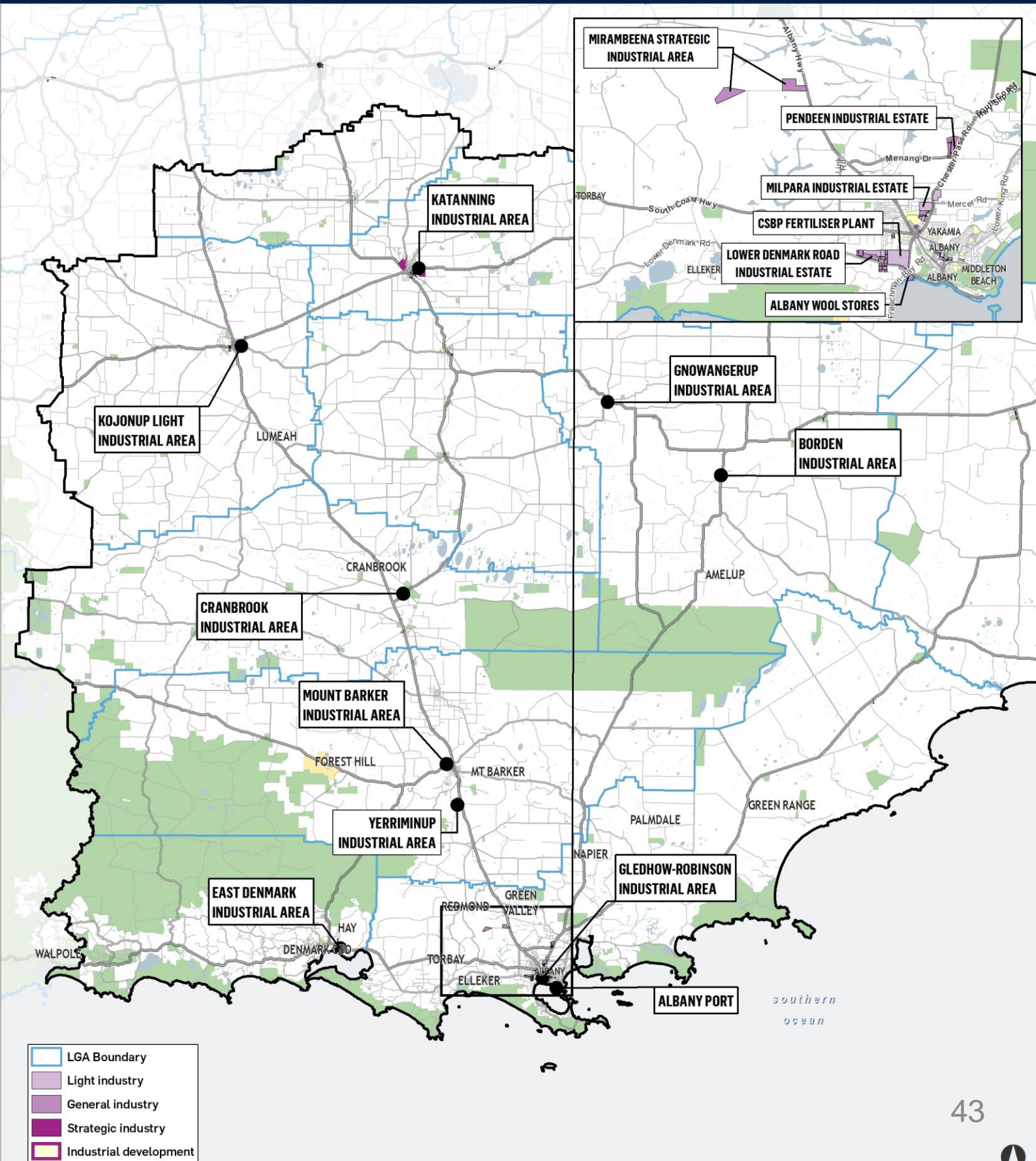
\*\*\*\* NB: The following boundary changes came into effect on 1 April 2020 - applications with Preference Zones:

1). Newdegate, Lake Grace, Lake King, Varley, Kukerin, Dumbleyung were previously managed by '4 Great Southern' Region and are now managed by the 'B Wheatbelt Region'."

\*\*\*\*\* NB: Any Preference Zones situated in the Great Southern Preference Region which DO NOT appear in the above table have no Wait List applicants as at 30 September 2021.



# Industrial Land Overview





# | Industrial Land Overview



The region is characterised by the following key estates.

- **Albany Port Industrial Zone:** Albany Port still services trade of bulk products such as grain. There is approximately 100 ha of industrial zoned land, with 10 ha undeveloped.
- **Mount Barker Industrial Area:** The Mount Barker Industrial Area is comprised of 70 ha of industrial zoned land near Mount Barker. Most of the land in the industrial area is undeveloped however current businesses in the area include Holcim (ready mix concrete), hardware stores and Mount Barker Transport.
- **Lower Denmark Road Industrial Estate:** The Lower Denmark Road Industrial Estate comprises of 260 ha of general and industrial zoned land in close proximity to the Albany CBD. Current businesses in the area include food wholesalers, automotive services, transport and logistics and equipment hire.
- **Pendeen Industrial Estate:** Pendeen Industrial Estate is an industrial area located in Willyung, northeast of Albany, that is predominantly comprised of Transport and Logistic services. There are approximately 80 ha of industrial zoned land in the area with 40 ha remaining undeveloped currently, leaving considerable capacity for development.
- **Mirambeena Strategic Industrial Area / Down Road Timber Processing Precinct:** The Mirambeena Strategic Industrial Area (SIA) and Down Road Timber Processing Precinct cater for strategic and heavy industry associated with the downstream processing of local resources such as timber, agricultural produce and fisheries. Approximately 160 ha in size, there is a large amount of industrial land remaining to be developed however proximity to the Marbellup Creek Water reserve may limit the extent of development.

# | Industrial Land Overview

- **Milpara Industrial Estate Spotlight:** The Milpara Industrial Estate is comprised of 160 ha of industrial zoned land in the suburb of Milpara northwest of Albany. There are plans for an additional 24 ha of land to be developed east of the estate. Businesses within the area are primarily manufacturers, warehousing, service industries and wholesalers.
- **Kojonup Industrial Area:** Kojonup's industrial area is located in the south western part of the township. This industrial area has a range of different services available however has a strong agricultural presence with CBH group having a large scale branch in the area.
- **Gnowangerup Industrial Area:** Gnowangerup has a small industrial in the towns south which provides typically mechanical and transport services. The industrial area is primarily undeveloped.
- **Borden Industrial Area:** Located in the Shire of Gnowangerup, is the town of Borden. Located in Borden is one of CBH's many large scale grain terminals. The terminal at Borden services Albany and has the capacity to store up to 345,000 tons of grain.
- **Proposed Yerriminup Agribusiness Precinct:** The Yerriminup Industrial Area is a composite 193 ha undeveloped industrial landholding located 5km south of Mount Barker and 40km north of Albany. The State Government identified that the Yerriminup Precinct could help service agricultural practices in the Great Southern region.
- **Katanning Industrial Area:** Katanning's industrial area is located to the south of the township and is host to a range of different services such as agricultural and mechanical. Katanning is renowned for its livestock farming industry and has an abattoir and the Southern Hemisphere's largest undercover sheep sales yard however these are located out of the industrial area.
- **Cranbrook Industrial Area:** The Cranbrook Industrial Area is located in the southern part of the town of Cranbrook. It is primarily comprised of storage and distribution services which service the Albany and Great Southern Highway's located within the town's vicinity.

Industrial Area Floorspace and Undeveloped Land	Albany Port Industrial Zone	Mount Barker Industrial Area	Lower Denmark Road Industrial Estate	Milpara Industrial Estate	Pendeen Industrial Estate	Mirambeena Strategic Industrial Area / Down Road Timber Processing Precinct	Yerriminup Agribusiness Precinct
Approximate Size (ha)	100 ha	70	260	160	80	160	-
Total Floorspace (Net Lettable Area sq.m)	68,870	8,174	41,852	55,000	24, 239	19,870	-
Estimated Undeveloped Land (ha)	~10	~50	~180	~30	~40	~70	~193

# Industrial Land Overview

## Key Statistics

5

Vacant Industrial Market Sales, H1 2021

\$35

Median Price per sq.m, H1 2021

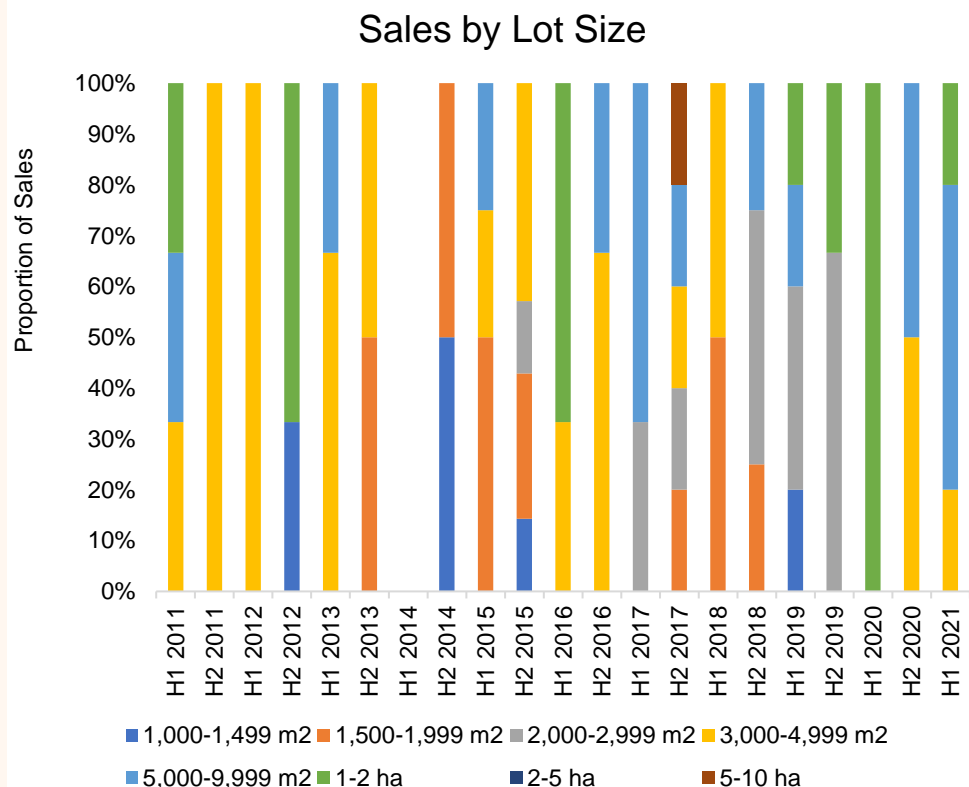
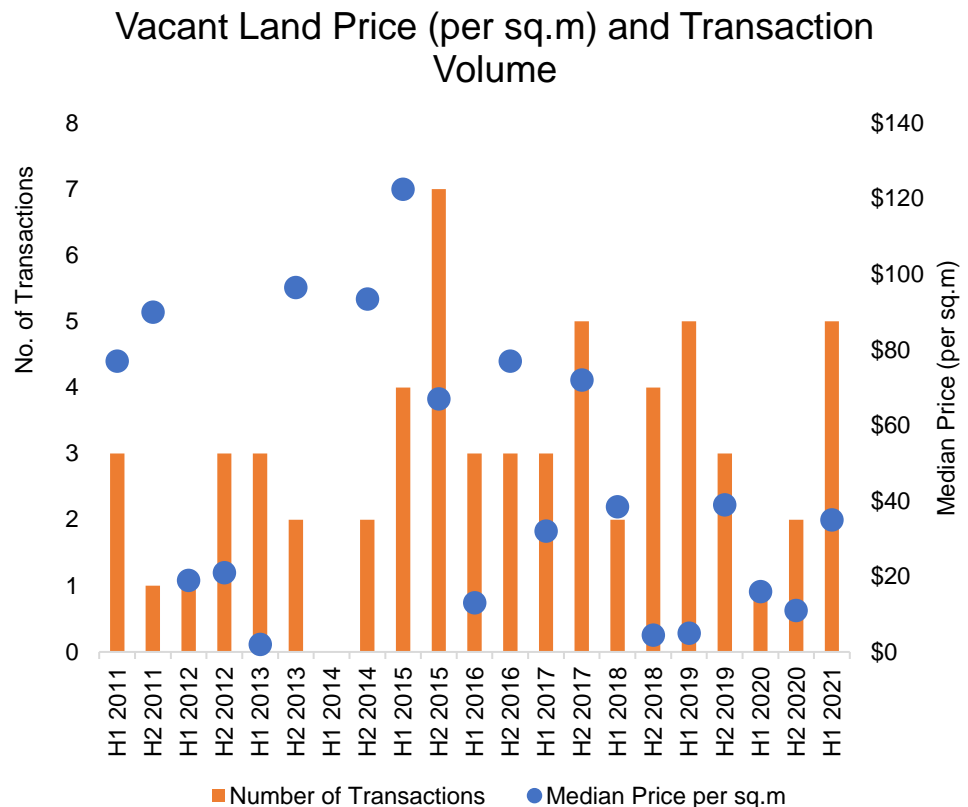
150%

Growth in Sales Transactions, H2 2020 – H1 2021

0.84 ha

Median Lot Size, H1 2021

## Vacant Industrial Market Trends 2011 - 2021





# Industrial Land Overview

## Key Statistics

2

Sales recorded within key Industrial Estates, H1 2021

1

Sale recorded in Milpara Industrial Estate and Pendeen Industrial Estate, H1 2021

1.7

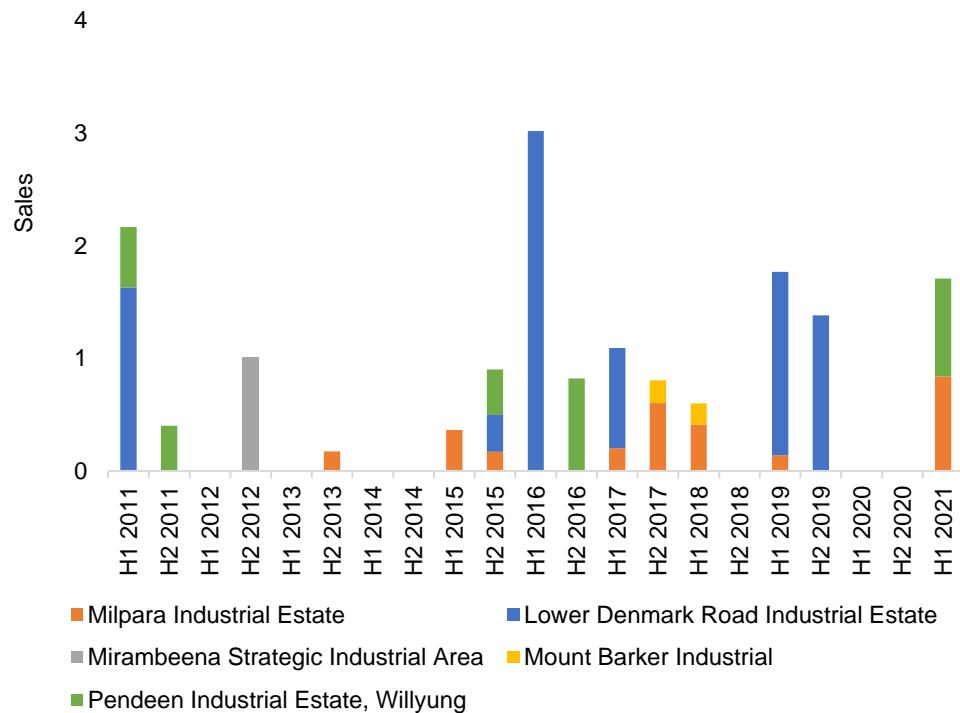
Hectares sold, H1 2021

0.87ha

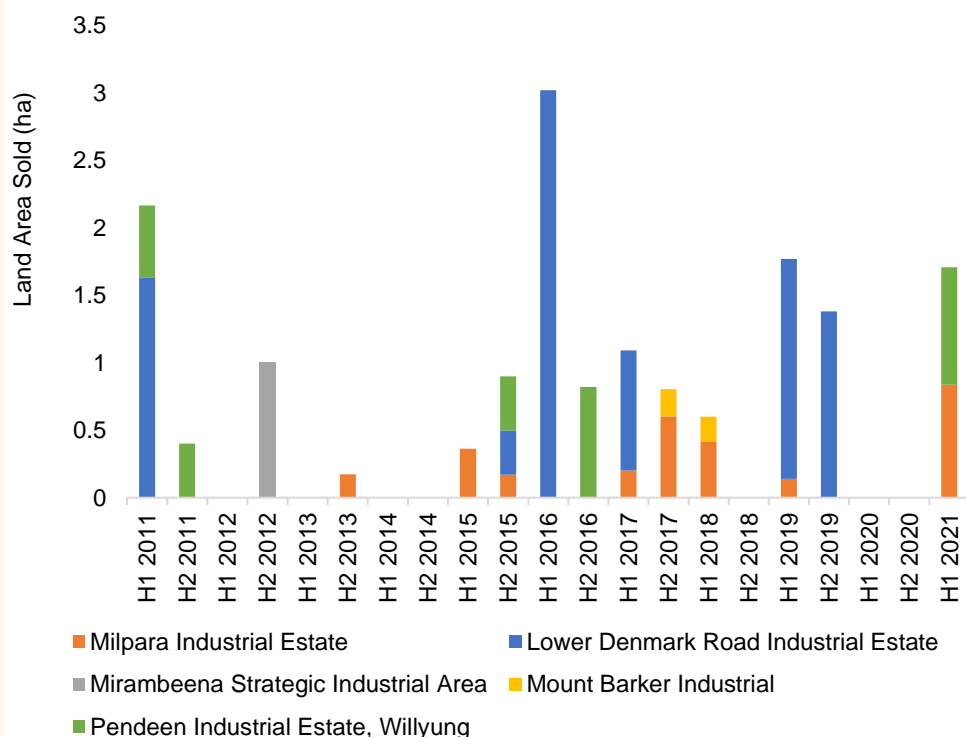
Largest Lot Sold – Pendeen Industrial Estate, H1 2021

## Vacant Industrial Market Trends 2011 - 2021

Sales by Estate



Area Sold by Estate



# Data Sources Used to Inform Summary

The table below lists the key data sources used to inform this report. Other data sources used in the commentary of this report have been referred to in the report text.

Local Government Spotlight	Data was sourced from a combination of sources; 2016 ABS Census, REMPLAN, Economy ID and Profile ID.
Dwelling Sales and Prices, Vacant Land Sales and Prices	<p>Urbis analysis of Landgate data. Sales and price data is based on settled sales data reported to Landgate.</p> <p>While LandGate records all sales, it does not record the number of bedrooms in all sales hence why some sales by bedroom numbers do not match the total.</p> <p>Data is based on all data released by Landgate as at 13/12/2021</p>
Average Days on the Market and Average Discounting	Data was sourced from PriceFinder.
Median Rents and Dwellings Leased	Data was sourced from REIWA, based on the dwellings listed by REIWA.
Tenure and Landlord Type	Data was sourced from the 2016 ABS Census.
Industrial Sales	<p>Urbis analysis of LandGate. Sales and price data is based on settled sales data reported to LandGate.</p> <p>Land sales of greater than 1,000 sq.m and less than 10 ha have been used.</p> <p>Data is based on all data released by LandGate as at 13/12/2021</p>

# Definitions Used to Inform Summary

The table below lists the key definitions and parameters used to inform this report. Other data sources used in the commentary of this report have been referred to in the report text.

Median Price	Is based on the median sale price for sale for the six month period. The data of sale is based on the contract not settlement date. Multi lot sales are excluded.
House Sales	Houses are based on house sales on a site area of less than 1 ha.  Multi lot sales are excluded.
Vacant Land Sales	Properties classified by LandGate as residential. Includes all site sizes.  Multi lot sales are excluded.
Industrial Land Sales	Vacant land sales classified as industrial land by LandGate with a site area of between 1,000 sq. and 10 ha.  Multi lot sales are included as a single sale.
Variation from average	Is the percentage difference between the 6 month median house price and the median price for houses for the 10 years to the end of the six month period.
Formal Rental Market	Dwellings leased through a real estate agent.
Informal Rental Market	Combined total of dwellings leased through ABS Landlord Type Categories 'Persons not in the same household – parent/ other relative' and 'Persons not in the same household – other person.'



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