Gentrification impacts on low-medium density residential infill development: Brisbane

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Abstract

Gentrification has been occurring in many cities across the world since the 1960s. Previous studies have identified gentrified and gentrifying parts of Brisbane based on demographic factors. A concern is that the gentrification of houses in the inner-middle suburbs may reduce the feasibility of future higher density redevelopment, in particular low-medium density residential development.

A Focus Area of inner-middle suburbs of Brisbane is identified. This is based on areas that have experienced a combination of relatively high levels of house improvements, through demolition and replacement of and/or alterations and additions to houses, and have higher median house prices and/or higher price movements over the 2016-2025 period.

The Focus Area has experienced an increased rate of new house development, relative to other dwellings, over the 2016-2025 period when compared to the previous 2001-2016 period. New houses, at about half the dwelling density, appear able to compete favourably with new higher density other dwellings for some sites in low-medium density residential zoned areas. Those house densities are also only about 1.5 times those which have occurred over the same periods in low density residential zoned areas. This suggests that the latter may represent a significant constraint to feasible higher density dwelling yields if future upzonings were to be considered for those areas.

Although most new housing in the Focus Area until now has been other dwellings, the high and relatively increasing rate of new houses, and the apparent improvements to existing houses, warrant further property-level research across a broad area of inner-middle Brisbane. Such research could better inform:

- *the realistic scope for continued development of higher density other dwellings in areas currently zoned for low-medium density residential;*
- *reassessment of overall expected dwelling yields in low-medium density areas; and*
- *the likely feasible dwelling yield from any potential upzonings in areas currently zoned low density residential.*

Introduction

Gentrification, broadly defined as "…the process of affluent or upwardly mobile households moving into lower socioeconomic areas." (p.191), appears to have been experienced in many cities across the world since the 1960s (Pegler et al. 2020). Others have primarily considered the associated demographic changes (e.g. AUO 2025; Nicholas 2023; Pegler et al. 2020). This paper considers the impact of gentrification on the potential for higher density redevelopment, focussing on low-medium density residential redevelopment in the inner-middle suburbs of Brisbane.

The feasibility of higher density redevelopment depends in part on the cost of acquiring sites. Where existing houses are high value, e.g. some combination of larger, higher quality and/or more recently built, extended and/or renovated, relative to the area of land on which they sit, this tends to reduce the feasibility of higher density redevelopment. The value of the land in its existing use, including the effective value of the improvements, may exceed the residual value of the land for redevelopment, based on expected prices of the potential dwellings minus all development costs. So, in such cases prospective developers would not be able to, feasibly, offer enough to acquire the land for redevelopment. (Havard 2014)

Previous research found that, historically, development of small projects of low-rise apartments and townhouses on former house lots has been common across the inner and middle suburbs of Brisbane (Anstey 2024). However, how might the gentrification of houses in the inner-middle suburbs affect the scope for such infill development in the future?

This paper makes progress towards answering this overarching question, by seeking to first answer the following initial questions:

- what did previous research into gentrification in Brisbane find?
- what has been the scale and location of improvements to houses across the Brisbane City Local Government Area (LGA) in recent years?
- what has been the nature of changes across areas with potential for low-medium density redevelopment?
- what are the relative values of houses and other dwellings across the inner-middle suburbs of Brisbane?

Findings of previous research

Previous research, considering primarily demographic indicators of gentrification in Brisbane, Sydney and Melbourne, looked at the extent of change in seven selected variables between 2006 and 2016 (Pegler et al. 2020). It created an index of change based on the quartiles of percentage change for those seven variables, which were: personal income; rent; mortgage repayments; educational attainment; occupation; and population density. Statistical Area Level 2's (SA2s) in the top half of index scores that were located within 15 kilometres (km) of the Central Business District (CBD) were classified as 'gentrifying or at risk of gentrifying'. Key findings for Brisbane were:

- areas with the highest change were located 5-15 km from the CBD, with the Brisbane inner city, gentrified during a previous wave, described as a relatively stable, affluent area;
- those SA2s identified by the research as 'gentrifying or at risk of gentrifying', as interpreted from the published mapping, include: Annerley, Cannon Hill, Carina, Carina Heights, Chermside, Corinda, Enoggera, Fairfield-Dutton Park, Mitchelton, Moorooka, Murarrie, Northgate-Virginia, Nundah, Salisbury-Nathan, Stafford, Wavell Heights and Woolloongabba. (Pegler et al. 2020)

More recently, the Australian Urban Observatory (AUO) at RMIT University has created the Precarity Index for Neighbourhoods and City Housing (PINCH). The PINCH measures gentrification in Australia's cities based largely on Australian Bureau of Statistics (ABS) Census data changes between 2016 and 2021. The eight PINCH categories include (from least to most 'gentrified'): Low income/susceptible to displacement; Ongoing displacement of low-income households; At risk of gentrification; Early ongoing gentrification; Stable

moderate/mixed income; At risk of becoming exclusive; Becoming exclusive; Stable/advanced exclusive. (Nicholas 2023; AUO 2025)

The PINCH index identified most of inner-middle Brisbane as ‘Stable/advanced exclusive’, with much of the rest of the Brisbane City LGA identified as ‘At risk of becoming exclusive’ (Nicholas 2023).

These findings suggest that much of the Brisbane City LGA is either already gentrified and exclusive or is gentrifying and at risk of becoming exclusive. So how have these circumstances, based primarily on demographic analysis, been reflected in improvements to houses in Brisbane?

Improvements to houses in recent years

Observation of Brisbane’s inner-middle suburbs over time suggests the size, quality and value of houses has been improved through:

- demolishing pre-existing, lower value, older houses and replacing them with one or more new, generally much larger houses with modern amenities, with the number of new houses depending on the scope/intent for subdivision of the existing property; and/or
- alterations, additions and renovations to increase the size and improve the amenities of existing houses.

In considering supporting data for this, small area estimates of dwelling stock by the ABS over the July 2016 to June 2022 period had the useful by-product of estimates of both the demolition/removal of houses and the added houses.[1] Figure 1 shows those SA2s within the Brisbane City LGA that satisfy all of the following criteria:

- houses demolished or removed over the 2016-2022 period were at least 2.5 per cent of the stock of houses in 2022;
- new houses added during the 2016-2022 period are equal to or greater than the houses demolished or removed, at least in part reflecting replacement dwellings; and
- the relevant SA2s had a stock of at least 1000 houses in 2022. (ABS 2021, 2024)

[1] It is unfortunate that this time series has not been continued by the ABS after the initial estimates were produced in 2022.

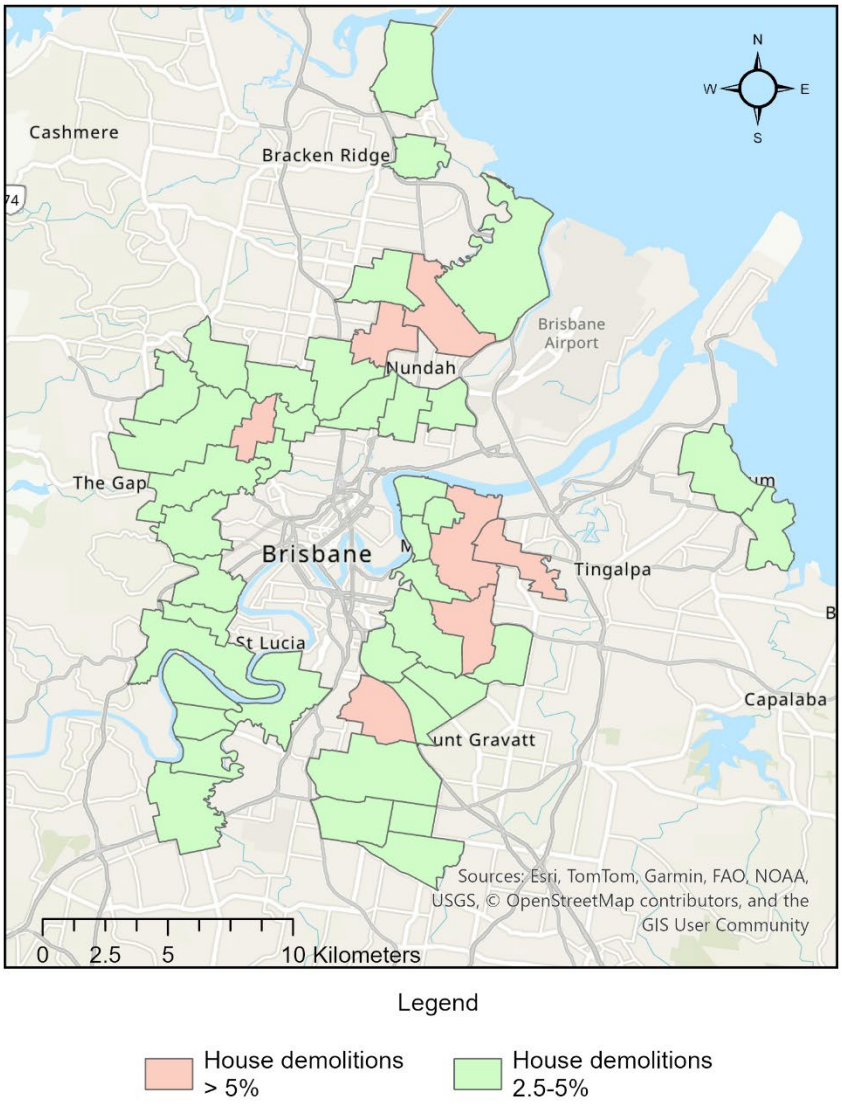

Figure 1: Brisbane City SA2s with higher rates of houses demolished/ removed and replaced, 2016-2022

All of the identified SA2s are either middle or bayside suburbs. Inner suburbs may not be captured because they either have too few houses or are substantially affected by the ‘Traditional building character’ overlay. That overlay applies to houses built in 1946 or earlier and seeks their retention as part of any development, unless they are structurally unsound. (BCC 2025a, 2025c)

Recognising the house demolition constraint in some areas, Figure 2 illustrates by SA2 the reported value of residential alterations (including additions and conversions) associated with building approvals in Brisbane City LGA over the period from July 2016 to December 2024 (ABS 2021, 2025a). Those SA2s with less than 1000 houses or with a total value of alterations of less than $20,000 per total dwellings are not shown.

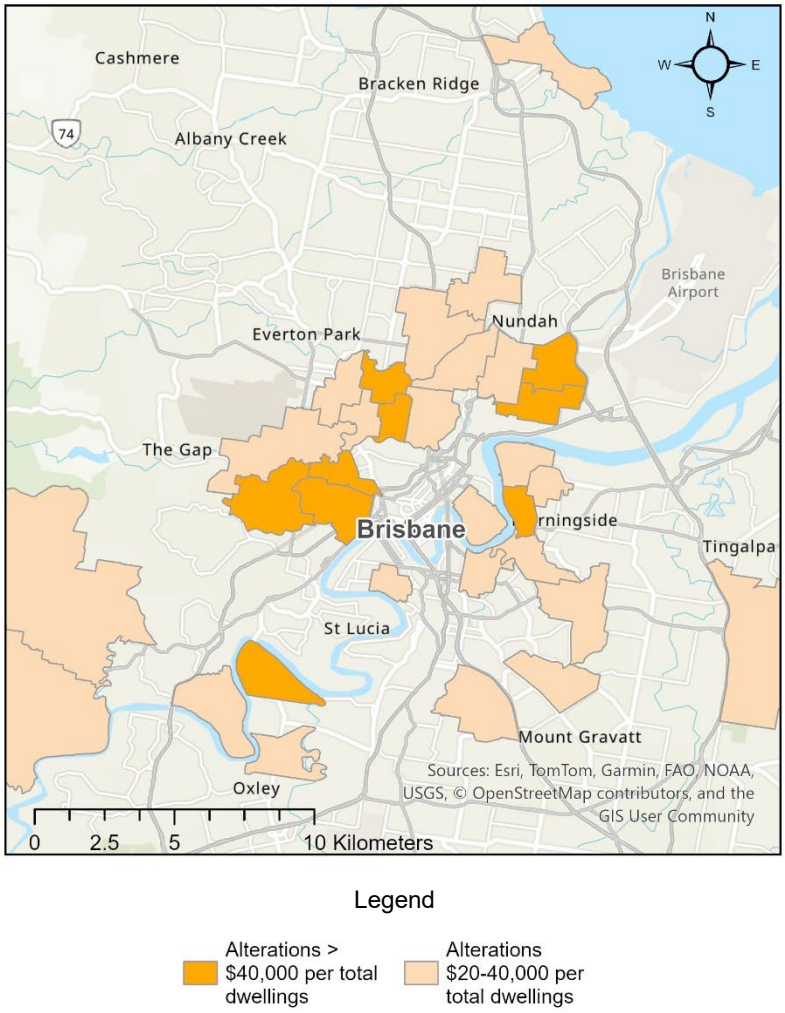

Figure 2: Brisbane City SA2s with higher values of alterations per total dwellings, 2016-2024

Those areas with higher values of alterations are inner-middle, bayside or rural residential suburbs, including some overlaps with those middle suburbs that have higher rates of house demolitions and replacements as shown in Figure 1. It should be noted that a significant proportion of house and other dwelling improvements, e.g. bathroom and kitchen renovations involving no structural changes, do not require building approval and so are not reflected in these figures.[2]

Many of the SA2s that have had higher rates of house demolitions/replacements and/or alterations in recent years also have higher median house prices, as shown in Figure 3 (ABS 2021; realestate.com 2025). The higher median house prices are predominantly in inner-middle suburbs and outer rural residential areas.

[2] Due to the difficulty of making additions and alterations to other dwellings that are part of a Community Title Scheme (CTS), where the nature of the changes requires building approval, it is expected that the reported alterations and additions relate primarily to houses.

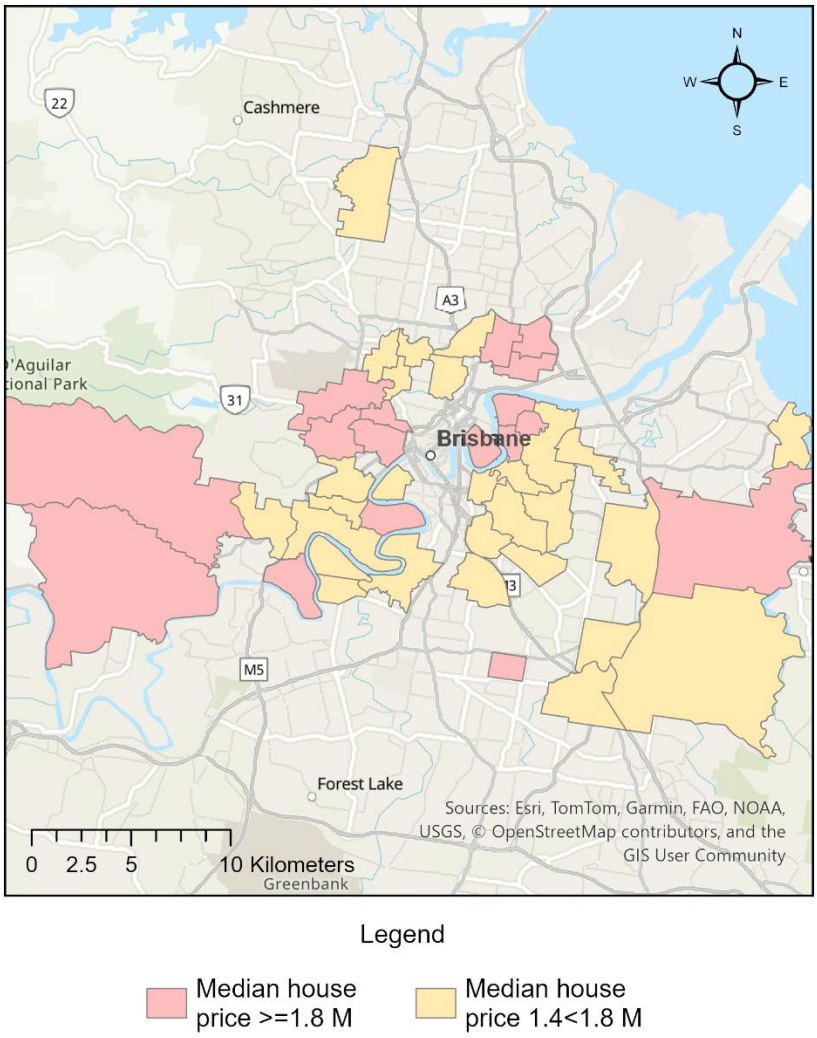

Figure 3: Brisbane City SA2s with higher median house prices (as at March 2025)

Many of the same areas have also had relatively high rates of house price growth over the 2016-2025 period, as shown in Figure 4 (ABS 2021; Healy 2022; realestate.com 2025). However, some other suburbs have also experienced such price growth, and some inner-middle suburbs that already had high house prices did not experience the same level of recent price growth, e.g. Ascot, Bulimba, Balmoral, East Brisbane, New Farm and West End.[3]

[3] The median sales price data by SA2 is based on the closest equivalent suburb for which information was available from the identified sources.

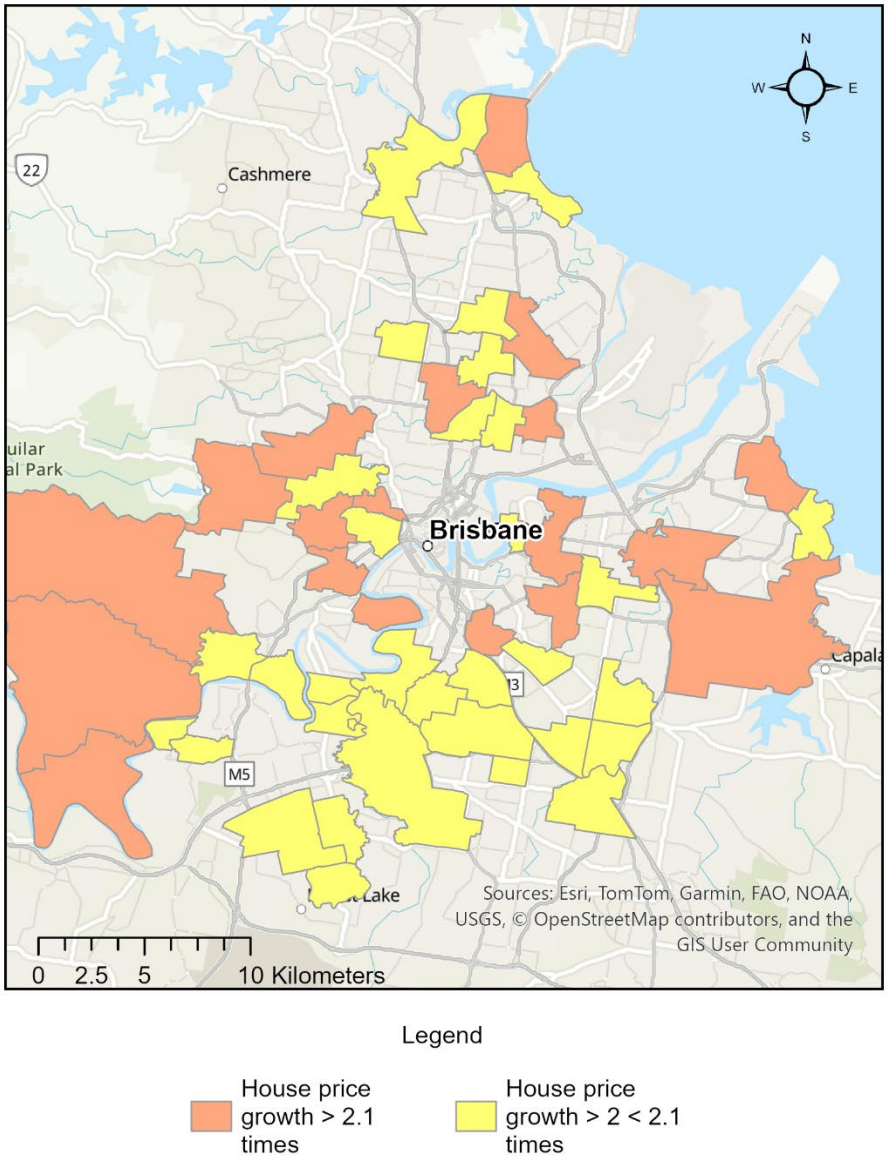

Figure 4: Brisbane SA2s with higher rates of house price growth (July 2016 to March 2025)

Inner-middle SA2s, generally within 10 km of the CBD, that notably have higher values in all four of the house improvements and price variables in figures 1 to 4 include:

- Ashgrove, Bardon, Camp Hill, Clayfield, Hawthorne, Hendra, Holland Park, Tarragindi and Wooloowin-Lutwyche.

Those inner-middle SA2s that have higher values in three of the four house improvements and price variables include:

- Alderley, Balmoral, Bulimba, Chelmer-Graceville, Corinda, Fig Tree Pocket, Grange, Greenslopes, Kedron-Gordon Park, Morningside-Seven Hills, Newmarket, Norman Park, Paddington-Milton, Red Hill, Sherwood, Toowong, Wavell Heights and Yeronga.

Together these sets of SA2s provide a useful focus for further investigation of the impacts of gentrification of houses on the scope for future low-medium density infill development. Figure 5 shows all of those SA2s combined as the ‘Focus Area’ (ABS 2021).

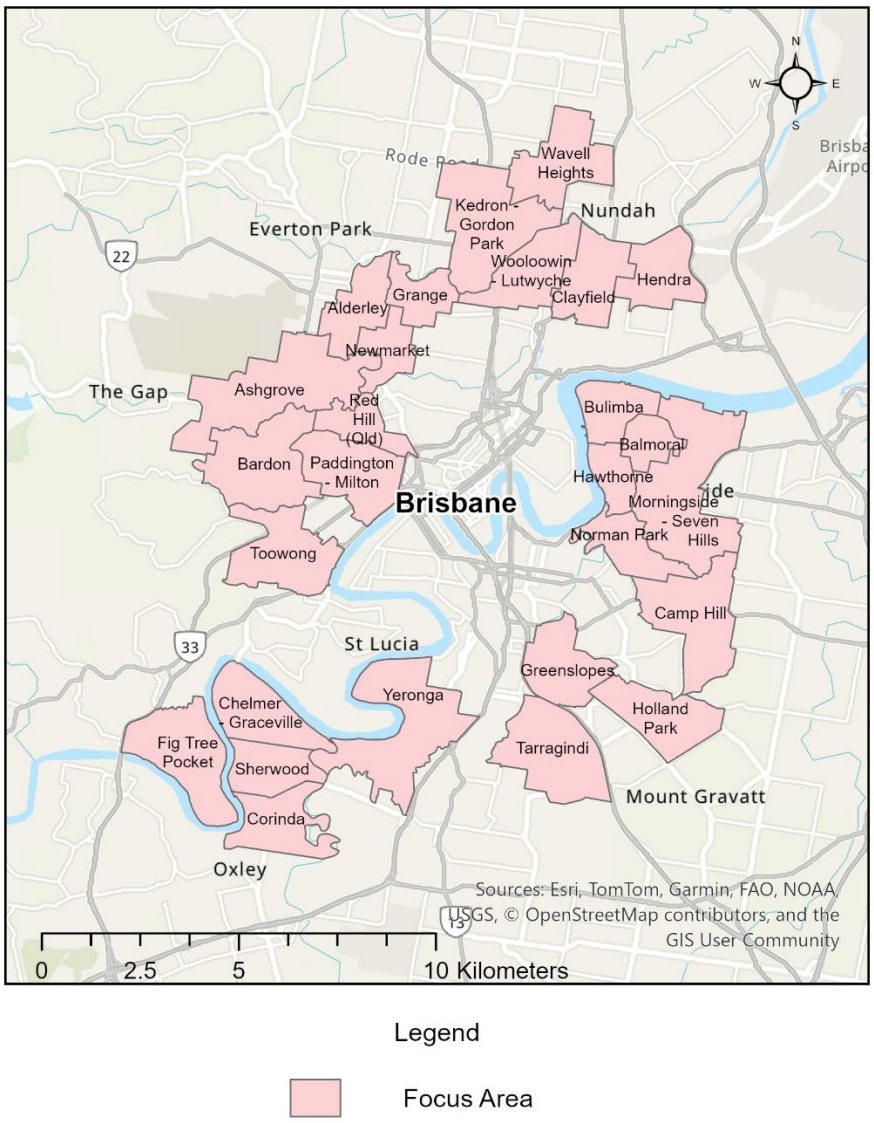

Figure 5: Focus Area of Brisbane SA2s

Most of the Focus Area SA2s were identified by the previous research as stable affluent/exclusive areas or at least at risk of becoming exclusive. Corinda and Wavell Heights were identified as ‘Gentrifying or at risk of gentrifying’ over the 2006 to 2016 period. (Nicholas 2023; Pegler et al. 2020)

The level of house improvements observed over the 2016-2024 period might therefore be considered as much a consequence of gentrification as an indicator of gentrification in process.

Changes in areas with potential for low-medium density redevelopment

The Focus Area includes significant areas planned for low-medium density residential development. For the Brisbane City LGA, under the current Brisbane City Plan 2014, such low-medium density residential areas are taken to include the following component precincts of the identified zones:

- Character residential zone
    - Infill housing precinct (CR2)

      Intended for retention of existing houses (built 1946 or before) and compatible low-rise (up to 2 storeys) dwellings at a maximum density of one dwelling per 300 m^2 (minimum 'small lot'[4] 300 m^2).
- Low-medium density residential zone
    - 2 storey mix precinct (LMR1)

      Intended for low-rise residential buildings, including predominantly 1 or 2 storey houses, multiple dwellings (such as apartments and row houses) and dual occupancy (minimum small lot 260 m^2).
    - 2 or 3 storey mix precinct (LMR2)

      Intended for low-rise residential buildings, including predominantly 2 but up to 3 storey multiple dwellings as well as houses and dual occupancy (minimum small lot 260 m^2).
    - Up to 3 storeys precinct (LMR3)

      Intended for predominantly 3 storey multiple dwellings (minimum small lot 180 m^2). (BCC 2025a)

A key overarching consideration for these zones and precincts is the extensive 'Traditional building character' overlay which applies to all of the Character residential zone and much of the Low-medium density residential zone. That overlay seeks to protect residential buildings built in 1946 or earlier, unless they are structurally unsound, and to ensure any redevelopment complements the traditional building character. The Heritage and Pre-1911 building overlays also constrain house demolition. (BCC 2025a, 2025c)

In considering the potential impact of house gentrification on future low-medium density infill development, including areas that might be considered for upzoning over time, it is useful to look at the recent nature of development in such zones and precincts in the Focus Area. To the extent improvement of houses has occurred in areas already planned for low-medium density development, this is an indicator of the likely constraint that already gentrified areas may have on any future plans for low-medium density redevelopment. To the extent areas currently included in the Low density residential zone (LDR) provide scope for future upzoning for low-medium density development, it is important to also consider changes in those areas.

For the purpose of comparison to the low-medium density residential zones/precincts, the current broad intent for the LDR is for houses of predominantly 1 or 2 storeys, with the minimum average small lot allowed being 400 m^2 (BCC 2025a).

[4] A 'small lot', generally intended for a house, is less than 450 m^2 (or less than 600 m^2 – excluding the access way - for those with road access via an access way). A separate code applies to the development of houses on small lots. (BCC 2025a)

The most readily available indicator of house gentrification at the property level is small lot re-subdivisions involving separate freehold title for each new lot for a house. In comparison, most low-medium density redevelopment for other dwellings involves the creation of a Community Title Scheme (CTS).[5]

Table 1 therefore reports on the total new infill[6] lots created over the 2016-2025 period by each method, by zone/precinct across the Focus Area. It also reports on development in the same zones/precincts over the 2001-2016 period for the purpose of comparison.[7] Due to their constraint on house demolitions, and therefore redevelopment potential, the Traditional building character, Heritage and Pre-1911 building overlays combined are also applied as a subset to the analysis. They are referred to generically as 'House demolition control' being 'Yes', with 'No' being those areas where there is no constraint on house demolition.

Table 1: New infill lots created by zone/precinct within the Focus Area, July 2016 to March 2025 (figures for July 2001 to June 2016 included in *greyed italics*)[8]

Zone/precinct/ demolition control		New freehold lots			New CTS lots			Total zone/precinct land area (ha)
		Lots	Area (ha)	Density (lots/ha)	Lots	Area (ha)	Density (lots/ha)	
LDR								
House demolition control	Yes	20 *78*	1 *4.2*	20 *19*	10 *16*	0.3 *0.2*	33 *72*	61.3
	No	785 *1,297*	35.7 *64.8*	22 *20*	23 *87*	0.2 *1.9*	95 *46*	1,839.1
	Total	805 *1,375*	36.7 *69*	22 *20*	33 *103*	0.5 *2.1*	66 *49*	1900.4

[5] In this instance 'freehold' lots refers to standard Torrens title lots where the individual landowner owns all of the land and the buildings. Individual 'CTS' dwelling lots are also owned freehold, but parts of the CTS, including the building and land in the case of apartments and communal land and facilities in the case of some town houses, are common property jointly held by the 'body corporate' of individual lot owners in that CTS.

[6] 'Infill' refers to new lots created from original lots that were from 400 to 2500 m^2 in total land area. For ease of data compilation, only those CTS in which all lots are on the one survey/registered plan are included here, but this represents 97 per cent of all relevant-sized CTS across the low-medium density residential areas of the Focus Area.

[7] The planning provisions applying to the area for most of the 2001-2016 period, under the previous City Plan 2000, were similar but somewhat different to the current provisions (BCC 2025d, 2025e). However, as Table 1 indicates, the dwelling densities achieved over the two periods are similar.

[8] Determination of which zones, precincts and overlays the base land parcels were located in was based on the ArcGIS Pro 'Selection by location' where the parcels 'Have their centre in' the relevant zone, precinct or overlay. There may be some instances where the shape of the land parcel means its centroid is outside the parcel, but this is relatively unlikely for these infill parcels of 400-2500 m^2.

Zone/precinct/ demolition control		New freehold lots			New CTS lots			Total zone/precinct land area (ha)
		Lots	Area (ha)	Density (lots/ha)	Lots	Area (ha)	Density (lots/ha)	
CR2								
House demolition control	Yes	216 *427*	7.4 *16.5*	29 *26*	211 *472*	3.6 *8.3*	59 *57*	394.3
	No	0 *0*	0 *0*	na *na*	0 *0*	0 *0*	na *na*	0
	Total	216 *427*	7.4 *16.5*	29 *26*	211 *472*	3.6 *8.3*	59 *57*	394.3
LMR2								
House demolition control	Yes	426 *632*	13.1 *19*	33 *33*	833 *1,879*	12.4 *29.8*	67 *63*	480.8
	No	177 *350*	4.6 *10.1*	38 *35*	1,150 *2,921*	13.8 *41.9*	83 *70*	386.6
	Total	603 *982*	17.7 *29*	34 *34*	1,983 *4,800*	26.3 *71.6*	75 *67*	867.4
LMR3								
House demolition control	Yes	2 *4*	0.05 *0.3*	40 *13*	26 *0*	0.4 *0*	70 *na*	5
	No	18 *4*	0.4 *0.1*	45 *40*	42 *212*	0.6 *3.3*	75 *64*	22.6
	Total	20 *8*	0.45 *0.4*	44 *20*	68 *212*	0.9 *3.3*	73 *64*	27.6

Source: Integrated compilation derived from: QG 2022a, 2022b, 2025a; BCC 2025a, 2025b, 2025c

Insights from Table 1 include:

- most low-medium density residential development has been occurring in the LMR2 precinct, with a smaller but significant proportion in the CR2 precinct. The LMR3 precinct is only a small proportion of the Focus Area and the LMR1 precinct is not present in the Area;
- of the main low-medium density residential development areas, 16.7 and 9.1 per cent, respectively, of the total zoned LMR2 and CR2 areas were developed as either freehold or CTS infill lots over the combined 2001-2025 period;
- the house densities on new freehold lots in both the LMR2 and CR2 precincts are about half of the corresponding other dwelling densities on new CTS lots. This

suggests houses at such densities are able to feasibly compete with other dwelling development for some sites. Those house densities are only about 1.5 times those achieved in the LDR zone, which is indicative of the difficulty of achieving higher density redevelopment on such sites if currently gentrified LDR areas were upzoned to LMR2, for example;

- houses on freehold lots have been a somewhat higher proportion of overall dwelling development in the low-medium density areas during the 2016-2025 period than they were during the 2001-2016 period – 27 per cent versus 21 per cent, respectively, in the combined LMR2 and CR2 areas.

Of course, in association with the creation of new freehold lots for houses, improvements to houses in the Focus Area have occurred through both replacement of and alterations and additions to existing houses, as described in 'Improvements to houses in recent years' above.

Across the whole Focus Area, as shown in Figure 6 below, building approvals over the 2016-25 period show a decline in other dwelling approvals compared to the start of the period, while house approvals have remained fairly constant (ABS 2025b). For a highly accessible inner-middle suburban area that has been completely urbanised for well over 50 years, the rate of approvals for new houses seems high, being 39 per cent of all approvals over the whole 2016-25 period, up to 50 per cent in 2019-20 and 2023-24, and never less than 31 per cent of the total in any year.

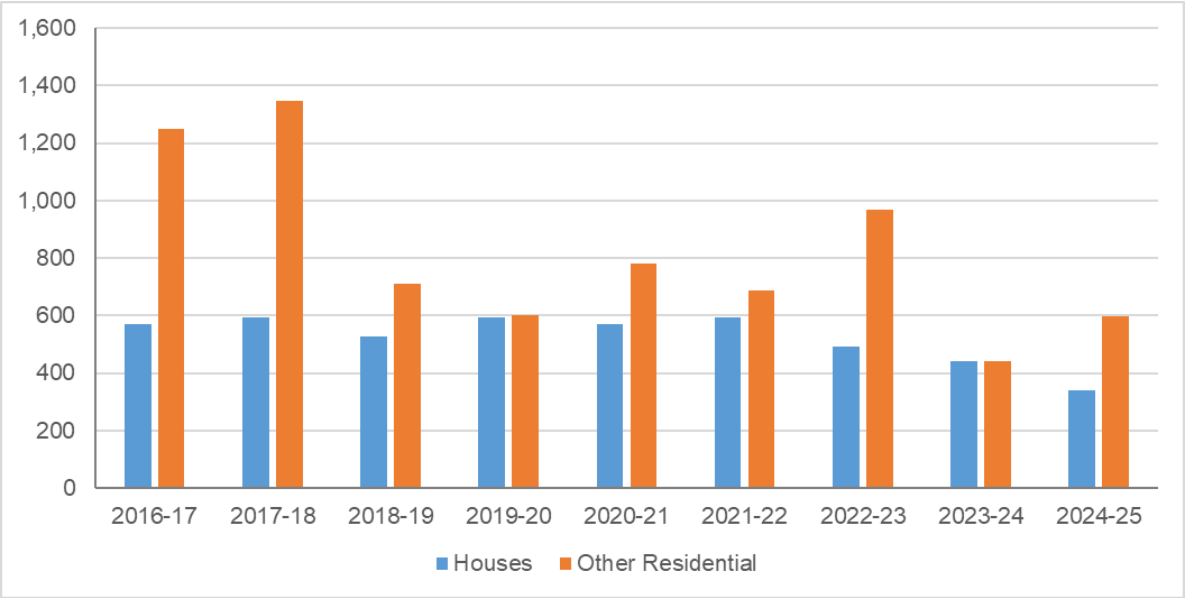

Figure 6: New house and other residential building approvals in the Focus Area, 2016-2025[9]

Some of these new houses would have occurred at an increased density without further subdivision. This is because some older houses in inner Brisbane were built across two or more original lots, which can each be sold and occupied separately if the original house is demolished or located on or relocated onto just one of the lots. Of course, Figure 6 includes houses in the LDR zone as well as existing low-medium density residential areas.

Including examples of the noted circumstance of one house being built over two or more lots, Figure 7 illustrates a range of original and more recent house, other dwelling and subdivision circumstances in a small part of the Focus Area at Hawthorne (QG 2025b).

[9] The year 2024-25 is only to February 2025.

Figure 7: Examples of house and other dwelling development and associated subdivision pattern in Hawthorne (see explanation of examples, as numbered, below)

The area shown in Figure 7 is included in both the LMR2 precinct and the Traditional building character overlay (BCC 2025b, 2025c). The original urban subdivision was created through Registered Plan RP12486, comprising 405 m^2 lots, many of which remain. The distinct subdivision/dwelling examples, as numbered in red, are as follows:

(1) These are CTS, each created from two original lots, both being developed prior to 2001, one comprising eight and the other six dwellings.

(2) These are examples of houses on the original lots being either completely replaced with new houses or substantially extended and refurbished. In the case of the example on the upper-right, two large 2-storey houses have replaced one older house. In the lower-left example, one large 2-storey house has replaced an old house on the right-hand lot and an original house on the left-hand lot has been extended and refurbished.

(3) This is an example of where two of the original 405 m^2 lots were amalgamated at an early stage. Since 2016 the block of four flats built on that combined lot have been demolished and the lot re-subdivided into two new 405 m^2 lots with large 2-storey houses constructed on each of them.

(4) These are two examples of single houses being built across two original lots. Both houses appear to have been refurbished while the one on the left has also been substantially extended.

(5) This is an example of where three original 405 m^2 lots have been re-subdivided early into two 607 m^2 lots. The house on the left has been substantially extended and refurbished while the house on the right appears to have had only limited change.

(6) This house is on an original small lot and appears close to its original form with some recent refurbishment.

The un-numbered property in the upper-right of Figure 7 is now a child care centre located on an early amalgamation of two original lots. (Google 2025; QG 2025b)

Figure 7 provides a small snapshot of changes that have occurred in the Focus Area, which may be repeated in various forms and combinations across the Area. In this particular set of examples, there would appear limited scope for future higher density redevelopment up to the other dwelling potential provided for by the LMR2 precinct, for example.

However, more detailed property-level investigation would be required more broadly across the Focus Area to provide a better understanding of higher density other dwelling development potential overall. Up to now, other dwelling development still represents most of new housing in the Focus Area, as reflected in both Table 1 and Figure 6. Also, although significant, the development reported in Table 1 for the 2001-2025 period represents only about 14 per cent of the areas currently zoned LMR2 and CR2 combined.

Relative values of houses versus other dwellings

Among other things, the previous section noted the apparent shift towards houses being a higher proportion of new dwellings in the Focus Area over the 2016-2025 period.

In this context it is interesting to note the changes in the median prices of houses and other dwellings between 2016 and 2025. Figure 8 compares the ratio of house to other dwelling prices based on the median prices for the year to March 2025 versus the year to July 2016, by SA2 within the Focus Area. (Healy 2022; realestate.com 2025)[10]

In all except one SA2, the 2025 ratio is significantly higher than that for 2016, with the mean of the ratio across the identified SA2s increasing from 1.6 to 2.2. This would appear to indicate an increased preference for houses in the Focus Area. That is consistent with houses being a higher proportion of the new lots created in low-medium density areas over the 2016-2025 period compared to the 2001-2016 period. It is also consistent with houses being an increased proportion of new dwelling building approvals across the Focus Area during later years of the 2016-25 period. As a development option, even though they provide only about half of the dwelling density in low-medium density areas, houses have been better able to compete with other dwellings in recent years due to the relatively higher value

[10] Those SA2s within the Focus Area that are not included in the graph have no reported median prices for other dwellings for one or both years, from the nominated sources.

placed on them. Of course, the house improvements reported herein will have contributed to this growth in relative values, but new other dwellings have continued to be developed also.

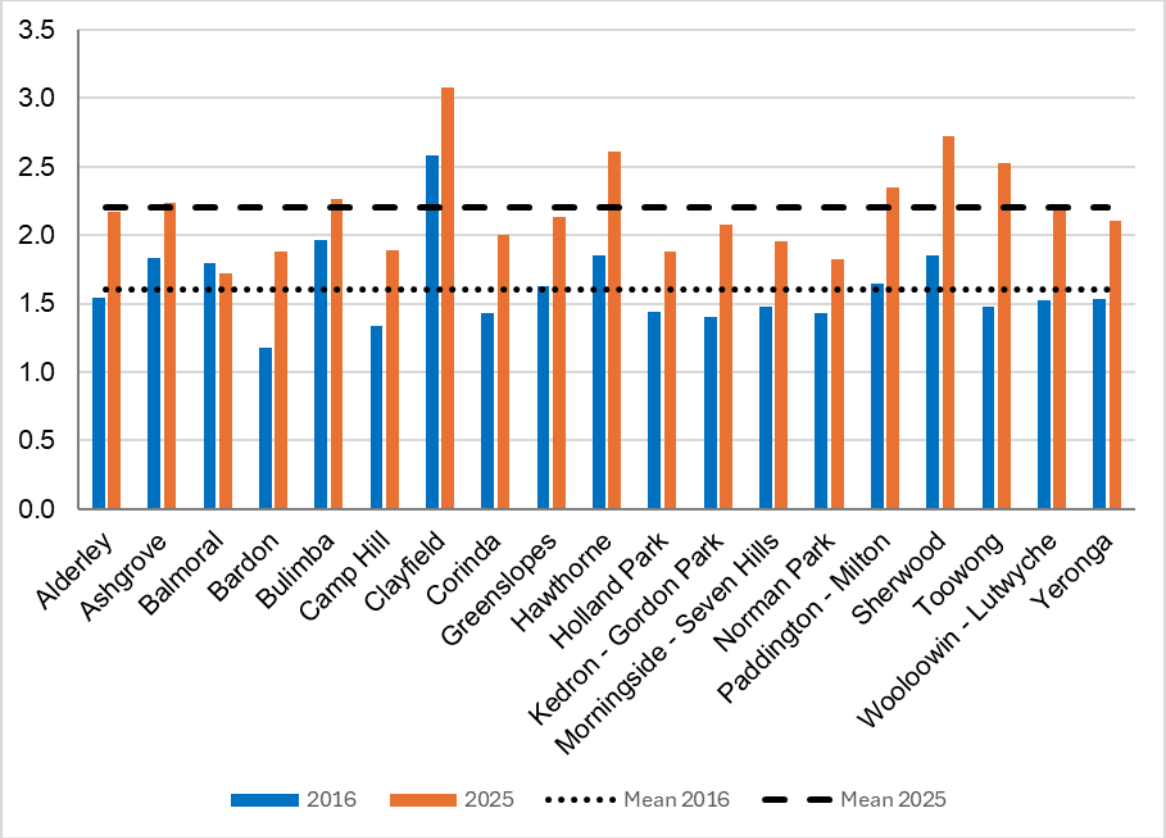

Figure 8: Ratio of median sale price for houses to the median sale price for other dwellings in the year to March 2025 versus the year to July 2016, by SA2 in the Focus Area

Conclusions

The above analysis provides evidence of a high level of improvement to houses in the inner-middle suburbs of Brisbane. This has occurred in areas which previous research found to be largely already gentrified and now stable, affluent areas.

The combination of house improvements and higher relative values indicates an apparent shift in preference towards houses in low-medium density areas. In some areas houses, at about half the dwelling density, appear able to compete favourably with higher density other dwelling development.

Most new housing developed in the Focus Area is still other dwellings. However, the high and increasing rate of new houses, and the apparent improvements to existing houses, warrant further property-level research across a broad area of inner-middle Brisbane.

Such research could better inform the realistic scope for continued development of higher density other dwellings in areas currently zoned low-medium density residential. At the very least, it could result in a reassessment of the overall expected dwelling yields from such areas. It could also help to assess the likely feasible yield from any potential upzonings in areas currently zoned low-density residential.

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