Urban Development Institute of Australia
NATIONAL

UDIA National Housing Pipeline®

NHP 2025

Developer Survey Overview,
FAQs &
Step-by-Step How-To-Guide

July 2025

UDIA National Housing Pipeline®: 2025 Developers Survey Overview

- UDIA's National Housing Pipeline® (NHP) project has been designed to provide an objective and robust assessment of the state of play of *land availability* and *land readiness* for residential development across Australia's major housing markets.
- A core objective of the UDIA NHP program is to provide a development industry 'vetted' quantification of the forward 10-year pipeline of land supply and residential dwellings anticipated for development, by location and dwelling type and tenure.
- A key input into the annual NHP reporting is data through our fit-for-purpose NHP Developer's Survey which is powered by the MapMySay survey platform.
- The annual NHP survey is focussed on UDIA's developer members providing intelligence and updates on the status of planning, development and environmental approvals, as well as the status of enabling infrastructure requirements for all owned/controlled undeveloped land holdings located across the NHPs Greater Metropolitan reporting regions.
- The NHP Developer Survey also asks for total residential yield capacity and year-on-year estimates of dwelling commencement by typology (i.e. houses, townhouses, apartments).
- The purpose of this document is to provide answers to frequently asked questions related to the NHP Developers Survey, and also provide a Step-by-Step guide to accurately completing the survey questions.

Figure 1: NHP 2025 Reporting Regions

1) What is the UDIA National Housing Pipeline (NHP)?

- *Launched in 2023 the NHP is annual UDIA research initiative which assembles various data sets to present a snapshot of land and residential dwelling supply as well as present an audit of development constraints and challenges to delivering new homes across Australia's major capital city regions.*

2) Why is UDIA collecting land supply and development constraints information?

- *The origins of the NHP go back to a nationwide and long running disconnect between official State Government monitoring and reporting of land supply information, and the development industry's on-the-ground perspective of forward land supply availability and 'development ready' stocks.*
- *The NHP has been developed to fill an empirical data and evidence gap, which UDIA is uniquely positioned to deliver through it's unparallelled access to developers' intentions for forward residential development.*
- *The NHP reporting is used in messaging to all levels of government as to the needs of the industry, with the NHP data providing clear evidence of forward-supply risks due to particular constraints/challenges/blockages in the development delivery process.*

3) How does the NHP work?

- *The NHP program is owned, driven and delivered by UDIA, and is assembled in close collaboration with UDIA members, local, State and Federal Government agencies, and key property sector stakeholders across the nation.*
- *The annual NHP program of activities comprises of five key phases spanning April to November each year, and is summarised in the below figure:*

Figure Two: UDIA NHP Annual Work Phases

4) Why does UDIA need property developers to complete the NHP Survey?

- *The assembly of data and insights directly from property developers regarding the status of their undeveloped land holdings and forecasts/expectations for delivery of new residential products is a unique and critical data input component to the NHP program. The nationally consistent assembly and incorporation of 'developers intentions' information to feed-into forward pipeline forecasting distinguishes the NHP supply monitoring from any other program operational across Australia.*
- *The inclusion of detailed and 'true' developers' intentions for delivery of new residential supply over a ten-year outlook window reduces the level of theoretical/modelled supply forecasting inputs that all other dwelling supply programs relay upon – especially for the medium term (i.e. 6-10 year).*

5) What sort of information does the NHP Survey seek to gather information about?

- *The NHP survey is collecting information from property developers on:*
    - *a) The precise boundaries of undeveloped land holdings.*
    - *b) The status of planning, development, and environmental approvals.*
    - *c) The status of enabling infrastructure requirements to unlock undeveloped land holdings, inclusive of water, sewer, power and regional road infrastructure.*
    - *d) The total residential yield capacity/expectations and year-on-year dwelling commencements by type and by tenure.*
    - *e) Additional intelligence related to each undeveloped land parcel including the project/precinct name and the current feasibility to develop individual land holdings in the current economic and market environment.*

6) How will the UDIA use the information collected through the NHP Survey?

- *UDIA is collating data and insights for use as part of our evidence=base for solutions-focus advocacy with Government.*
- *UDIA takes great care to protect the confidentiality of information provided by NHP Survey participants, and will only publish aggregated NHP survey data information, and only represent individual land survey plots (developer land holdings) as deidentified dots on published spatial mapping outputs.*
- *Under no circumstances will UDIA transfer any raw NHP survey data to any third parties. Please read our Data Governance Policy for more information.*

7) How will developer's submitted information be kept confidential and secure?

- *UDIA has established various protocols to ensure that NHP survey data remains secure and confidential throughout NHP reporting cycle. Individual survey responses are deleted from the dedicated UDIA server infrastructure when no longer required. Please read our 'Data Handling Practice Note' for more information.*

8) Is the NHP survey covering infill/apartment development sites, or is it just greenfield land holdings?

- *The NHP Survey collects information on all land holdings which have potential for residential development yield across the entire breadth of each major capital city inclusive of greenfield and infill locations and covering all residential typologies including detached housing, townhouse, mid-rise and high-rise apartments.*
- *The NHP survey is also collecting information about residential tenure types including Affordable and Social Housing, Seniors and Land Lease.*

9) Are non-metropolitan/ regional areas covered by NHP Survey?

- *No, currently regional areas are not currently covered by NHP reporting. Please refer to Figure 1 for NHP 2025 reporting coverage.*
- *Please note that the Hunter, Central Coast and Illawarra regions are covered in NSW reporting and all 11 South East Queensland LGAs are covered in QLD reporting*.

10) Can I obtain access to spatial mapping and core NHP reporting data and files?

- *Requests for spatial and tabular reporting data from the NHP reporting are treated on a case-by-case basis. No agreed releases of NHP reporting data will include individual NHP project site intelligence. All data requests should be directed to the UDIA national office (udia@udia.com.au).*

For further questions regarding the NHP Survey or the broader NHP Program please contact UDIA NHP Project Lead Toby Adams (tadams@udiawa.com.au)

UDIA NHP Developer Survey: Step by Step How-To Guide

MapMySay

Welcome to the 2025 UDIA National Housing Pipeline® Survey

UDIA's National Housing Pipeline® Project is aiming to curate a development industry assessment of the short- and medium-term pipeline of land supply for forward residential development across each of Australia's capital cities.

The ultimate purpose of the National Housing Pipeline® Project is to provide an objective and robust measure that can be used by Federal, State and Local Governments that identifies how much 'Development Ready' land is available across the capital cities along with the expected residential yields year-on-year, so Governments can incentivise boosting housing supply across the spectrum and combat accelerating affordability challenges.

This Developer/Landowner survey is a critical data input component to the overall project. We are seeking survey participants to:

1. Accurately identify your land holdings or development project area/precinct boundaries – this includes greenfield subdivisions, apartments and townhouse-medium density development sites.
2. Provide an update on the status of the various approvals and enabling infrastructure requirements relevant for your project area/precinct.
3. Provide a forecast of the expected lot/dwelling release schedule from your project area over the forthcoming ten-year period.

UDIA will take great care to protect the confidentiality of information provided by participants to the National Housing Pipeline® Project survey and will only publish aggregated survey data responses. Please read our Data Governance Policy for more information.

Thank you for your participation in the UDIA National Housing Pipeline® Project survey. Don't hesitate to contact the Project Lead Toby Adams with any questions or queries you have about the survey and the forward use of the collected survey data.

E: tadams@udiawa.com.au

M: 0447 132 608

Introduction

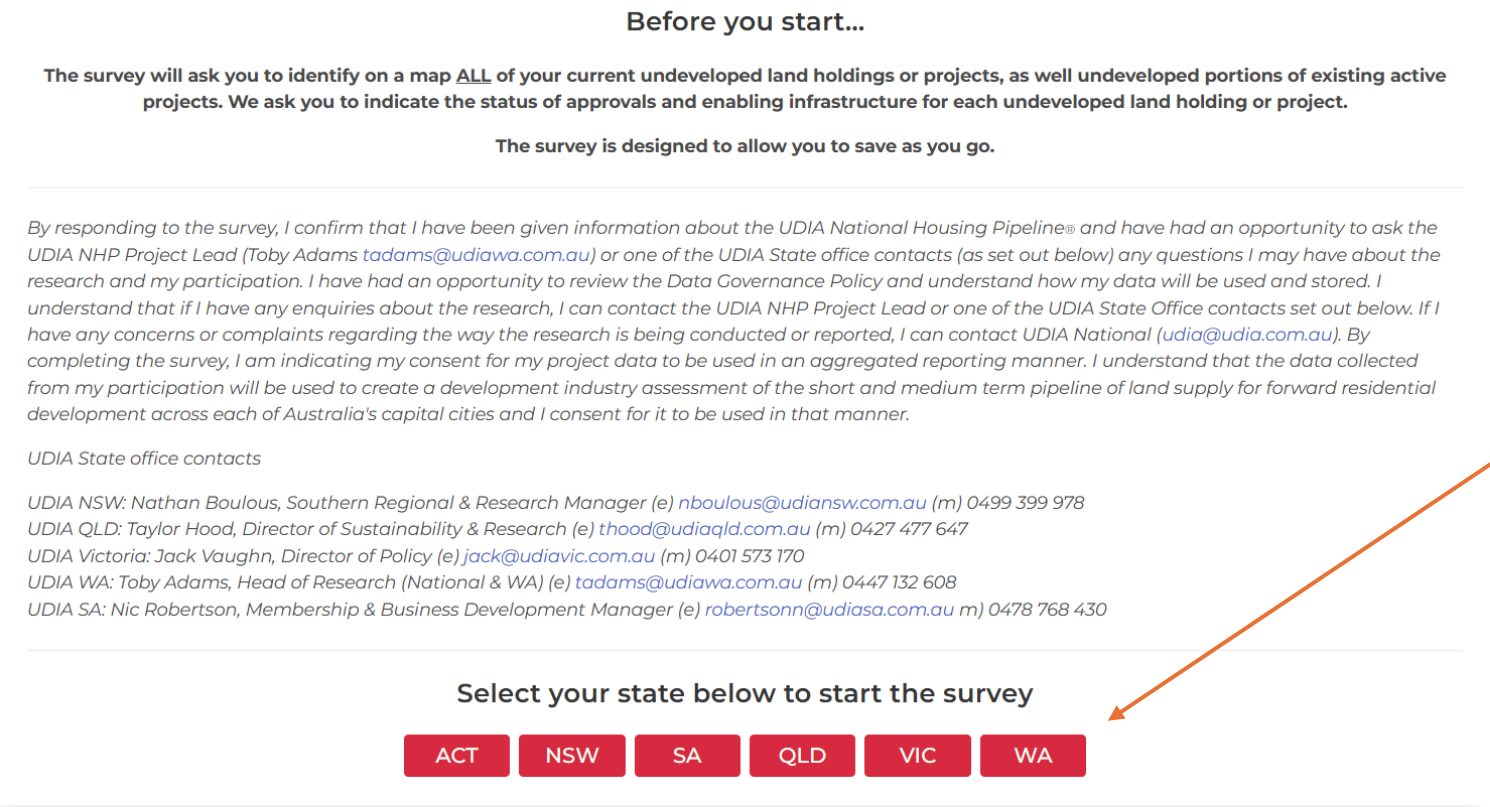
The NHP Survey has been created for UDIA's property developer members to provide data and status updates on all undeveloped land holdings – which are intended to be developed for residential dwellings.

This 'How-To' guide helps survey participants navigate through the survey tool, and also provides additional context/information not included in the survey form itself.

The NHP survey requires a range of information to be entered regarding individual land holdings (as outlined overleaf), and in 2025 we have introduced a 'save-as-you-go' functionality.

Please note: it takes on average eight minutes to complete the NHP survey questions for each development site/landholding – assuming the survey respondent has the necessary information to hand.

UDIA NHP Developer Survey: Step by Step How-To Guide



Before you start...

The survey will ask you to identify on a map ALL of your current undeveloped land holdings or projects, as well undeveloped portions of existing active projects. We ask you to indicate the status of approvals and enabling infrastructure for each undeveloped land holding or project.

The survey is designed to allow you to save as you go.

By responding to the survey, I confirm that I have been given information about the UDIA National Housing Pipeline® and have had an opportunity to ask the UDIA NHP Project Lead (Toby Adams tadams@udiawa.com.au) or one of the UDIA State office contacts (as set out below) any questions I may have about the research and my participation. I have had an opportunity to review the Data Governance Policy and understand how my data will be used and stored. I understand that if I have any enquiries about the research, I can contact the UDIA NHP Project Lead or one of the UDIA State Office contacts set out below. If I have any concerns or complaints regarding the way the research is being conducted or reported, I can contact UDIA National (udia@udia.com.au). By completing the survey, I am indicating my consent for my project data to be used in an aggregated reporting manner. I understand that the data collected from my participation will be used to create a development industry assessment of the short and medium term pipeline of land supply for forward residential development across each of Australia's capital cities and I consent for it to be used in that manner.

UDIA State office contacts

UDIA NSW: Nathan Boulous, Southern Regional & Research Manager (e) nboulous@udiansw.com.au (m) 0499 399 978
UDIA QLD: Taylor Hood, Director of Sustainability & Research (e) thood@udiaqld.com.au (m) 0427 477 647
UDIA Victoria: Jack Vaughn, Director of Policy (e) jack@udiavic.com.au (m) 0401 573 170
UDIA WA: Toby Adams, Head of Research (National & WA) (e) tadams@udiawa.com.au (m) 0447 132 608
UDIA SA: Nic Robertson, Membership & Business Development Manager (e) robertsonn@udiasa.com.au m) 0478 768 430

Select your state below to start the survey

ACT NSW SA QLD VIC WA

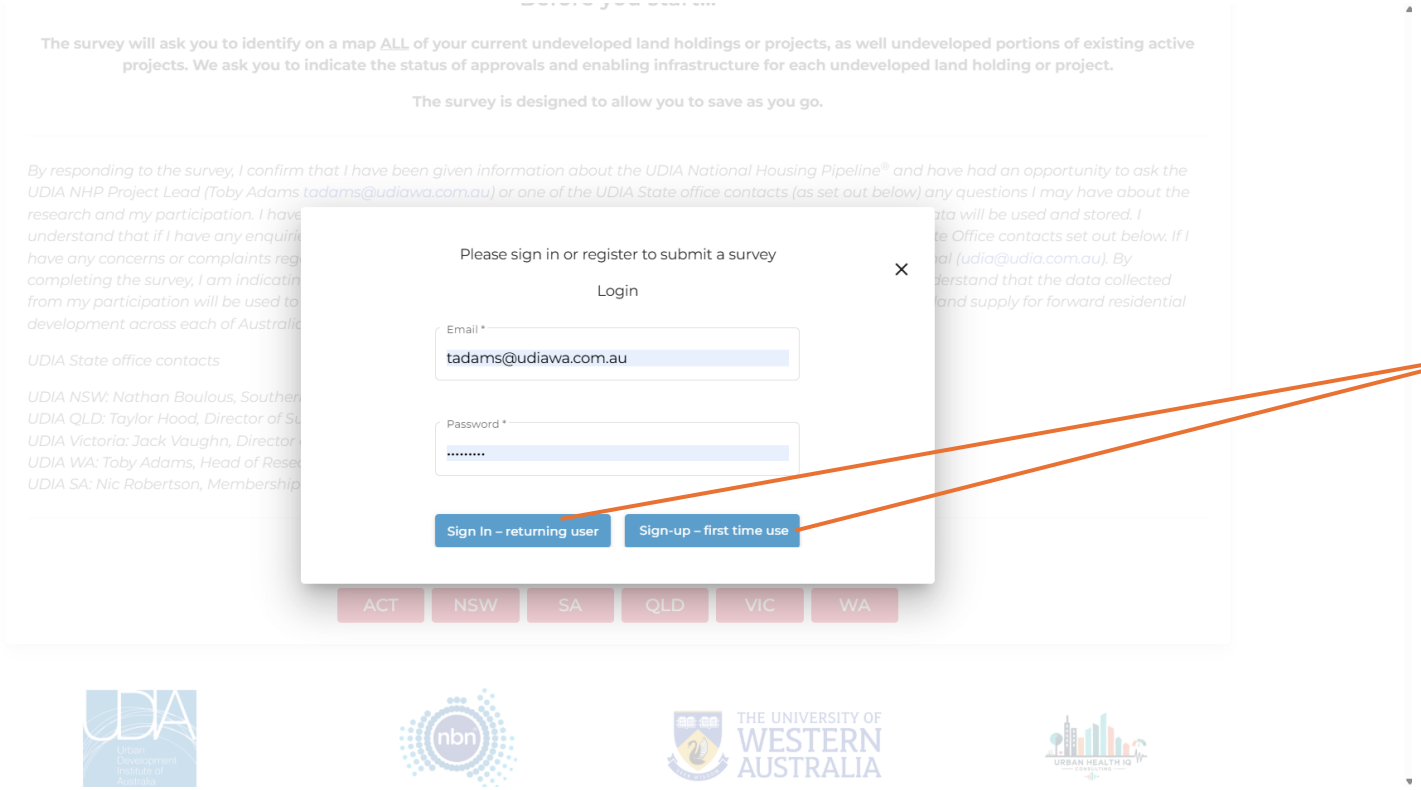
Step One: State selection

The first step in taking the NHP survey is to select a State for which you are entering development site information for.

By selecting a 'State' button a unique set of State/Territory specific survey questions will be generated for you to work through.

Each UDIA State Office division has sole access to the raw survey data submitted and is solely responsible for securely handling and storing. All queries regarding the NHP survey can be directed directly to the listed UDIA State office contacts or directly to NHP Project Lead Toby Adams tadams@udia.com.au

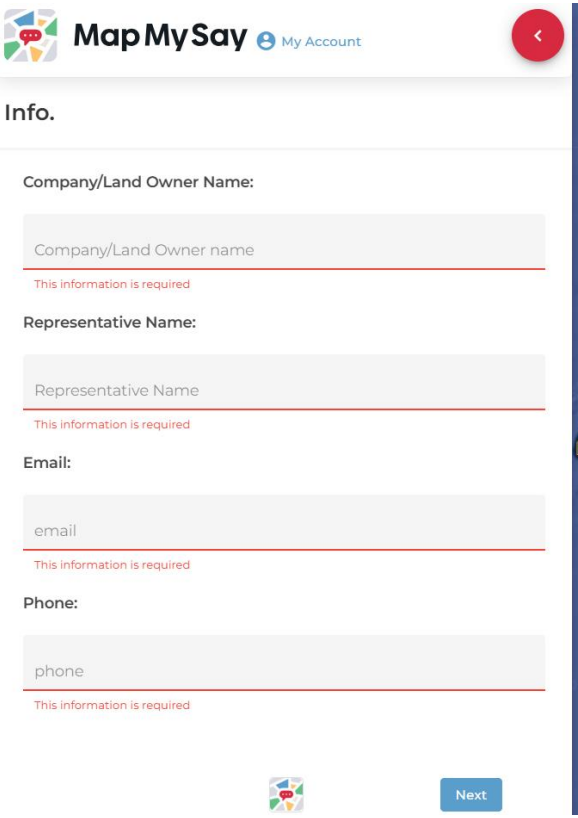
UDIA NHP Developer Survey: Step by Step How-To Guide



Step Two: Sign in or Register

This Step generates your unique log-in, allowing you to save-as-you-go and return to your survey window at a later date.

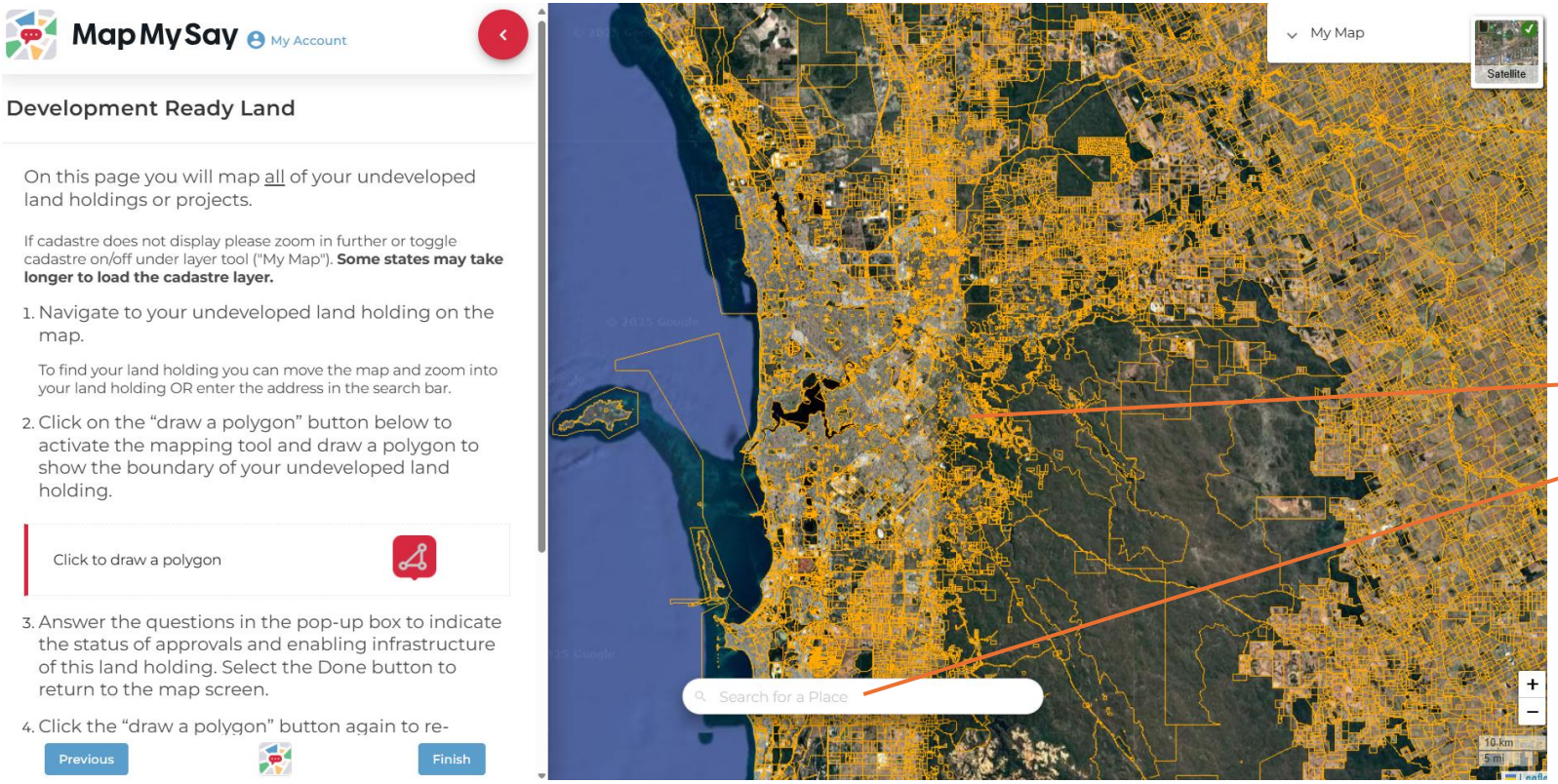
Click on ‘Sign-up – first time user’ to generate your own log-in, or ‘Sign In – returning user’ if you have previously created a log-in and are returning to the survey window.



Step Three: Enter Survey Respondent Details

This first pop-up box prompts the entering of survey responder details, with almost every question mandatory and requiring an entry in order to advance in the survey tool.

You'll just need to do this info stage once, as these details become affixed to your unique log-in profile. In subsequent visits to the survey tool, you will skip this window and recommence on the next stage of the survey.



Step Four: Navigating to your first landholding

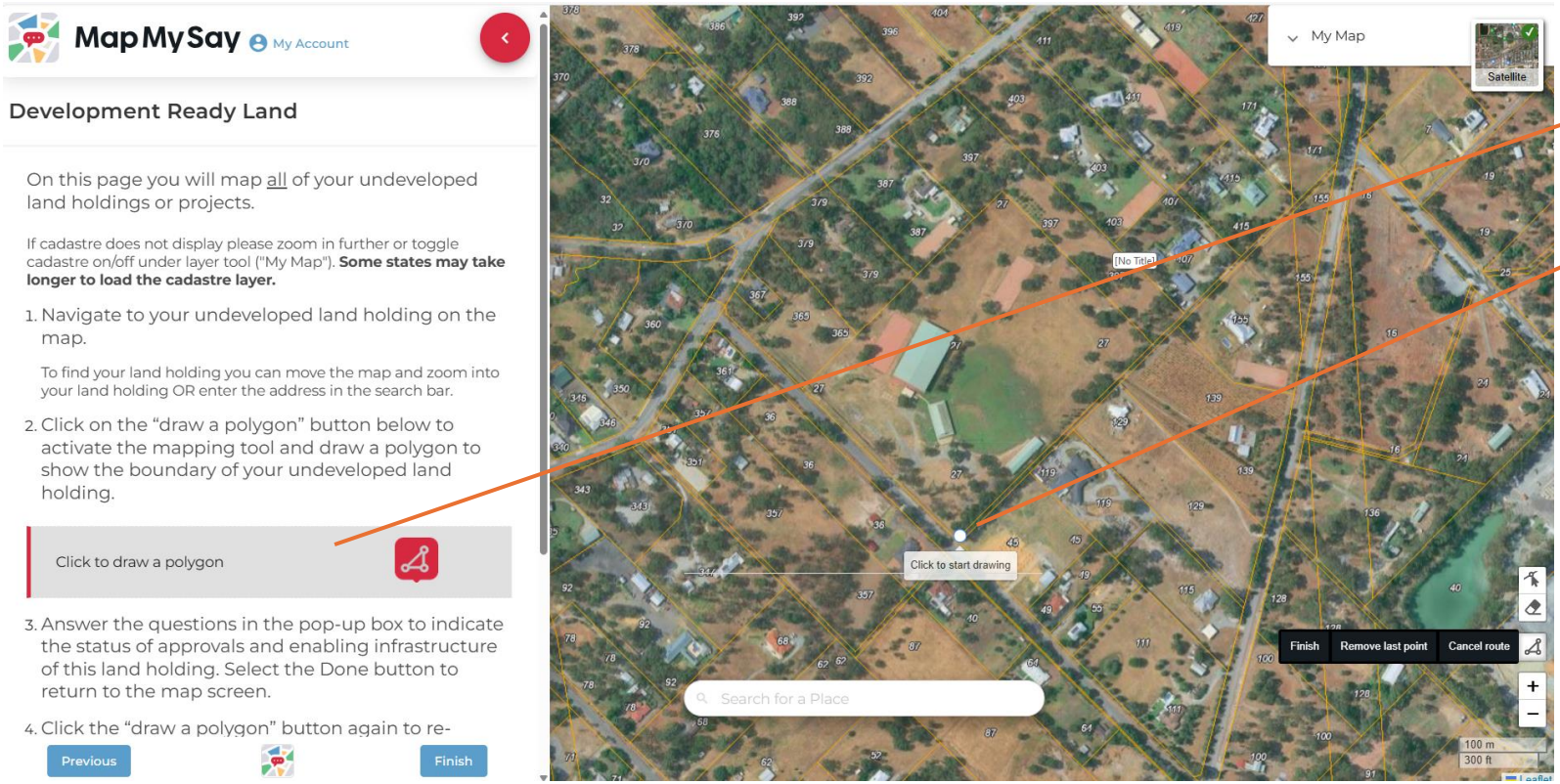
This stage involves the navigating to the location of your first landholding.

You can navigate to the landholding by either:

a) zooming into the interactive map to the correct location, or;

b) entering in a street address into the search bar in the map window

UDIA NHP Developer Survey: FAQs

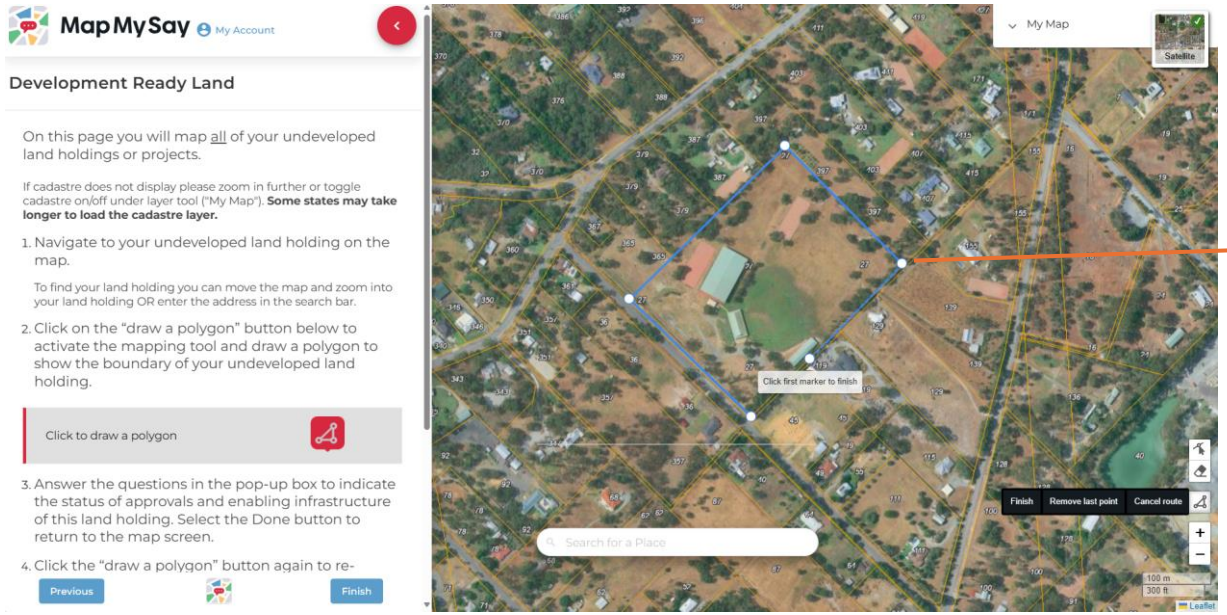


Step Five: Mapping your first landholding

Once you have navigated to the correct location (ready to map your first undeveloped landholding) click on the 'Click to draw a polygon' button.

This will activate the dynamic cursor, which you can position at a cadastral parcel edge to commence the drawing of a polygon.

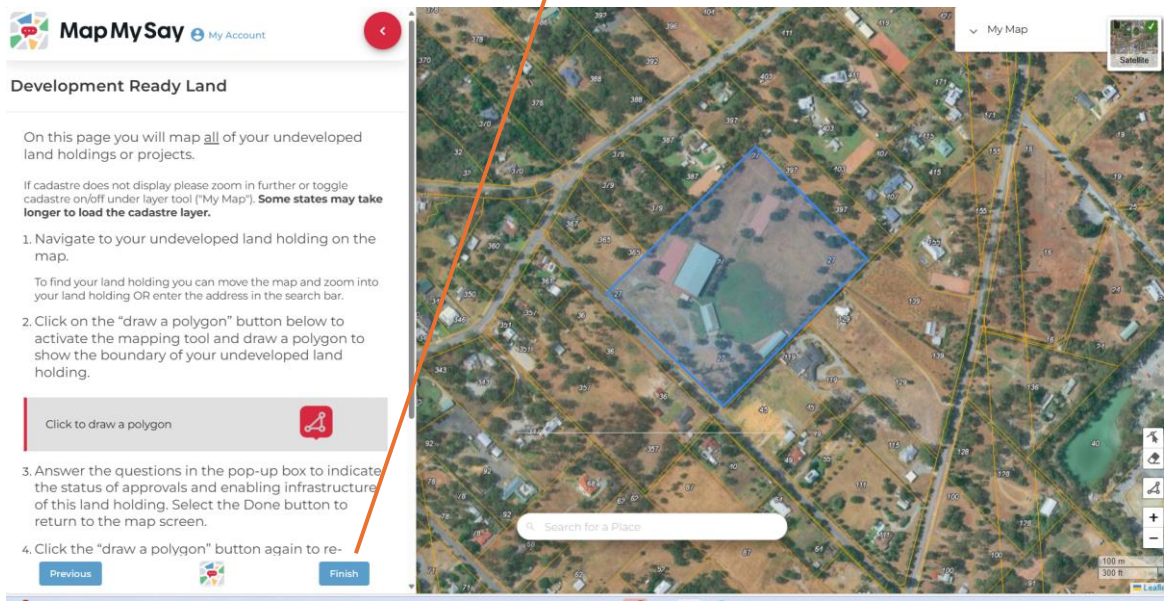
UDIA NHP Developer Survey: FAQs



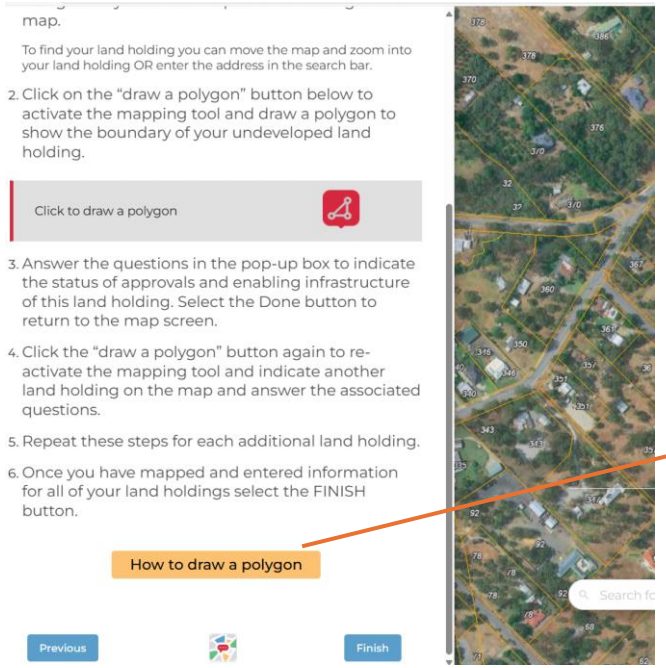
Step Five: Mapping your first landholding

Draw a polygon around each edge of the landholding and click back on the first marker to complete the site delimitation.

Once the polygon converts to a light shade, you have mapped your first landholding are now ready to progress to the next stage by clicking the 'Finish' button.



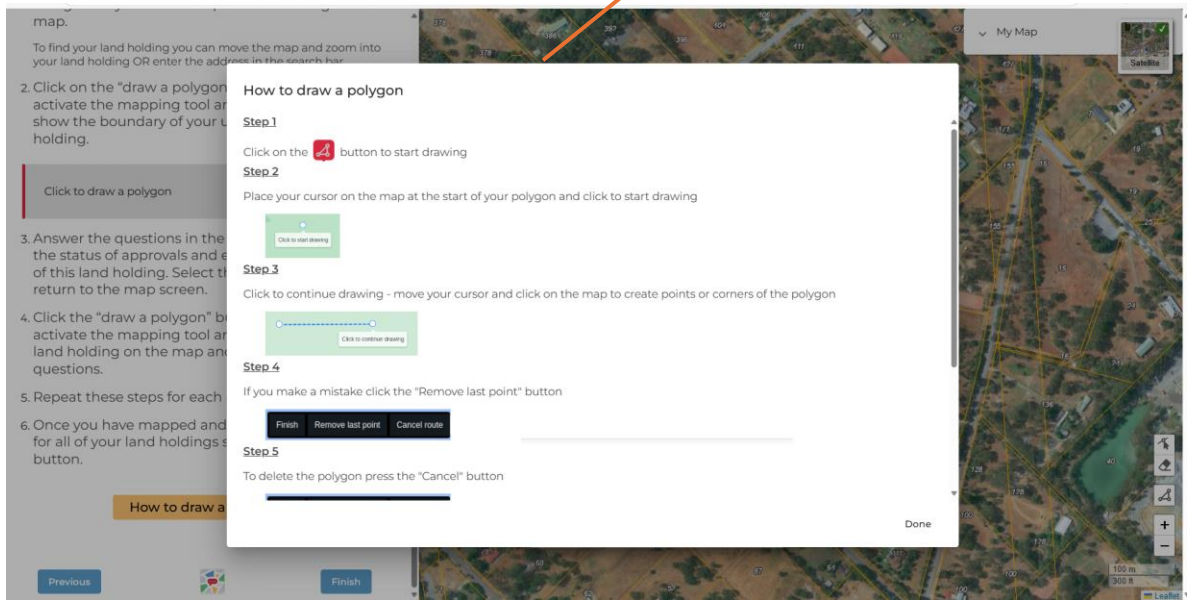
UDIA NHP Developer Survey: FAQs

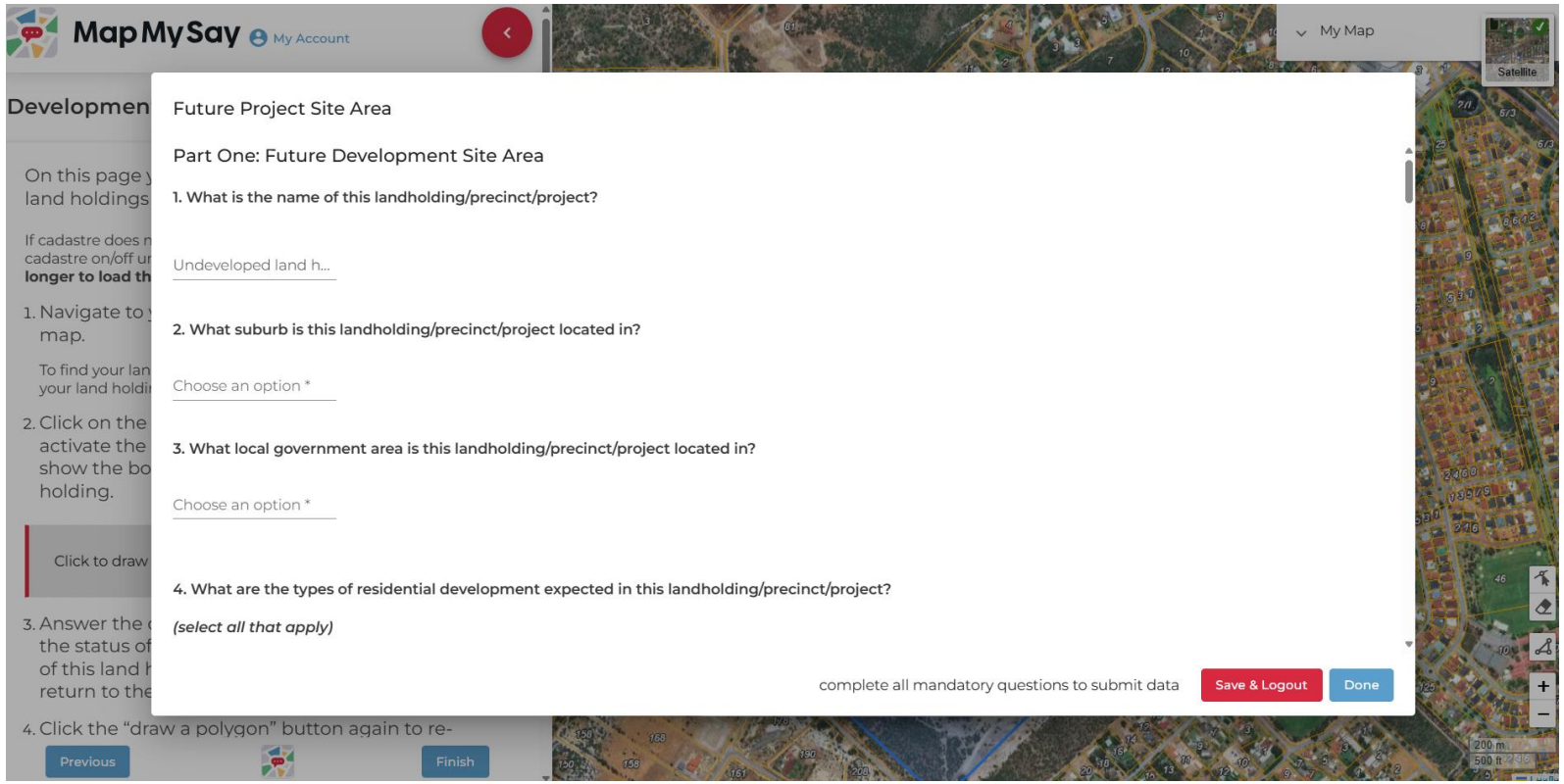


Step Five: Mapping your first landholding

A more fulsome set of instructions of how to draw a polygon is also available by clicking this button.

This pop-up guide will appear on clicking.

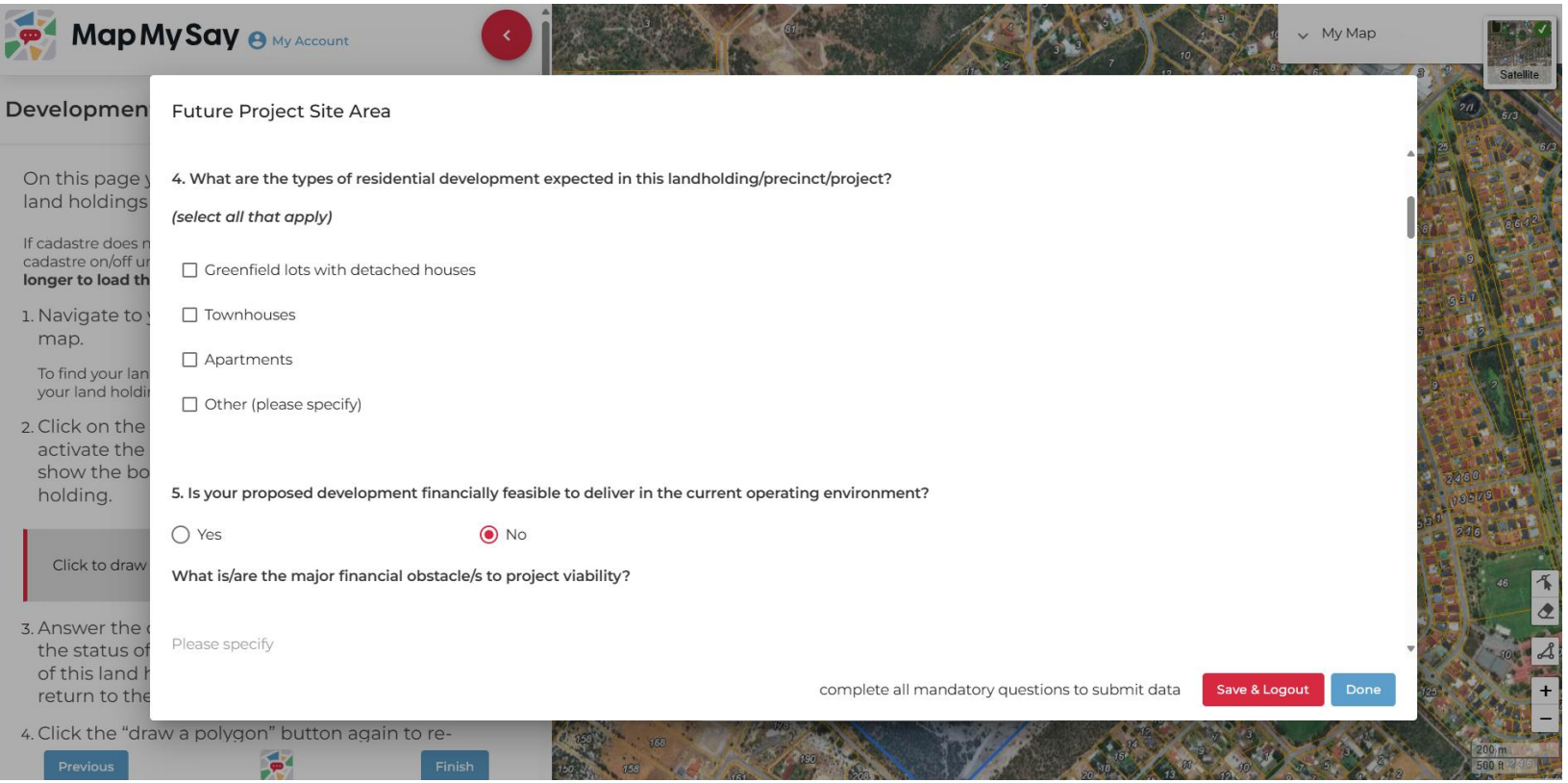




Step Six: Entering landholding information

Part One of this stage (Qs1-3) involves entering responses to top line questions regarding the name and location of land holding/future development site.

Please note – almost every question in the survey is mandatory so a response is required for each question posed in the survey tool.



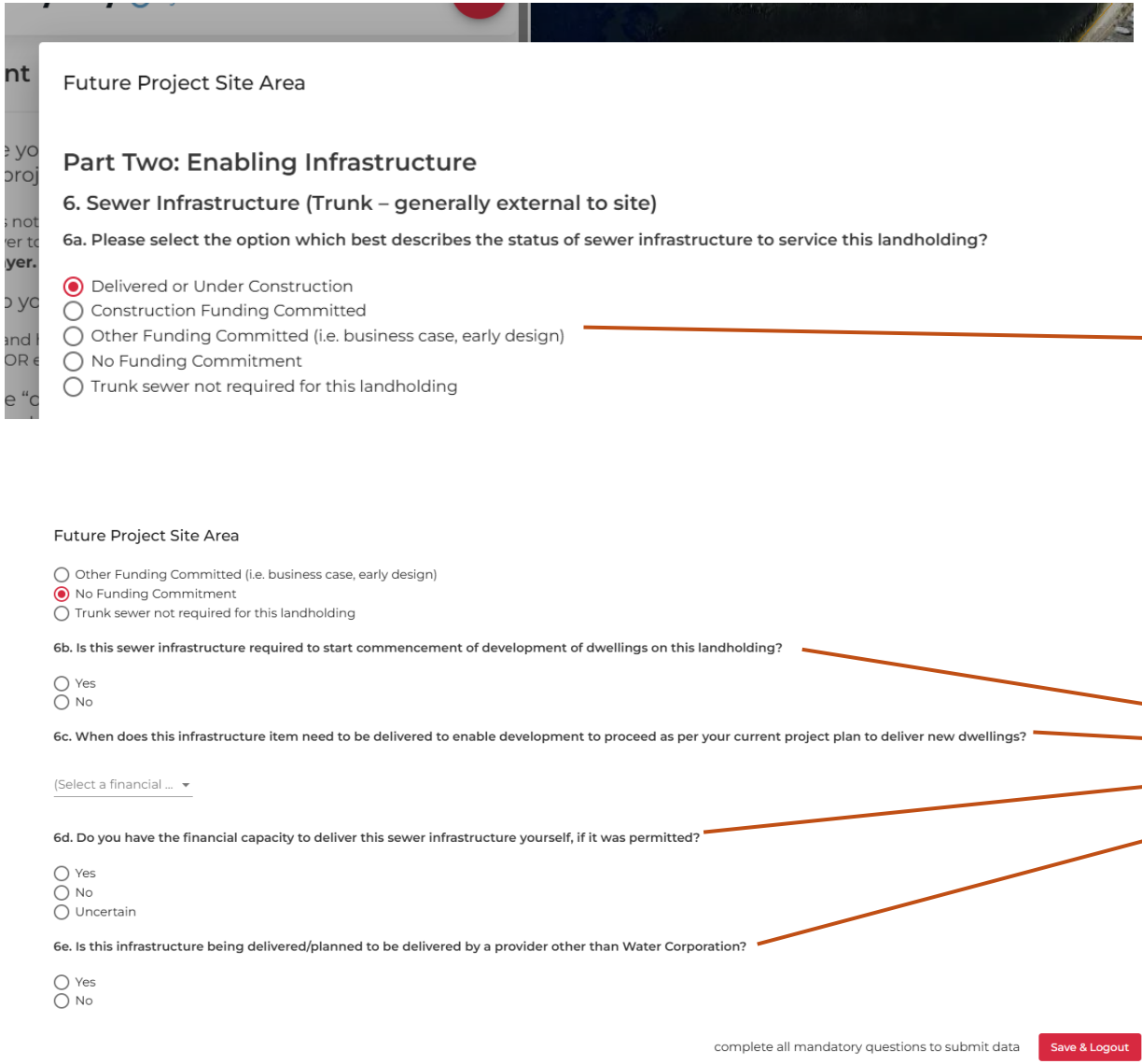
Step Six: Entering landholding information

Q4 - Please select all of the dwelling typologies anticipated for development on the landholding – for the entire life cycle of landholding/development precinct.

Q5 – This question is aimed at understanding if the landholding is financially feasible to develop new dwelling supply in the current market.

Selecting 'Yes' will advance you to the next section, while 'No' will present a sub-question which requires a Free Text answer eg 'Insufficent Pre-Sales Demand', or 'Input Construction Costs' etc.

The aggregation of answers to this feasibility question will provide UDIA wth solid data around development feasibility/viability issues holding back forward supply.



Step Seven: Enabling Infrastructure information

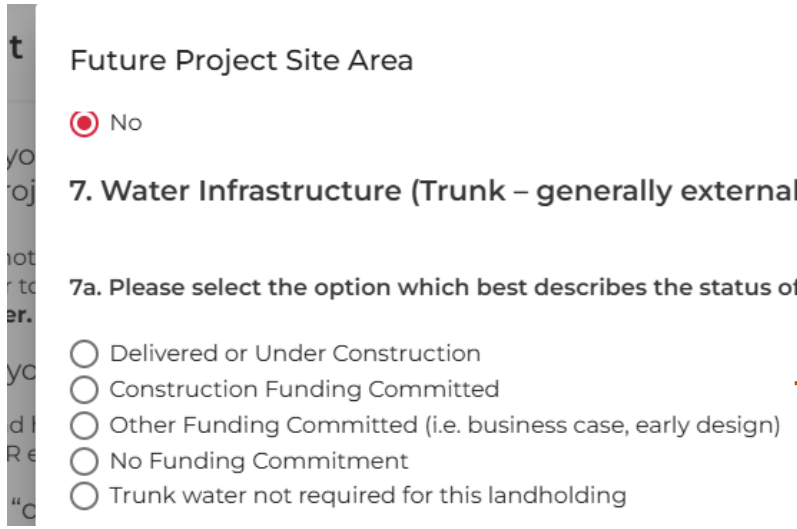
Part Two of the survey is focussed on enabling infrastructure requirements relevant to your landholding. This is core NHP survey information and each question in this section in mandatory.

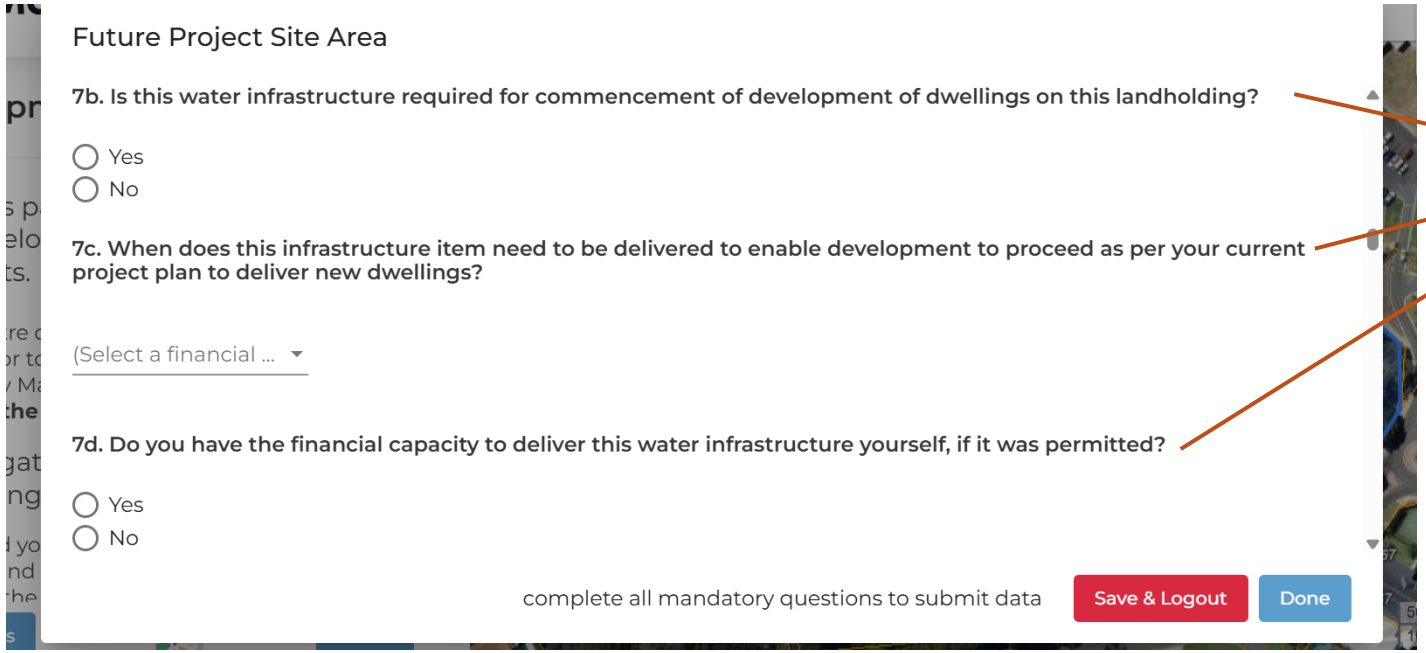
Q6 – Please select the status of **Sewer infrastructure** (defined as 'Trunk' which is generally external to the site boundary of the landholding).

Q6 – If you select 'Delivered or Under Construction' or 'Trunk sewer not required for this landholding' you will advance to Q7.

If you select 'Construction Funding Committed' or 'Other Funding Committed' or 'No Funding Commitment' you will get a set of sub-questions pop-up, which each require a response

Please note - there are slight variations in these Q6 sub-questions between each State based survey tool – designed to address the local development context





<u>Step Seven: Enabling Infrastructure cont</u>.

Q7 – Please enter the status of trunk **Water Infrastructure** required to service your landholding.

Q7 If you select 'Delivered or Under Construction' or 'Trunk sewer not required for this landholding' you will advance to the next question (Q8)

If you select 'Construction Funding Committed' or 'Other Funding Committed' or 'No Funding Commitment' you will get a set of sub-questions pop-up, which each require a response

Please note - there are slight variations in these Q7 sub-questions between each State based survey tool – designed to address the local development context

Future Project Site Area

8. Electrical/Power Infrastructure (Trunk – generally external to site)

8a. Please select the option which best describes the status of power infrastructure to service this landholding?

- ◯ Delivered or Under Construction
- ◯ Construction Funding Committed
- ◯ Other Funding Committed (i.e. business case, early design)
- ◯ No Funding Commitment
- ◯ Trunk power not required for this landholding

8b. Is this electrical/power infrastructure required for commencement of development of dwellings on this landholding?

- ◯ Yes
- ◯ No

8c. When does this infrastructure item need to be delivered to enable development to proceed as per your current project plan to deliver new dwellings?

(Select a financial ...

8d. Do you have the financial capacity to deliver this power infrastructure yourself, if it was permitted?

- ◯ Yes
- ◯ No
- ◯ Uncertain

8e. Is this infrastructure being delivered/planned to be delivered by a provider other than Western Power?

- ◯ Yes
- ◯ No

Step Seven: Enabling Infrastructure cont.

Q8 – Please enter the status of trunk **Electrical/Power Infrastructure** required to service your landholding.

Q8 - If you select 'Delivered or Under Construction' or 'Trunk power not required for this landholding' you will advance to the next question (Q9)

If you select 'Construction Funding Committed' or 'Other Funding Committed' or 'No Funding Commitment' you will get a set of sub-questions pop-up, which each require a response

Please note there are slight variations in these Q8 sub-questions between each State based survey tool – designed to address the local development context

Future Project Site Area

9a. Please select the option which best describes the status of regional road infrastructure to service this landholding?

- ◯ Delivered or Under Construction
- ◯ Construction Funding Committed
- ◯ Other Funding Committed (i.e. business case, early design)
- ◯ No Funding Commitment
- ◯ Regional Roads not required for this landholding

9b. Is this regional road infrastructure required for commencement of development of dwellings on this landholding?

- ◯ Yes
- ◯ No

9c. When does this infrastructure item need to be delivered to enable development to proceed as per your current project plan to deliver new dwellings?

(Select a financial ...

<u>Step Seven: Enabling Infrastructure cont</u>.

Q9 – Please enter the status of **Regional Road Infrastructure** required to service your landholding.

Q9 - If you select 'Delivered or Under Construction' or 'Regional Roads not required for this landholding' you will advance to the next question (Q9)

If you select 'Construction Funding Committed' or 'Other Funding Committed' or 'No Funding Commitment' you will get a set of sub-questions pop-up, which each require a response

10. High Speed Broadband Infrastructure

Please select the option which best describes the status of high-speed broadband infrastructure to service this landholding?

- (●) Delivered or Under Construction
- ( ) Construction Funding Committed
- ( ) Other Funding Committed (i.e. business case, early design)
- ( ) No Funding Commitment

Step Seven: Enabling Infrastructure cont.

Q10 – Please enter the status of **High-Speed Broadband Infrastructure** required to service your landholding.

Please Note – There are no sub-questions for Q 10.

Part Three: Planning & Environmental Approvals

11. Is the landholding/future development area currently zoned appropriately for the proposed development?

- (●) Yes
- ( ) Rezoning Underway/Pending
- ( ) No - but strategically identified
- ( ) No

12. What Planning & Development Stage is this landholding up to?

- (●) Zoning Approved
- ( ) District/regional structure plan Approved
- ( ) Local Structure Plan Approved
- ( ) Subdivision/Development Application Determined
- ( ) Awaiting Construction Commencement
- ( ) Construction Underway (including via staged delivery)

Step Eight: Planning & Environmental Approvals

Q11 – Please enter the zoning status of your landholding.

Q12 – Please enter the most advanced Planning & Development Stage which is listed.

Please Note – There are no sub-questions for Q 11 or Q12.

13. What is the status of environmental approvals on your project/landholding

- ○ Not Applicable/ Uncertain
- ○ Required but no work done to date
- ◉ All State and Federal Approvals Achieved
- ○ Required and working towards approvals (if selected, please answer the below where relevant to your project

13.a State Approval Required

- ○ Surveys/Documentation in Progress
- ○ Application Lodged and in Negotiation
- ○ Off-Set Plan Required but no offset identified
- ○ Off-Set Plan Required with likely offset identified

13.b Federal Approval Required

- ○ Surveys/Documentation in Progress
- ○ Application Lodged and in Negotiation
- ○ Off-Set Plan Required but no offset identified
- ○ Off-Set Plan Required with likely offset identified

14. Are there any other planning decisions or approvals that you are awaiting determination on that will delay the commencement of this project?

Step Eight: Planning & Environmental Approvals

Q13 – Please enter the status of **environmental approvals** for your landholding.

Q13a & 13b - If you select 'Required and working towards approvals' two sub-questions will pop up pertaining to the status of State and Federal environmental approvals. Please select the most relevant option for both 13a and 13b.

Q14 – This question allows free text entries to indicate what other planning decisions or approvals that are not listed in the survey which may delay the commencement of the project.

This a mandatory question, so if there no other planning decisions or approvals required, please enter 'No' or 'N/A'

15. What is the status of Development Contributions/Local Infrastructure Contributions?

- (●) Pre-Lodgement
- ( ) Lodged/Awaiting determination
- ( ) Approved
- ( ) Not applicable/uncertain

15a. When was the last formal review of the Developer Contributions Plan advertised?

_____

15b. How long do you anticipate these issues will take to collectively resolve?

- ( ) <1 month
- ( ) Up to 3 months
- ( ) Up to 6 months
- ( ) Up to 12 months
- ( ) More than 12 months
- ( ) Not applicable/uncertain

16. What is the status of Aboriginal Cultural Heritage Consents?

- ( ) Pre-Lodgement
- ( ) Lodged/Awaiting determination
- ( ) Approved
- ( ) Not applicable/uncertain

Step Eight: Planning & Environmental Approvals

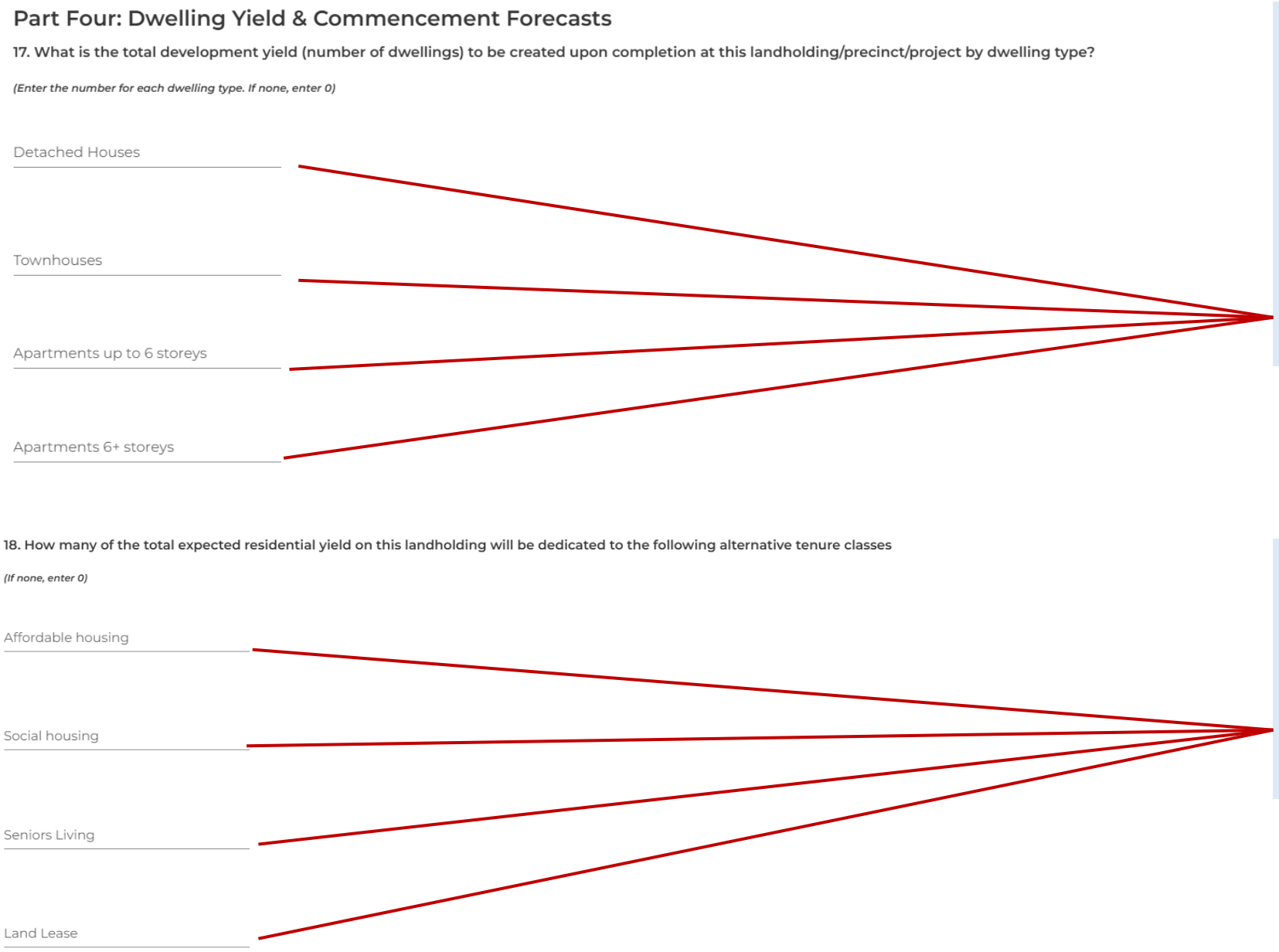
Q15 – Please select the most accurate status of any **development contributions/Local Infrastructure Contributions** which are relevant to the landholding.

Q15a – This is a mandatory question, but if unknown just enter N/A.

Q15b – Please specify the anticipated time frame for resolution of the development contributions due.

If uncertain please select 'Not applicable/uncertain'.

Q16 – Please select the most relevant status of **Aboriginal Cultural Heritage Consents** relevant for the landholding.



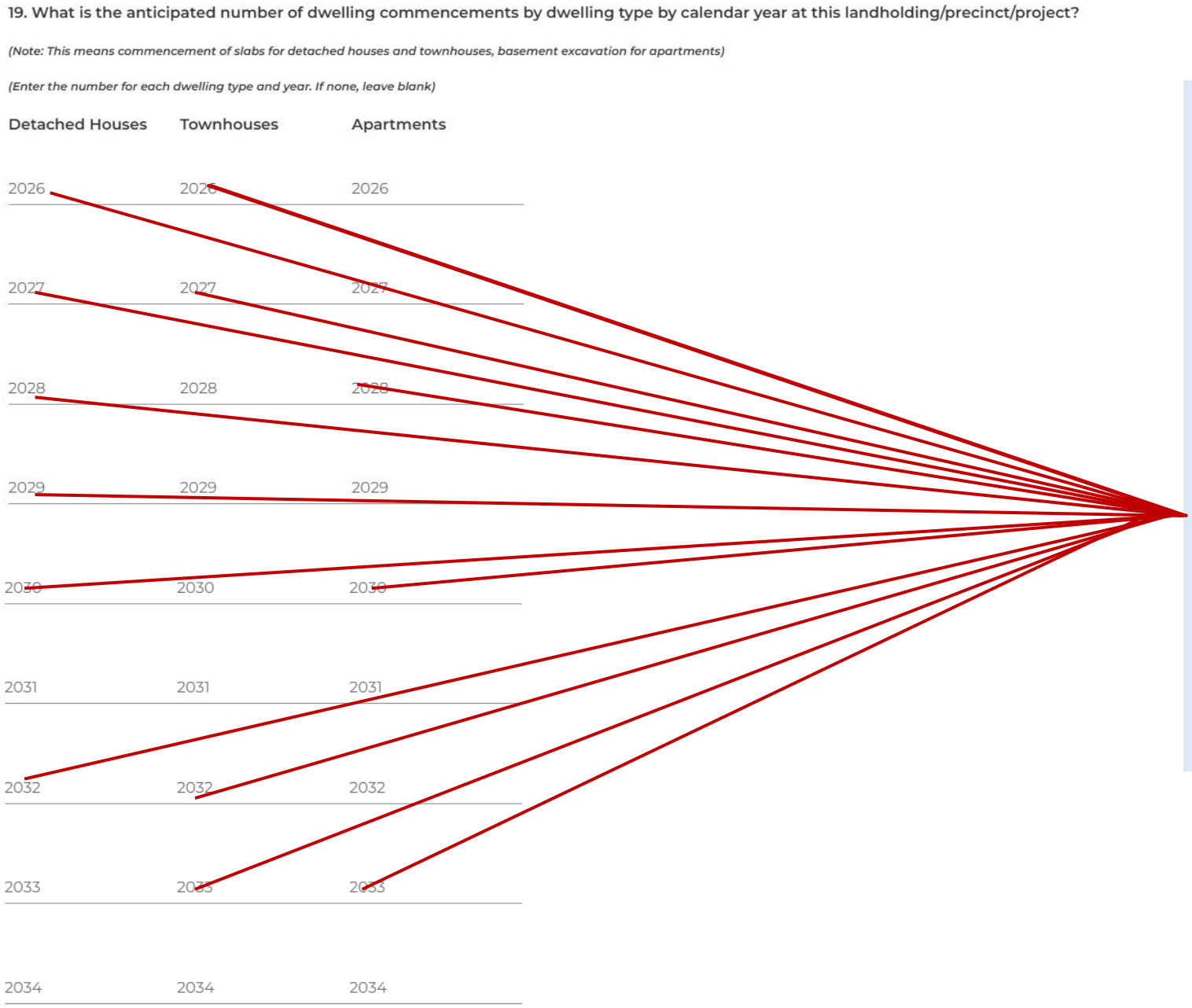
Step Nine: Dwelling Yields & Commencement Forecasts

Q17 – This question relates to the total capacity/development yield anticipated for the holding. Please enter a number for each dwelling type.

Please Note – a total yield number is required for each dwelling type. If none enter '0'.

Q18 – This question relates to the total dwelling yield apportioned to the listed 'alternative' tenure types.

Please Note – a total yield number is required for each dwelling type. If none enter '0'.



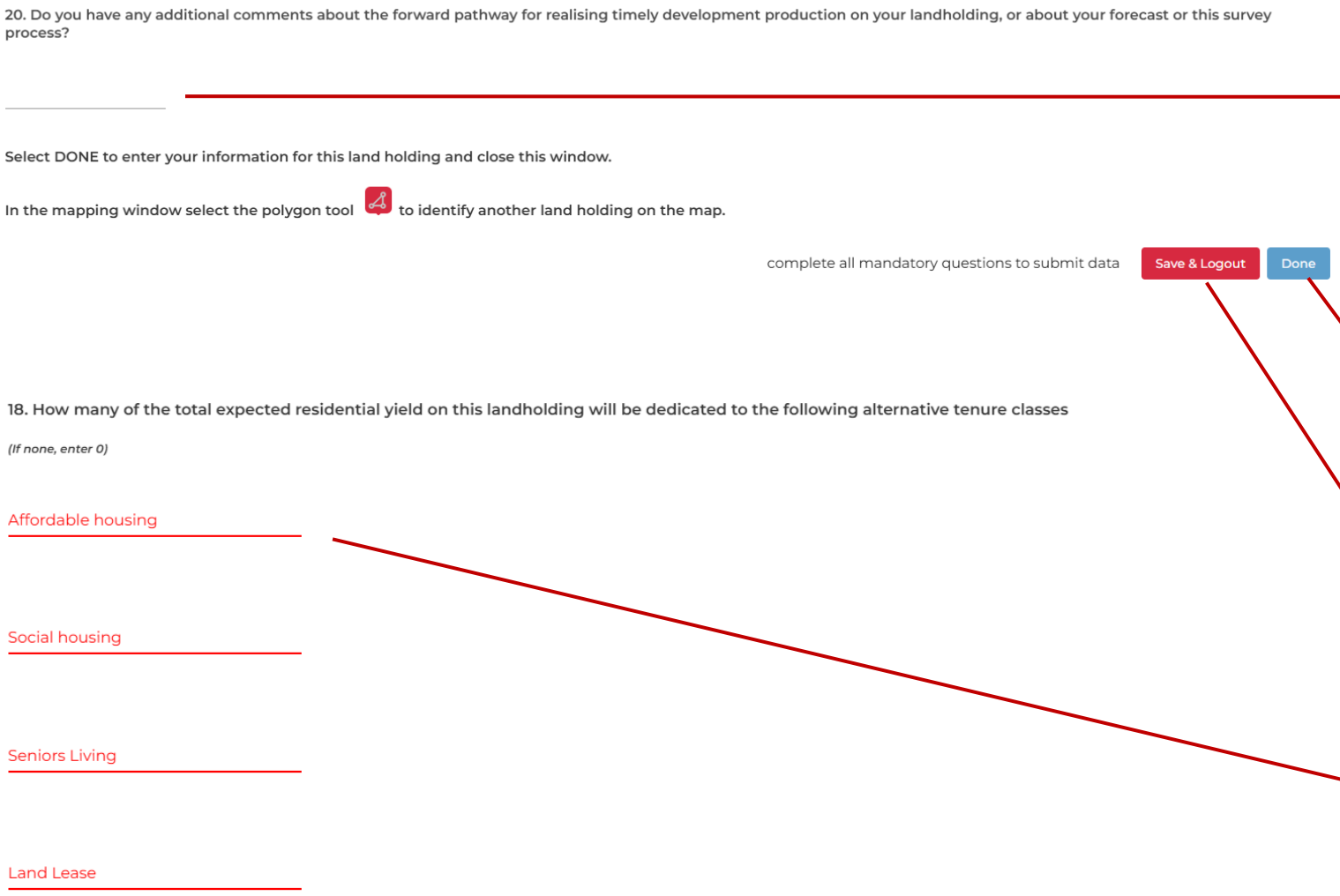
Step Nine: Dwelling Yields & Commencement Forecasts

Q19 – This question relates to the annual number of dwelling commencements expected on the landholding, by dwelling type.

By 'commencement' this survey means pouring of slabs for detached houses & townhouses (or commencement of on-site dwelling construction if non slab construction method being used) or basement excavation for apartments.

Please enter the anticipated commencement volumes by dwelling type for as many of the forward ten years as possible.

Please Note - This question is not mandatory (but it is very important) so if the year-on-year commencement volumes are unknown or no commencements are anticipated for a particular year of dwelling type, please just leave blank.



Step Ten: Additional comments and completion of landholding specific survey questions

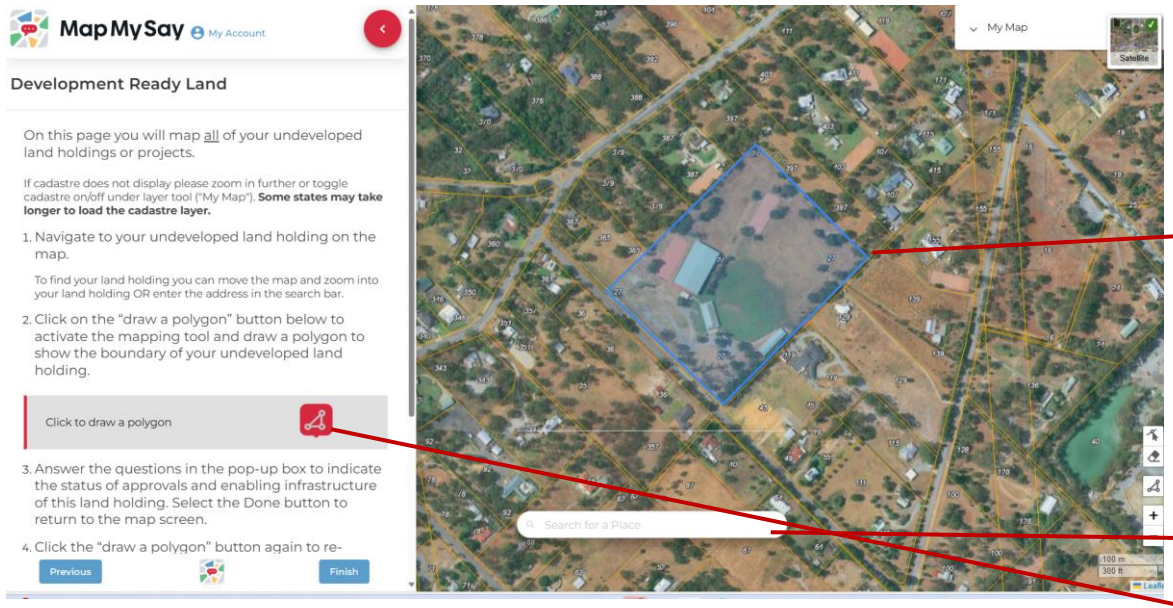
Q 20 – This final question allows any final comments to be submitted about the forward pathway for development delivery on the subject landholding, or to provide comments about the provided forecast of dwellings yields, or for any feedback about the survey.

It is a free text field and is mandatory, but if no further comments are desired just enter ‘N/A’.

The final step is to press the ‘Done’ button, which will take you back to the Stage Three mapping window, for you to re-select the polygon tool to identify another land holding to map and answer a new set of survey questions about.

If you aren’t quite ready to complete the survey for any particular landholding press the ‘Save & Logout’ button and you can return to your partially completed survey at a later date.

Please note - If there are any mandatory questions which require answers they will be highlighted in red for you to fill-in.



Step Eleven: Adding a new polygon

Once you have clicked the 'Done' button on the previous screen (and there are no mandatory questions which are not filled-in) you will be returned to the mapping window, centred on the landholding polygon you have just completed the survey for.

This mapping window is active so you can manoeuvre the interactive map to your next land holding, or enter a street address into the mapping window search bar.

When you have located the next landholding click on the Polygon creator button and repeat the survey taking process from Step 5.

Please Note – if you are wishing to add landholdings that are located in a different State or Territory you will need to exit the Survey tool and commence a new survey entry starting from Step One and select the 'Sign up – first time use' option in the registration process in Step Two.

UDIA NHP Developer Survey: Step by Step How-To Guide

ctivate the mapping tool and draw a polygon to
how the boundary of your undeveloped land
olding.

Click to draw a polygon

nswer the questions in the pop-up box to indicate
he status of approvals and enabling infrastructure
f this land holding. Select the Done button to
eturn to the map screen.

lick the “draw a polygon” button again to re-
ctivate the mapping tool and indicate another
and holding on the map and answer the associated
uestions.

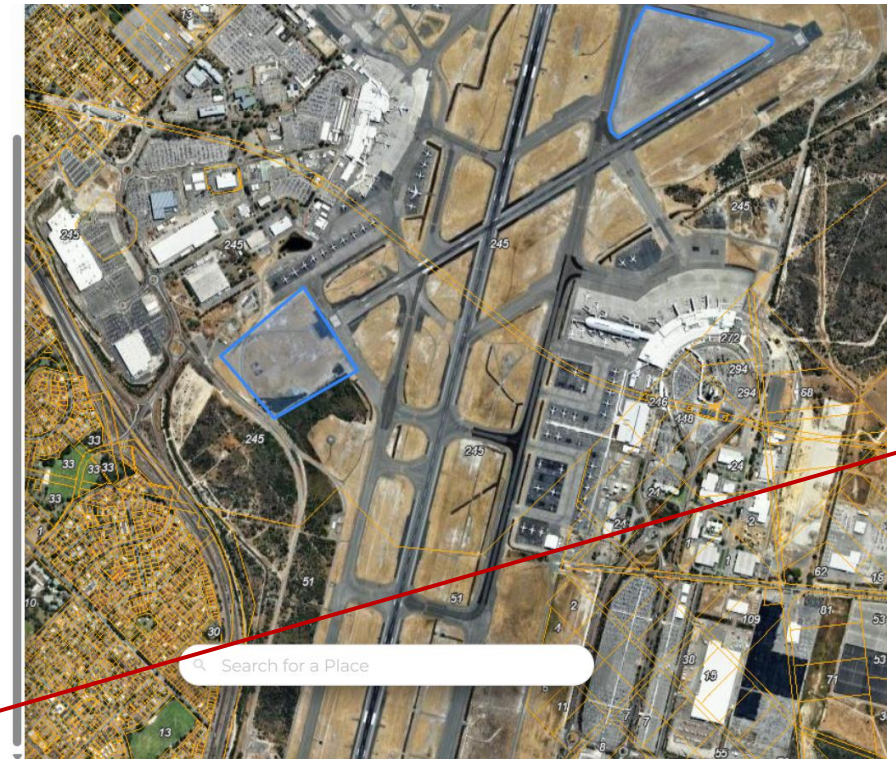
epeat these steps for each additional land holding.

nce you have mapped and entered information
or all of your land holdings select the FINISH
utton.

How to draw a polygon

Previous

Finish



Step Twelve: Completing & submitting the NHP Survey

Once you have finished adding polygons and completed the survey questions for the final landholding you are ready to submit your survey data to UDIA.

Click on the ‘Finish’ button

Thank you for your participation in the National Housing Pipeline® Survey.

Please contact the Project Lead Toby Adams with any questions or queries you have about the survey and the forward use of the collected survey data.
E: tadams@udiawa.com.au
M: 0447 132 608

Return to homepage

This final window will appear and signifies the successful completion of the NHP survey.

You can return to the NHP Survey Homepage by clicking on the ‘Return to homepage’ button, or alternatively close your browser window.

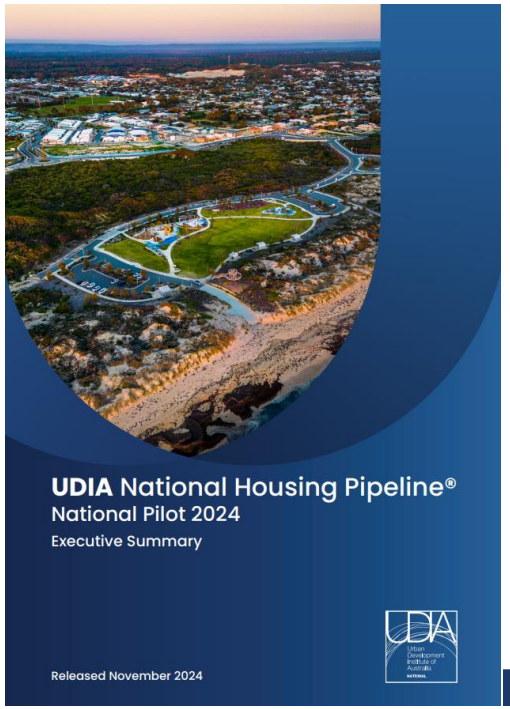
Thank you for your support of the UDIA NHP program and please don’t hesitate to contact NHP Project Lead, Toby Adams tadams@udia.com.au with any survey queries or problems you encounter along the way.

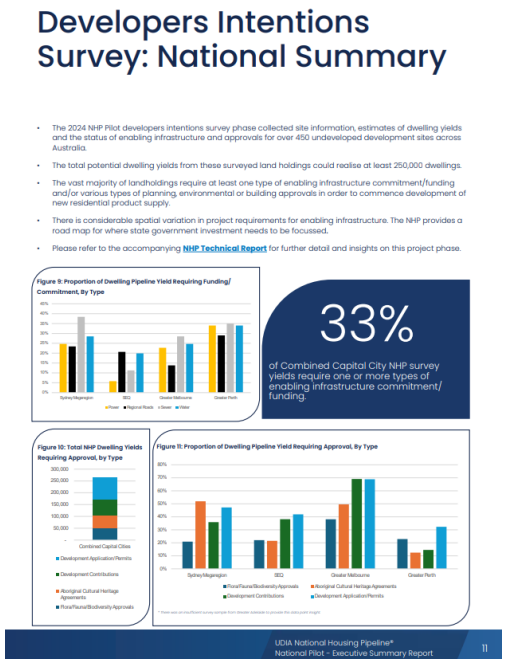
Urban Development Institute of Australia NATIONAL

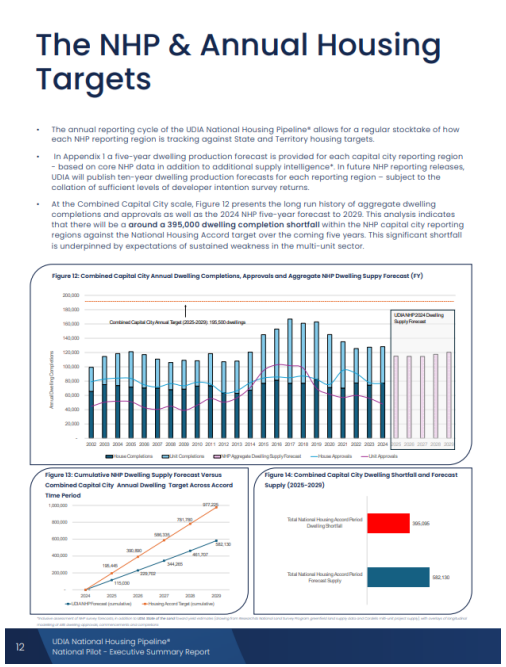
AUDRC Australian Urban Design Research Centre

THE UNIVERSITY OF WESTERN AUSTRALIA

UDIA NHP Developer Survey Data – end reporting







Conclusion

The UDIA NHP Developer Intentions survey data is a key component of the annual collection of residential development and forward supply data undertaken through the UDIA National Housing Pipeline® program.

The project scale development site intelligence provided by property developers through the NHP survey is a critical data input, and the aggregated data provides the basis for core NHP end-reporting - as featured on the UDIA National website: UDIA National Housing Pipeline® (NHP) | UDIA National.

Thank you for your support of the UDIA NHP program and please don't hesitate to contact NHP Project Lead, Toby Adams tadams@udia.com.au with any survey queries or problems you encounter along the way.

UDIA National
12/120 Edward St,
Brisbane City
QLD 4000

T 02 4415 9170
E udia@udia.com.au
www.udia.com.au

UDIA National Housing Pipeline Project Lead:
Toby Adams
tadams@udiawa.com.au
0447 132 608