



# SOCIO ECONOMIC IMPACT ASSESSMENT

29-33 Market Street, Merimbula

Prepared for Merimbula Central  
February 2021



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#### Urbis staff responsible for this report were:

Director	Princess Ventura
Senior Consultant	Ryan Condon
Research Analyst	Declan Foley
Project code	P0030730
Report number	RP1

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# THE SOCIO-ECONOMIC IMPACT OF THE PROPOSAL FOR 29-33 MARKET STREET, MERIMBULA

Urbis has been commissioned by Merimbula Central to prepare a socio-economic impact assessment (SIA) of the proposed development for 29-33 Market Street, Merimbula (Subject Site).

The purpose of this SIA is to assess the potential effects of the proposed development on the local and Bega Valley Shire LGA economy and community, and to demonstrate to Bega Valley Shire Council (Council) the economic and strategic merit of the proposed development. This report directly addresses key considerations raised by Council in this regard.

Merimbula Central's proposed development for 29-33 Market Street, Merimbula, should be supported by Council, as:

- 1 The local **construction** industry has the capacity to support the proposed development, and will benefit from the jobs and economic activity generated
- 2 Operation of the proposed ground floor retail will support **71 jobs on site** and provide a **boost to the local economy**
- 3 The proposed development will have an overall positive **impact on businesses in the immediate area**
- 4 The proposed development will provide **housing to meet the current and future housing needs** of Merimbula residents, including supporting work-from-home knowledge workers
- 5 By locating new dwellings in the Merimbula town centre, the proposed development facilitates resident **access to transport and community infrastructure**
- 6 The performance of **Merimbula accommodation providers** will not be significantly impacted by the proposed apartments
- 7 The proposed development supports the much-needed **renewal of the Merimbula town centre** as a key commercial and tourism centre in the region
- 8 The proposed development will **improve the retail offer** for local residents and tourists

# PROPOSED DEVELOPMENT FOR 29-33 MARKET STREET

The Subject Site at 29-33 Market Street, Merimbula is a substantial single-ownership land holding of 4,014 sq.m in a prime location in the Merimbula town centre.

Merimbula Central has proposed a 5-storey mixed use development for the site that would consist of 52 apartments and 1,190 sq.m of retail floorspace. It is a bold vision that will be the foundation of urban renewal and redevelopment within the Merimbula town centre and support the continued growth of the Bega Valley Shire LGA.

## CONCEPT PROPOSAL FOR THE SUBJECT SITE



52 apartments with large setbacks on the upper floors



1,190 sq.m of retail floorspace on the ground floor



Improved pedestrian laneways and public domain



Source: Squillace Architects

# 01

## SUPPORTING THE LOCAL CONSTRUCTION INDUSTRY

The construction of the proposed development over two years would generate:

- ☑ 43 jobs in the Bega Valley Shire LGA
- ☑ 8 indirect jobs in the Rest of NSW
- ☑ \$6.2 million GVA per annum to Bega Valley LGA
- ☑ \$1.6 million GVA per annum to the Rest of NSW

The construction of the proposed development would require capital investment that will generate significant activity in the local economy.

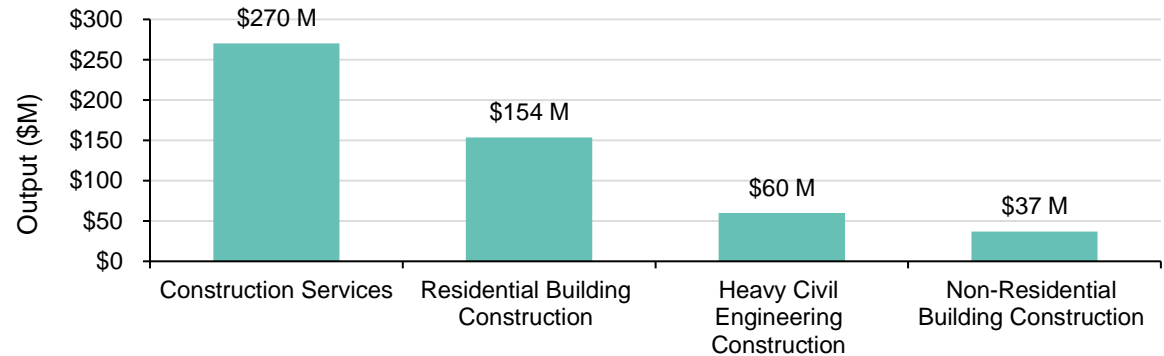
Chart 1 depicts the output of the Bega Valley Shire LGA construction industry, totalling \$521 million in 2019. This local construction industry is therefore expected to have the capacity to deliver the proposed development, which has an estimated construction value of \$21 million. The project would also help to address the current shortage of 52 construction jobs in the LGA in comparison to resident construction workers, as seen in Table 1.

Using the REMPLAN model, Table 2 shows the potential jobs and gross value added (GVA) to the local and NSW economy generated by the construction of the proposed development. This is based on an indicative construction cost of \$21 million (supplied by client) and an estimated 2-year construction timeframe from 2022.

The construction of the proposed development would support 21 direct jobs and 22 indirect jobs in the Bega Valley LGA, and a further 8 indirect jobs in the rest of NSW. **As such the local economy will retain around 85% of jobs generated by the construction of the proposed development.** Construction will also generate \$6.2 million GVA per annum for the local economy and \$1.6 million GVA per annum for the rest of NSW.

**BEGA VALLEY LGA – CONSTRUCTION INDUSTRY PERFORMANCE 2019**

CHART 1



Source: ABS; REMPLAN Economy

**CONSTRUCTION JOBS, 2019** TABLE 1

	Jobs (No.)
<b>Bega Valley LGA</b>	
Construction Jobs	1,048
Resident Construction Workers	1,100
Excess (+) / Shortage (-)	- 52

Source: ABS; REMPLAN Economy

**CONSTRUCTION PHASE BENEFITS** TABLE 2

	Bega Valley Shire LGA	Rest of NSW
<b>Employment</b>		
Direct Jobs	21	0
Indirect Jobs	22	8
<b>Total Jobs</b>	<b>43</b>	<b>8</b>
<b>Gross Value Added (GVA) per annum (\$M)</b>		
Direct GVA	\$3.1M	\$0M
Indirect GVA	\$3.1M	\$1.6M
<b>Total GVA</b>	<b>\$6.2M</b>	<b>\$1.6M</b>

Source: Merimbula Central, REMPLAN Economy

# 02 SUPPORTING 73 ONGOING JOBS ON SITE AND BOOSTING THE LOCAL ECONOMY

## Operation of the proposed retail will generate:

- ☑ 73 jobs on site (140% more jobs than currently)
- ☑ 10 indirect jobs in the Bega Valley Shire LGA and 6 indirect jobs in the Rest of NSW
- ☑ \$7.1 million GVA per annum to Bega Valley LGA
- ☑ \$1.1 million GVA per annum to the Rest of NSW
- ☑ Jobs for local residents currently travelling outside the LGA for work

The operation of the 1,318 sq.m proposed retail is expected to accommodate **73 jobs on an ongoing basis**. This is estimated by applying an average workspace ratio of 18 sq.m per job, derived from the *Perth Land Use Category (PLUC)* database.

These new jobs on site compare to 42 jobs currently on site (as supplied by Merimbula Central), therefore representing a **140% uplift in jobs at the subject site**. To note, some existing tenants have indicated their interest in taking up premises in a redeveloped retail space, thus potentially making up a portion of the new jobs.

As shown in Table 3, The 73 operational jobs on site could support up to **10 indirect supply chain jobs in the Bega Valley LGA**, and a further 6 in the rest of NSW, based on REMPLAN analysis. It also has the potential to deliver an additional \$2.9 million Gross Value Added (GVA) per annum for the local economy and \$0.5 million per annum for the rest of NSW.

Chart 2 shows the job containment of the top five industries by resident workers in the LGA. The ongoing operation of the proposed development would help to provide additional jobs to local residents who currently have to travel outside the LGA for work.

## ONGOING BENEFITS

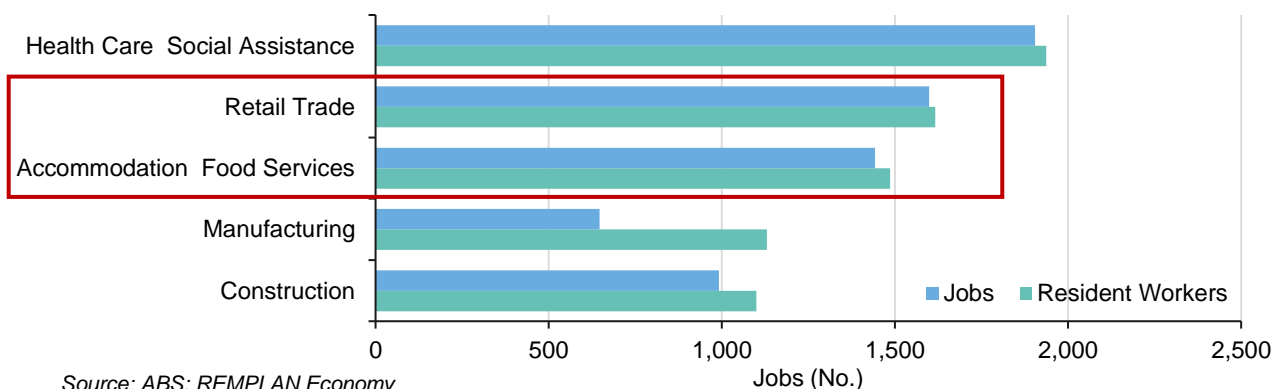
TABLE 3

	Bega Valley Shire LGA	Rest of NSW
<b>Employment</b>		
Jobs Within Proposed 1,318 sq.m Retail GFA (@ 18 sq.m / job)	73	
Indirect Jobs Supported	10	6
<b>Total Job Uplift</b>	<b>83</b>	<b>6</b>
<b>Gross Value Added (GVA) per annum (\$M)</b>		
Direct GVA	\$5.4M	\$0M
Indirect GVA	\$1.7M	\$1.1M
<b>Total GVA</b>	<b>\$7.1M</b>	<b>\$1.1M</b>

Source: Merimbula Central, REMPLAN Economy, Urbis

## JOB CONTAINMENT – BEGA VALLEY SHIRE LGA, 2019

CHART 2



# 03 IMPACT ON BUSINESSES IN THE IMMEDIATE AREA

## Impacts on surrounding businesses include:

- ☑ Additional retail spending to support local retailers
- ☑ Only one business operating outside noise restricted hours, with low risk of receiving complaints (24/7 gym)

The proposed 52 new apartments at the subject site are estimated to accommodate around 114 new residents (based on average household size of 2.2 for new apartment dwellings). Retail spending by these new residents will support new and existing businesses in the area surrounding the site.

It may seem like the influx of residents also has the potential to negatively impact nearby businesses through noise restrictions. However, this is not the case for the proposed development. Noise restrictions are generally in place around residential premises from 12am to 7am on Friday and Saturday and 10pm to 7am other days.

Map 1 depicts the uses surrounding the proposed development, with the types of businesses within ~100m listed in Table 4. Merimbula Health and Fitness is the only business to operate within noise restricted hours which, as a gym, has a low risk of receiving complaints. All other businesses operate outside noise restriction hours.

## POTENTIALLY IMPACTED BUSINESSES

TABLE 4

Map ref.	Business Types
A	Bottle Shop, Gym
B	Hairdresser, Banks, Real Estate, Food Catering, Apparel
C	Hotels and Motels
D	Bank, Cafes, Restaurants, Apparel, Services
E	Cafes, Real Estate, Apparel, Restaurant
F	Fast Food, Shopping Centre

## SURROUNDING PROPERTY USES

MAP 1



# 04 NEW HOUSING TO MEET THE NEEDS OF MERIMBULA RESIDENTS

## HOUSING DEMAND

The Bega Valley Shire *Residential Land Strategy 2036* investigates housing capacity of each area in the LGA to 2036. As illustrated in Table 5, **Merimbula currently has does not have an adequate supply to meet the future demand for housing.** Insights from local real estate agents indicate there is currently strong market demand for both 2- and 3-bedroom apartments in Merimbula town centre. The Strategy highlights a particular shortage of residential land supply around the Merimbula town centre.

The proposed development will help address the housing capacity shortage in the Merimbula town centre with the urban renewal proposal earmarked to deliver 52 new apartments on land not previously permitting housing.

## HOUSING DIVERSITY

Another principle of the *Residential Land Strategy 2036* is to support housing diversity, particularly around existing town centres through adjusting current planning controls. The Strategy seeks to deliver housing to meet the changing demographics of Merimbula.

Table 6 shows the growth of **lone person and couple households** in Merimbula, accounting for 85% of new households. This group of residents, particularly seniors, generally prefer smaller, low-maintenance dwellings that are close to local amenity. Table 7 shows how the proposed development would help increase the share of apartments in the Merimbula – Tura Beach SA2 from 7% to 8%, aligning with Council objectives.

In line with a national work-from-home trend, also identified by Council as a growing need of LGA residents, the proposed development will comprise high quality apartments that would allow residents to work from home.

### The proposed development will:

- ☑ Address part of Merimbula's housing capacity gap
- ☑ Improve housing diversity with apartment dwellings
- ☑ Facilitate resident work-from-home needs

HOUSING CAPACITY, 2019-36		TABLE 5
		Merimbula – Millingandi
Dwelling Demand Based on Population Forecast		265
Current Housing Capacity		182
<b>Current Gap</b>		<b>-83</b>
Additional Dwellings From Proposed Development		52
<b>Adjusted Gap with Proposed Development</b>		<b>-31</b>

Source: *Residential Land Strategy 20236, Urbis*

HOUSEHOLD COMPOSITION, 2011-16					TABLE 6
	2011	2016	Change (No.)	Share of Change	
Lone Person	1,154	1,366	+212	63%	
Couple	1,556	1,630	+74	22%	
Family	1,209	1,247	+38	11%	
Group	91	104	+13	4%	
<b>Total</b>	<b>4,010</b>	<b>4,347</b>	<b>+337</b>		

Source: ABS, Urbis

DWELLING STRUCTURE					TABLE 7
	Separate houses	Townhouse	Apartments	Other	Total
Merimbula – Tura Beach SA2	3,015	885	293	101	4,294
	70%	21%	7%	2%	
Merimbula – Tura Beach SA2 + Proposed 52 Apartments	3,015	885	345	101	4,346
	69%	20%	8%	2%	100%

Source: ABS, Urbis

# 05

## FACILITATING RESIDENT ACCESS TO TRANSPORT AND COMMUNITY INFRASTRUCTURE

### Proposed apartments at the subject site will:

- ☑ Provide housing close to existing resident amenity and infrastructure in Merimbula town centre
- ☑ Reduce demand for additional town centres
- ☑ Reduce public costs of extending infrastructure to greenfield housing sites

Map 2 illustrates the location of the proposed development within the Merimbula town centre. It shows that new residents of the proposed development will have close access (within 800 metres) to existing **retail, recreation, health facilities, bus network and community infrastructure** in the town centre.

A key principle of the *Residential Land Strategy 2036* is to **reinforce the role of the existing town centres and promote access to shops and services**. Recent new housing in the LGA mostly comprises low-density housing in greenfield areas, which increases demand for new town centres. The proposed medium density urban renewal project would relieve this pressure and reinforces the role of the existing town centre.

Another principle that the proposed development supports in the *Residential Land Strategy 2036* is **promoting the efficient use and provision of infrastructure**. To deliver new greenfield housing, Council incurs high costs of extending transport infrastructure and town services to new areas. The proposed apartments will help to reduce these high costs as it is already well serviced with road, utilities, transport routes and community infrastructure.

### MERIMBULA TOWN CENTRE AMENITY AND INFRASTRUCTURE

### MAP 2



# 06 IMPACT ON MERIMBULA ACCOMMODATION PROVIDERS

## The impact of 52 proposed apartments includes:

- ☑ Around 13 potential new short-term rental units
- ☑ A minor (-0.5 percentage points) impact on average occupancy in Merimbula
- ☑ An impact mitigated by expected 1.3% average annual growth in visitation over next five years

Tourism is a significant part of the economy in Merimbula, as a south coast town. Tourism Research Australia estimates that Merimbula had an average of 1,647 guests per night in the last five years. As shown in Table 8, these guests are estimated to generate significant demand for **511 short term accommodation rentals each night**, based on average guests per rental.

The proposed development is expected to take a share of these guests as it is expected **around 13 of the 52 proposed apartments could be used for short term accommodation purposes**. This is based on the proportion of dwellings in Merimbula that are currently available as private accommodation rentals (25.4%).

Table 8 shows the estimated impact of the additional 13 potential private rental apartments on other short term accommodation providers in Merimbula. Currently there is a supply of 390 private rentals and 753 hotel rooms. Based on this combined supply, demand per night reflects an occupancy rate of 44.7%. The addition of 13 private rentals to overall supply represents a potential **minimal negative impact on occupancy of -0.5 percentage points**.

Tourism Research Australia estimates that visitors in Merimbula will grow at an average annual rate of 1.3% per annum in the next five years. This indicates that **the impact of the proposed development on occupancy will be absorbed by additional demand**.

## IMPACT ON MERIMBULA SHORT TERM ACCOMMODATION

TABLE 8

### Visitors (5 Year Average, 2015-2020)

Merimbula Average Guests Per Night (paid accommodation only)	1,647
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### Current Short Term Accommodation Demand

Guests Per Private Rentals (Airbnb, etc.)	5.8
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Guests Per Hotel Room (hotels, motels, serviced apartments, etc.)	1.9
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Guests Per Short Term Accommodation	3.2
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<b>Total Demand for Short Term Accommodation (A)</b>	<b>511</b>
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### Current Short Term Accommodation Supply

Private Rentals Supply	390
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Hotel Room Supply	753
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<b>Total Supply for Short Term Accommodation (B)</b>	<b>1,143</b>
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<b>Current Occupancy (C) = (A) divided by (B)</b>	<b>44.7%</b>
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### Impact of Proposed Development

Proposed Apartments	52
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Share of Apartments used as Private Rentals	25.4%
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Additional Short Term Accommodation Supply	13
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<b>Adjusted Total Supply for Short Term Accommodation (D)</b>	<b>1,156</b>
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<b>Adjusted Occupancy (E) = (A) divided by (D)</b>	<b>44.2%</b>
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<b>Impact = (C) minus (E)</b>	<b>-0.5%</b>
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Source: ABS; TRA; Airbnb; Vrbo; Stayz; AM:PM

# 07 RENEWAL OF MERIMBULA AS A KEY COMMERCIAL AND TOURISM CENTRE OF THE REGION

The redevelopment and renewal of Merimbula is essential to boosting business investment and increasing tourist visitation. In Council's response to the proposed development in the *Draft Commercial Land Strategy Submission*, it noted that the rate of redevelopment and upgrade of the LGA's town centres is slow, with current height restrictions limiting developer interest.

A key recommendation of the *Commercial Land Strategy 2040* is to stimulate redevelopment in Merimbula town centre by investigating incentives for shop top housing, including the consideration of increasing maximum height for sites with an area greater than 2,000 sq.m.

The subject site, at **4,014 sq.m**, is a unique site in the Merimbula town centre meeting this size requirement. This size allows for **large setbacks** that will minimise the impact of proposed upper-level apartments on the streetscape and surrounding sites. Further, the site is under **single ownership** and has **B2 Local Centre zoning** making it favourable for increased density.

Another recommendation of the *Commercial Land Strategy 2040* is to improve public space in commercial areas to stimulate additional visitation and business investment. The proposed development, as seen in the images in Figure 1, will greatly improve the current streetscape with a **redeveloped ground floor retail offer** and **upgraded pedestrian laneways**. These improvements provide opportunities for public use, boutique shopping, outdoor dining, street seating and night-time activation that will help stimulate investment and visitation within the town centre.

Key attributes making the site a unique opportunity for renewal of the town centre:

- ☑ Rare site larger than 2,000 sq.m in the town centre
- ☑ Under single ownership with B2 Zoning
- ☑ Potential to improve public space in commercial areas

## IMAGES OF EXISTING VS PROPOSED SUBJECT SITE BUILT FORM

FIGURE 1



**Existing streetscape** along Market Street looking west including outdated buildings, awnings and signage.



**Proposed development** along Market Street looking south. Large setbacks at higher levels integrate well with existing adjacent buildings and streetscape.



**Existing enclosed pedestrian laneway.** Poor visibility of existing tenants, limited sunlight and natural features, and dated landscaping is unlikely to attract visitors.



**Proposed development** along Market Street looking west. Improved streetscape with updated awnings, visible shopfronts and improved footpath. Pedestrian laneway widening and becoming open air allows for activation of laneway shopfronts, including seating. Improved natural features such as gardens and trees create a more lively and attractive environment for use by residents and visitors.

# 08

## AN IMPROVED RETAIL OFFER FOR LOCAL RESIDENTS AND VISITING TOURISTS

### The improved retail offer will provide:

- ☑ Fine grain retail with 60 sq.m – 120 sq.m tenancies
- ☑ Range of outdoor spaces for tenants
- ☑ Motivation for other sites to undergo redevelopment

The existing commercial and retail tenancies at the subject site are dated and in need of redevelopment, as evidenced by reports from the current landowner of:

- A **vacancy rate of 11.4%** across current tenancies
- **Difficulty in attracting tenants** due to the tired condition of the town centre
- Strong interest from existing tenants to take up premises following redevelopment of the subject site.

A key principle of the *Commercial Land Strategy 2040* that guides town centre redevelopment is the provision of fine grain retail in order to encourage business diversity. The architects of the proposed development have indicated the intention for tenancies in the proposed development to be fine-grain boutique retail. It is expected that there will be around 15 tenancies with sizes mostly ranging from 60 sq.m – 120 sq.m, although this is subject to change with market conditions.

The *Strategy* also expresses the need for the promotion of existing laneways and arcades. The upgraded laneways of the proposed development will include more tenancies with outdoor spaces available for new and existing retail tenants.

Urbis' experience of town centre renewal suggests that redevelopment of part of the town centre will also drive redevelopment of other developments as the competitiveness and quality of retail improves.

### EXISTING VS PROPOSED RETAIL OFFER



Existing subject site retail tenancies on Market Street facing west. Frontage close to kerb limits potential for outdoor use.



Precedent image of fine grain boutique retail for the proposed development. Use of outdoor space allows for an attractive shopfront.



Existing outdoor retail frontage at rear of subject site, facing east from car park. Large enclosed tenancies not opening out to the street with limited space between building and the street.



Precedent image of potential outdoor dining uses of the improved retail offer at the subject site. Outdoor seating provisions also allow for better utilisation of indoor space.

