



COST BENEFIT ANALYSIS AND ECONOMIC IMPACT ASSESSMENT OF THE HUON RIVER FORESHORE SHARED PATHWAY

FINAL REPORT
MAY 2020

Prepared for
Huon Valley Council

Meeting: 26.08.2020
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Independent
insight.



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EXECUTIVE SUMMARY

Huon Valley Council has been considering the development of a shared pathway along the Huon River between Huonville and Franklin for some time. The Huon River is one of the key natural assets of the Huon Valley. The engagement, enjoyment and interaction with the river is however hampered for the wider community by the limited opportunities for access. The shared pathway would provide river front access for walkers, cyclists and those using mobility aids, along with additional entry points to the Huon River for kayaking and fishing opportunities.

In 2019, Council had an engineering and costing study undertaken to inform future decision making.

To potentially justify investment and funding for the pathway there is a need to demonstrate whether the proposed development generates net benefits for the community and contributes to the tourism offer and the local economy. This report provides a Cost Benefit Analysis of the social, economic and environmental costs and benefits and includes key findings of community engagement undertaken as part of the CBA.

Project context

The Huon River Foreshore Shared Pathway would start at the Huonville Foreshore, covering a distance of approximately 7.5km along the riverbank through to Franklin at the Wooden Boat Centre¹. Once completed, Council envisages that the accessible pathway would bring numerous benefits to the Huon Valley, for tourists, local residents and businesses.

Community engagement results

The Huon Valley community and visitors who participated in the project engagement activities overwhelmingly support the construction of the pathway, with 96% of survey respondents being either strongly supportive (90.7%) or supportive (5.7%) of the pathway. Further, nearly 97% of survey respondents note that they would personally use the pathway if it was constructed.

Across both the workshop and online survey platforms, community members and visitors alike actively engaged in the activities and presented many new opportunities for community and visitor utilisation of the infrastructure, and were convinced of the many benefits the pathway would provide.

Additional engagement may be required with the landowners with land abutting the Crown Land where the pathway would be constructed, particularly during the detailed design phase of the Pathway. This would aid in allaying any residual concerns about safety, privacy, and perceived impact on wildlife.

Cost benefit analysis results

The results of the cost-benefit analysis highlight that the benefits outweigh the costs, and that the project is well worth pursuing:

- The Huon River Foreshore Shared Pathway project has a net present value to the community of \$30.8 million over the thirty year analysis period.

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¹ An extended version would start at the Huonville Esplanade and end at the playground and Petty Sessions in Franklin, with a total length of 9 km, and at little to no extra cost compared to the 7.5 km option.

- The Shared Pathway has a benefit-cost ratio of 2.25 implying that for every \$1 invested, there are \$2.25 worth of benefits provided to the Huon Valley, and by extension, the Tasmanian community.
- In addition, there are considerable unquantified benefits of the project, meaning the true BCR ratio is even higher than the conservative one based on quantitative analysis.

Economic impact assessment results

The results of the economic impact assessment capture the economic impacts investment in the pathway will have on the local Huon Valley economy in terms of employment and contribution to gross regional product.

Economic stimulus is generated in two phases. The construction phase via the expenditure on labour, material and services to build the pathway, and the tourism phase. The tourism phase includes expenditure on pathway maintenance and increased visitor expenditure. When people purposefully plan a trip to the Huon Valley because of the pathway, they will visit other attractions, spend money at local accommodation providers, hospitality venues and retail stores, and may hire bicycles or kayaks, or undertake tours.

In total, which includes flow-on effects as expenditure circulates through the local economy, investment in the pathways:

- Adds \$24.4 million to the gross regional product of the Huon Valley over ten years (2020-2030)
- Supports 64 full-time equivalent jobs during construction
- Supports 54 full-time equivalent jobs per annum, by 2030, due to increased tourism expenditure and track upkeep.

Other key insights/findings

- The existing foreshore area provides very limited access to the Huon River over much of the distance. This means the areas natural values are not easily accessible for the local community or visitors. **The development of the high-quality pathway would provide river access to a broader range of the community.**
- The socio economic profile of the Huon Valley presents challenges in terms of its economic future. The Region has an ageing population, growing presence of young families, higher than average unemployment, and limited employment opportunities. **Investment in social and tourism infrastructure would address some of these issues.**
- Participation in unstructured recreational activity is growing, as is the local population. Australians are increasingly demanding infrastructure that facilitates passive recreation, as opposed to traditional recreational assets such as sportsgrounds. **Investment in tracks and trails is in line with the trend of unstructured recreation. Providing access for all abilities is also essential for any new infrastructure.**
- The Huon Valley is missing out on the tourism growth currently being enjoyed by the State of Tasmania. Although there are existing high quality attractions, the Huon Valley's market share of State visitation has been falling in recent year. **The Pathway could help reverse this trend and help the Valley to benefit from tourism growth.**
- **The Pathway strongly aligns with the goals and strategies of both Huon Valley Council and the Tasmanian Government**, as it intends to provide numerous benefits to residents, tourists, Huon Valley and Tasmania as a whole. It aims to improve community liveability, public health and wellness, attractiveness as a tourism destination and the increase the strength of the local economy.
- **Tasmania has an established profile as a destination for nature-based tourism excellence.** Iconic destinations including the 3 Capes Trail and Cradle Mountain are

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attracting high levels of domestic and international visitation. The Pathway would add another tourist destination to the visitor itinerary.

- Many regions around the State are benefiting from the growing visitor market. The Huon Valley is mainly a 'day-trip' destination. This means the Huon Valley Region is not currently attracting a proportional share of overnight visitors. **The Pathway would entice visitors to extend their stay into overnight visits.**

Recommendation

SGS Economics and Planning recommends that the Huon River Shared Pathway project is worth pursuing from a broad community benefit point of view.

Qualified assessment

SGS has relied on data on construction and maintenance costs provided by Huon Valley Council, and has not undertaken a detailed review of these estimates or checked their veracity.

1. INTRODUCTION

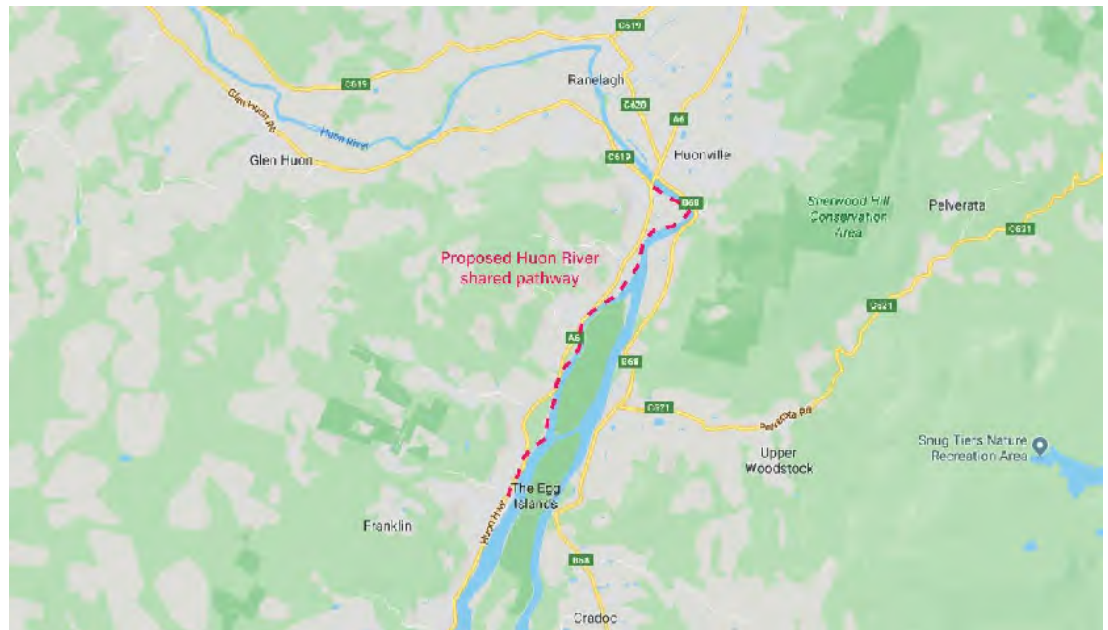
SGS Economics and Planning was commissioned by Huon Valley Council (Council) to undertake a cost-benefit analysis of developing a shared pathway along the Huon River, running from Huonville to Franklin. This report outlines the credentials of the project to the community, stakeholders, potential private investors and government, and provides a solid evidence base for Council from which to carry this project forward.

1.1 Project context

The Huon River Foreshore Shared Pathway would be a multi-use path that would accommodate walkers, cyclists and kayakers, with provisions for disability access on key sections of the route. The route for the pathway would traverse the Crown Land Foreshore Reserve along the banks of the Huon River between Huonville and Franklin.

The pathway would start at on the Huonville Foreshore, covering a distance of approximately 7.5km along the riverbank through to Franklin at the Wooden Boat Centre (as shown below). The pathway could be expanded to start at the Esplanade in Huonville and extend to the end of the foreshore of Franklin (the playground and Petty Sessions). The length would then be nearly 9 km and include toilet and barbeque facilities at both ends of the pathway.

FIGURE 1: PROPOSED HUON RIVER FORESHORE SHARED PATHWAY



Source: SGS Economics and Planning

The Huon river is one of the key icons in the Huon Valley. It provides significant natural, cultural and historic values and has played a significant role in the historic economic development of the region. To this day the spectacular beauty of the river is underutilised. The river is only accessible at limited points along the river, and the values of the river are currently best experienced from a boat or kayak.

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The pathway would enable more residents and visitors to experience the beauty of the river. If managed well, the river's iconic value could become an important drawcard for visitors.

The pathway would provide riverfront access for walkers, cyclists and those using mobility aids, along with additional entry points to the Huon River for kayaking and fishing opportunities along the way. Once completed, Council envisages that the accessible pathway would bring numerous benefits to the Huon Valley, for tourists, local residents and businesses.

This project is aimed at being both a mechanism for tourism and economic development, but also as an asset for community use and recreation. In many cases, tourism infrastructure can also be utilised by local communities to increase recreation and leisure opportunities. Huon Valley Council in particular recognises the importance of this. Council's Strategic plan states *"The challenge is providing the mix of infrastructure and facilities that ensures they are suitable for purpose and productively used. Multiple use and outcomes is a key principle when considering upgrade or new investment. For residents and visitors, the Huon Valley provides much in close proximity. Increasingly, these possibilities are recognised by the visitor market. This provides both an opportunity and a risk. There is the opportunity to attract visitors to turn a marginal business into a thriving business, or to establish a new business opportunity of community events. The risk is in not providing it to the expectations of the market..."* (Huon Valley Council, 2015).

1.2 Aim of this report

As part of stage 1 of the Pathway for Council – the technical and engineering requirements – engineers developed a concept design and costing of the shared pathway, including access points and supporting facilities and infrastructure.

This report addresses Council's next stage and involves an assessment of the economic and community benefits for the area. This report will identify the projected costs and benefits of the Huon River Foreshore Shared Pathway (hereafter referred to as the Pathway) from Huonville to Franklin, including:

- the support in the community for the project and the likely usage rates
- the community health and wellbeing benefits that would be achieved from the project
- the potential for the project to attract visitors to the area, and
- the potential economic benefits to the community including potential business activities that may develop as a direct result of the project.

1.3 Report structure

This report is structured as follows:

- Section 2 provides the strategic alignment of the Pathway with key council and state government documents, as well as some commentary on the project need from a socio economic perspective.
- Section 3 outlines the community's alignment with the Pathway, as documented through the community engagement activities undertaken throughout the project.
- Section 4 provides the Pathway's cost benefit analysis
- Section 5 provides an economic impact assessment of investment in the pathway
- Section 6 presents our analysis' findings and conclusions.

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2. STRATEGIC ALIGNMENT AND PROJECT NEED

This section documents the extent to which the Project aligns with local and state strategic directions as set out in their plans and policies.

2.1 Local Strategic Alignment

At the local government level, the strategic alignment of the proposed pathway was assessed:

- Huon Valley Council Strategic Plan
- Huon Valley Township Walking Track Study
- Huon Valley Economic Development Strategy
- Huon Valley Health and Wellbeing Strategy
- Huonville-Ranelagh master plan
- Franklin Foreshore master plan.
- Huon Valley Recreation Plan (draft)

Huon Valley Council Strategic Plan

The Huon Valley Council Strategic Plan 2015-2025 guides the delivery of governance and services that will achieve community goals and priorities. The Plan consists of an overarching vision for the Huon Valley, being “working together for a prosperous, vibrant and caring Huon Valley community” (Huon Valley Council, 2015).

The Strategic Plan is informed by eight future directions as identified in the Huon Valley 2020 Community Plan. These future directions are as follows:

- Care for our environment
- Build health and wellbeing
- Enhance recreational opportunities
- Improve transport and connections
- Create diverse education opportunities for all
- Develop prosperity
- Expanded community engagement and involvement
- Celebrating our arts, heritage and culture (Huon Valley Council, 2015).

All of the eight future directions align strongly with the Pathway. If built, the Pathway would become a key piece of community infrastructure that would enable expanded community **engagement and involvement**, caring for the **environment** through passive education (thus also creating diverse **education** opportunities for all). It would also allow for greater **health and wellbeing** for those community members who used it for **recreational** purposes, improve **transport connections** between Huonville and Franklin, increase the **prosperity** of the town by providing a tourism asset, and through signage and interpretation create opportunities to celebrate **heritage and culture**.

Council’s strategic objectives provide medium-term goals that facilitate their vision, and influencing characteristics provide short-term goals. Council strategies are used to achieve the influencing characteristics. The table below provides a summary of Council objectives relevant to the Pathway.

TABLE 1: ALIGNMENT OF THE PATHWAY WITH COUNCIL'S STRATEGIC PLAN STRATEGIES

Influencing characteristics	Council strategies
Ecology & Natural Resource Management	<ul style="list-style-type: none"> - Encourage development opportunities enabled by the natural environment - Promote sustainable access to and beneficial use of the natural environment - Promote the natural environment as a key attractor to the Huon Valley
Utilities & Infrastructure	<ul style="list-style-type: none"> - Identify strategic growth projects - Active promotion of Council's infrastructure
Arts, Culture, Recreation & Tourism	<ul style="list-style-type: none"> - Ensuring accessible services with supporting infrastructure - Promote existing spaces to enable activities
Population	<ul style="list-style-type: none"> - Promote existing spaces to enable activities - Providing zones and places for people to work, live and invest - Promoting the Huon Valley as a place to work, live and invest

Source: Huon Valley Council, 2015

Huon Valley Township Walking Track Strategy

The Huon Valley Township Walking Track Strategy outlines several objectives pertaining to walking tracks. They are split into primary and secondary functions, which are all favourable to the Pathway. The strategy identifies the need for more and better pathways, including between destinations, and recognises both the tourism and recreational opportunities.

TABLE 2: THE HUON VALLEY TOWNSHIP WALKING TRACK STRATEGY OBJECTIVES

Primary functions	Secondary functions
To provide additional or enhanced recreational walking opportunities for residents and visitors	Tourism: providing information on local environment and cultural features along trails at trailheads
To provide pedestrian access to or between specific destinations and features such as viewpoints, foreshores, picnic areas and recreation grounds	
To provide improved pedestrian (and, where appropriate, cycling and/or horse riding) links between local communities	

Source: Huon Valley Council, 2015

Huon Valley Economic Development Strategy

The Huon Valley Economic Development Strategy describes how Council's economic programs and activities can help foster Huon Valley's local business and local community. This Strategy aligns with the Huon Valley Council Strategic Plan, and relevant goals are summarised below.

TABLE 3: HUON VALLEY ECONOMIC DEVELOPMENT STRATEGY STRATEGIC DIRECTIONS

Economic development objectives	Key focus areas
Enhance and develop the Huon Valley as a destination for high quality tourism experiences and services	Actively encourage investment in areas that have been strategically identified to improve the overall visitor amenity and service provisions/experiences

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	Maintain effective marketing and promotion of the region for the purposes of tourism through the Huon Trail and Huon Valley Brand
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Effectively leverage off the Huon Valley's strategic location for the purposes of attracting residential and business investment and growth, and improve the destination appeal for visitors

Promote investment and development opportunities in the Huon Valley in targeted sectors including: tourism, agricultural and retail/services industries

Source: Huon Valley Council, 2015

The Pathway, when constructed will encourage additional investment into the town, particularly businesses related to tourism and retail. The Pathway will thus assist Council in meeting the objectives of the Economic Development Strategy.

Huon Valley Health and Wellbeing Strategy

The Huon Valley Health and Wellbeing Strategy focusses on supporting positive change in health and wellbeing in the Huon Valley. It has a focus on the community's most pertinent issues. Priorities and aspirations that are relevant to the Pathway are set out below.

TABLE 4: THE HUON VALLEY HEALTH AND WELLBEING STRATEGY PRIORITIES AND ASPIRATIONS

Priority Areas	Action Areas	Aspirations
Connecting People	Inclusion and interaction	People of all ages have fulfilling and meaningful connections and a sense of belong in their community
	Young, healthy and well	Young people are resilient and optimistic, feel connected and valued, and can find the right support to meet their needs
Connecting to Place	Getting around	People move easily around, and out of, the Huon Valley to meet their health, social, educational, work and other needs
	Active outdoors	Our towns and hamlets are pedestrian-friendly, connected by a network of cycling tracks and walking trails, and have active recreation and exercise spaces that encourage participation and use

Source: Huon Valley Council, 2015

The proposed pathway enables and contributes the strategy as it would connect people to place, in this case the picturesque and highly valued Huon River, thus achieving a greater sense of belonging. It would foster connections between the community members who choose to recreate along it, would encourage people to be more active outdoors, particularly by foot and bike, and would aid greatly in moving people around the municipality.

Huonville-Ranelagh master plan

The Huonville-Ranelagh Master Plan was developed with extensive stakeholder engagement, background analysis and site investigations. Key directions, recommendations and actions are laid out below, all of which the Pathway would support.

- Undertake an analysis of further ways to integrate Huonville and Ranelagh with the Huon River, including consideration of water access infrastructure.
- Analyse options to improve integration with the Huon River in Huonville and Ranelagh
- Present Huonville as a gateway to Huon Valley
- Interconnect directions to extend and improve the trail and footpath network

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- Create a key attractor for Huonville.

The proposed pathway would be a key attractor to Huonville, and would be a key piece of connecting infrastructure between Huonville and Franklin, second only to road infrastructure. It would also greatly increase people’s access to the Huon River; at present public access is extremely limited past the main promenades of the two towns.

Franklin foreshore master plan

The Franklin Foreshore Master Plan integrates proposals from the Franklin Township Plan 2003 with recent developments and to address issues raised by the community. Specific to this Project, community consultation identified an on-going desire for greater connectivity of high-quality path networks linking the entire foreshore. This mirrors a recommended action set out in the 2003 plan to construct a multiple use foreshore shared trail between township entrances to cater for pedestrians and bike riders.

The proposed Pathway would deliver on the ongoing community desire for a high quality path network that would link the town’s foreshore areas.

Huon Valley Recreation Plan (Draft)

The Huon Valley Recreation Plan is still in draft form, yet has been included in this policy alignment due to its importance the project.

The Plan’s vision statement is consistent with the Huon Valley 2020 Community Plan and the Huon Valley 2010-2015 Strategic Plan. The vision for recreation in the Huon Valley is:

“The Huon Valley will be a liveable place where planned open space and recreation opportunities are actively managed and supported providing health and well-being, environmental, sport and recreation, economic and social benefits to the community”

The plan sets out a set of recreation planning principles which are set to guide decisions and planning relating to open space and recreation over the long-term. These are:

- Fairness, Equality and Access
- Life-Long Involvement
- Quality of Experience and Safety
- Continual Improvement of open space and recreational facilities
- Sustainability
- Multiple-Use and Efficiency
- Diversity of Opportunities
- Partnerships/Shared Responsibility
- Making a Whole-of-Council Commitment
- Organisational Capacity.

The Pathway aligns with all principles set out in the Recreation Plan. It will promote equality and access to recreation facilities for people with all abilities. It is multi use in design, will be built to a high quality standard and will utilise sustainable materials when possible. The pathway will also promote lifelong involvement in physical activity, and will demonstrate council’s commitment to continually improving their open space and recreational facilities.

The implementation of the recreation plan is centred around four future directions:

1. Supporting Council’s capacity and operational processes to help deliver recreation benefits to the community.
2. Improve existing recreation facilities, programs and services.
3. Develop new recreation facilities, programs and services to meet identified community needs.
4. Fostering synergies for recreation and tourism benefits within the Huon Valley.

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The pathway will meet all four future directions, in particular the fourth, as it will be marketed as a tourism drawcard as well as being a facility for community members.

2.2 State Strategic Alignment

At the State level, the strategic alignment of the proposed pathway was assessed:

- State Government Goal: A Healthy Tasmania
- Tasmanian State Government – Jobs and Economic Plan (2016 update)
- Tourism 21
- Tasmanian Visitor Engagement Strategy
- Destination Management Plan – Destination Southern Tasmania (2014)
- Tasmania Cycle Tourism Strategy
- Visitor Economy Strategy

State Government Goal: A Healthy Tasmania

In February 2015, the Tasmanian Liberal Government committed to a goal of making Tasmania the healthiest population in Australia by 2025. The goal recognised that:

- 21.7 per cent of Tasmanians smoke, compared to 18 per cent nationally
- 69.4 per cent of Tasmanians are physically inactive, compared to 67.5 per cent nationally
- 65.6 per cent of Tasmanians are now overweight or obese, compared with 63.9 per cent five years ago, and
- 39.4 per cent of Tasmanians have high cholesterol – compared to 32.8 per cent nationally.

Importantly it recognised that a healthier Tasmania must also start with promoting a healthy lifestyle and preventing chronic disease. The pathway will assist in promoting a healthy lifestyle by enticing local residents to walk and cycle more in their local area.

Tasmanian State Government – Jobs and Economic Plan (2016 update)

Economic growth and job creation are the State Liberal Government’s ‘greatest priorities’². The Government wishes to support Tasmania’s competitive strengths to drive Tasmania’s economy and build confidence. The current State Government has a target of reducing Tasmania’s unemployment rate to at least the national average.

With the intended boost to the local economy by attracting more tourists (and thus more tourism expenditure), the pathway will assist in creating more jobs and strengthening the Tasmanian economy.

Tourism 21

Tourism is supported by many institutions including Tourism Tasmania, the Department of State Growth, Tourism Industry Council Tasmania, four Regional Tourism Organisations, the 29 Local Government Areas, many Local Tourism Associations and the Tasmania Visitor Information Network.

Their collective strategy is Tourism 21 which aims to bring 1.5 million visitors per annum to Tasmania by 2020. A priority for the strategy is to:

“Invest in quality visitor infrastructure Investment in private and public infrastructure is the backbone for growing the visitor economy. For Tasmania to achieve 1.5 million visitors a year by 2020 requires the ongoing development of exciting new visitor experiences to drive interest in Tasmania, stimulate visitor demand and encourage travel within the state.”

The Pathway is a fine example of the type of quality visitor infrastructure the Tourism 21 plan is keen to see delivered in Tasmania.

² Tasmanian Government – Jobs and Economic Plan 2016 Update

Tasmanian Visitor Engagement Strategy

The Tasmanian Visitor Engagement Strategy is a key action of T21 and sets out the guiding principles, elements and actions that the State Government will undertake with industry to rethink and strengthen the State's approach to visitor engagement.

The following principles were developed to guide the future of visitor engagement in Tasmania:

- Provide a landscape where visitors engage in meaningful experiences rather than skimming the surface of the destination.
- Encourage greater interaction between locals and visitors.
- Help visitors connect with the rich stories that set Tasmania apart.
- Inspire visitors to create and share unique itineraries that meet their special interests and get off the beaten track.
- Let the landscape, culture and people of Tasmania lead the story through seamless and, where possible unobtrusive visitor engagement.

The Pathway aligns strongly with these principles- particularly as it will create a unique, quintessentially Tasmanian tourism experience that will allow visitors to interact with local Huon Valley community members.

Destination Management Plan – Destination Southern Tasmania (2014)

With record levels of visitation to Hobart, the key priorities for Destination Southern Tasmania are to provide a better experience to extend the length of stay and yield, (or encourage frequent, repeat visits), and to achieve wider regional dispersal - as opposed to attracting significantly increased visitor numbers.

The Management Plan argues that successful regional dispersal has only occurred with the bundling of attractive, market-led experiences and accommodation – the success of Bruny Island being a key example. Accommodation occupancy rates in Southern Tasmania currently sit at more than 85%, however this figure is largely driven by the exceptionally high occupancies in central Hobart. Beyond this core tourism precinct, many accommodation operators are struggling with occupancies closer to 35-40% in regional areas.

“Despite the optimism around the latest visitor data, the reality remains that regional Tasmania is not experiencing a corresponding growth. This is a key factor in considering Hobart vis-à-vis the broader Southern region. The current situation reflects a ‘two-speed’ visitor economy.”

Further, the DMP argues that product development and investment is paramount in the Southern Region. This is necessary to capitalise on the record visitor numbers to the immediate Hobart area, and to encourage regional dispersal. This investment should cover both the development of new and existing products and infrastructure. These investments, such as the development of accommodation in ‘wilderness’ areas, revamped visitor centres, food and beverage tours, tasting centres and improved tourism signage, to name a few will have cross-over impacts and meet a range of objectives; well-focused investments leverage further opportunities.

The Pathway would be a strong addition to the tourism infrastructure in the wider Southern Tasmanian offering, aiding in further dispersing tourists out of Hobart and into the broader Southern region.

Tasmania Cycle Tourism Strategy

The Tasmania Cycle Tourism Strategy outlines the state government's desire to position Tasmania as a world class cycling destination. The strategy identifies key priority areas and

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actions that can be undertaken to achieve them. Priorities and actions relevant to this Project are set out below.

TABLE 5: THE TASMANIA CYCLE TOURISM STRATEGY PRIORITY AREAS AND ACTIONS

Priority Areas	Actions
Infrastructure that provides diverse, accessible and high-quality visitor experiences	Continue to consolidate and strengthen cycle tourism in Tasmania through supporting and developing the emerging hub of Hobart and the Southern region
Experience development that positions Tasmania as Australia's best cycling destination	Promote the unique experiences of Tasmanian cycle tourism as hubs focussed on Hobart and the Southern region
	Prepare and implement a cycle tourism marketing plan by linking cycle experiences to accommodation/activities and develop itinerary options for multi-activity holidays

The Pathway would prove a significant drawcard for cycle tourists; particularly those who favour off road or path cycling (including those with families). The relatively short length of the Pathway would allow a wider group of cyclists to enjoy the experience, as opposed to longer, more advanced cycling tracks already available in Tasmania.

Visitor Economy Strategy

The Tasmanian Visitor Economy Strategy is a collaborative effort between the Tasmanian Government and Industry to promote growth in Tasmania's visitor economy. Relevant priorities and actions are presented below.

TABLE 6: TASMANIAN VISITOR ECONOMY STRATEGY PRIORITIES AND ACTIONS

Priorities	Actions
Generate more demand for travel to Tasmania	Support the state's regional tourism organisations to promote the distinct characteristics, products and experiences of each region with the Tasmania offering
	Support the development of new visitor infrastructure and experiences in Tasmania to stimulate visitor demand
Invest in quality visitor infrastructure	Invest in priority tourism infrastructure and products
	Invest in public infrastructure and transport systems that enhance visitor experiences

The Pathway is an ideal example of investing in quality visitor infrastructure that will enhance visitor experience. This in turn will spur on increased visitor demand.

Overall alignment

The proposed Huon River Foreshore Shared Pathway strongly aligns with the goals and strategies of both Huon Valley Council and the Tasmanian Government, as it intends to provide numerous benefits to residents, tourists, Huon Valley and Tasmania as a whole. The Pathway aims to improve community liveability, attractiveness as a tourism destination and the increase the strength of the local economy.

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2.3 Socio-economic profile

A short socio-economic profile of the Huon Valley has been collated to further set the context of the proposed pathway.

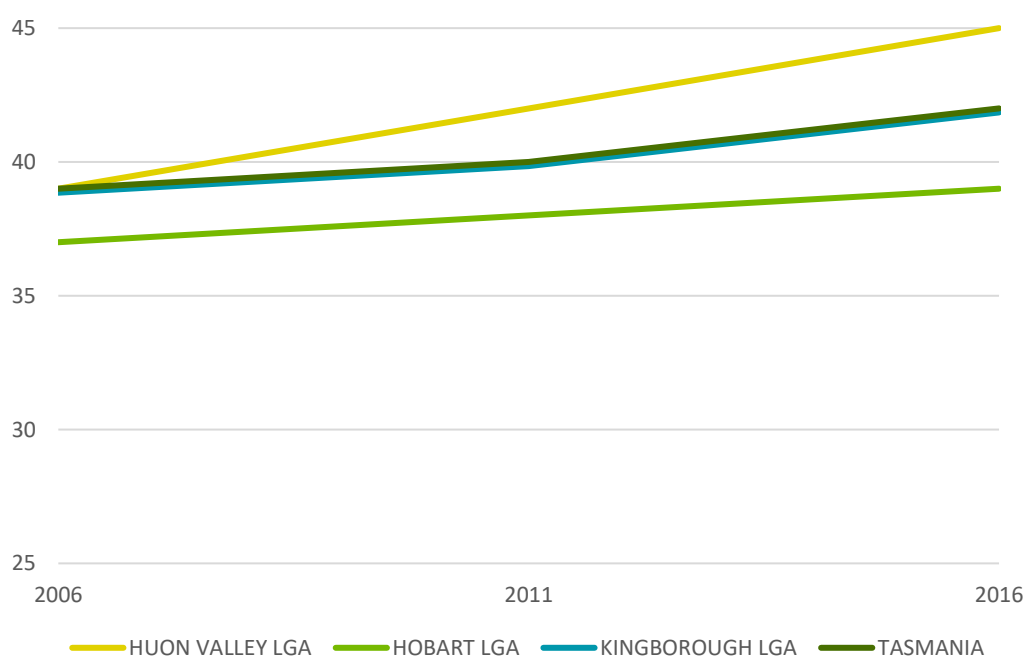
Population and employment

The population of the Huon Valley has grown steadily, rising from 14,000 in 2006 to around 16,200 in 2016. This represents an increase of 2,200 residents equating to an average annual growth rate (AAGR) of 1.5 per cent. By 2021 the population is set to reach 17,687 (Tasmanian Treasury Population Projections), and almost 20,000 by 2031 at a growth rate of between 1.1 per cent and 1.6 per cent per annum. Compared to much of Tasmania, these are high population growth rates. These new residents will use existing but also demand new recreational opportunities.

While population growth is important to demand, other population factors including age profile are also important.

Figure 2 shows the change in median age of the Huon Valley, with the neighbouring Kingborough and Hobart, and Tasmania as a whole included for comparison. The figure shows that while the population of the state as a whole is ageing, though the median age of the population of the Huon Valley has grown even more rapidly. Driven by the popularity of the region as a location for retirement-age residents, the median age across the region grew from 39 to 45 in only ten years between the 2006 and 2016 censuses.

FIGURE 2: MEDIAN AGE OF RESIDENTS

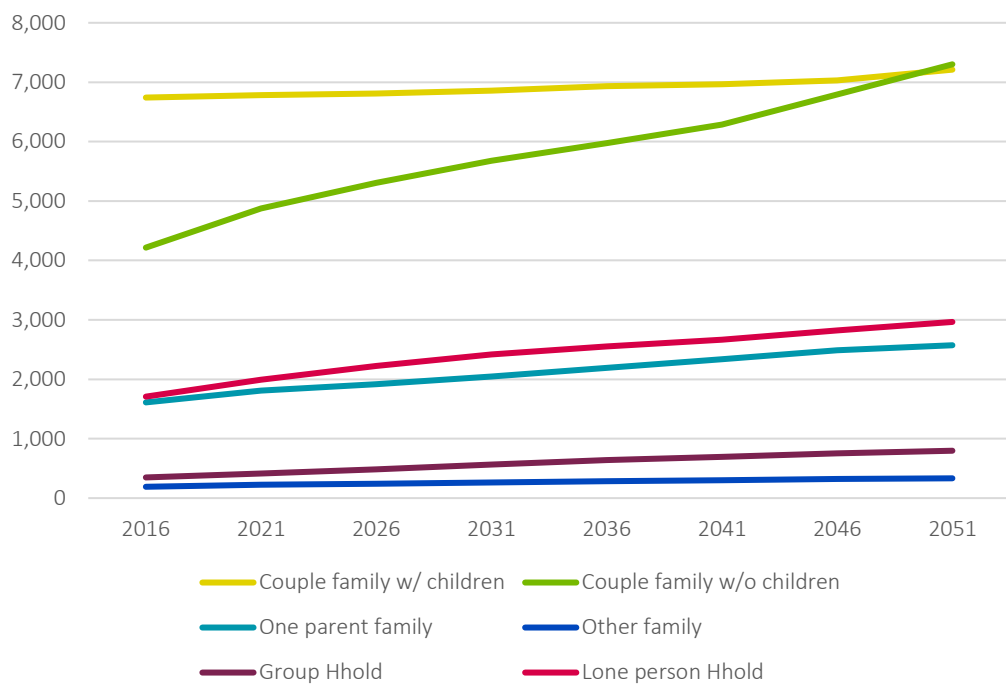


Source: ABS Census of Population and Housing

The ageing of the population is also reflected in population forecasts and household composition (Figure 3). At current rates, the number of households with children will remain fairly constant over the coming decades, while couple families with no children will grow the most.

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FIGURE 3: FORECAST POPULATION BY HOUSEHOLD TYPE IN THE HUON VALLEY LGA

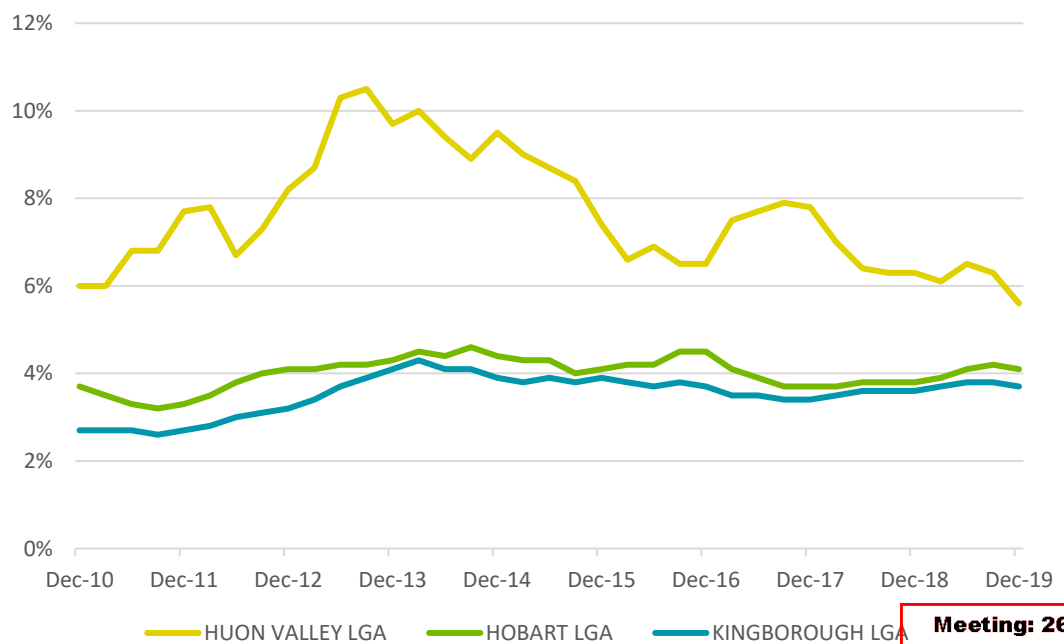


Source: SGS Economics and Planning (2020), Housing demand model for the Huon Valley (not published)

The aging population will require accessible recreational facilities, such as the pathway, where residents can walk and enjoy nature and the company of friends on a relatively flat and safe surface.

Turning to employment, the Huon Valley has experienced high rates of unemployment in recent years (see FIGURE 4). This shortage of jobs presents a major challenge, with a need to create economic activity (and employment) to support and enhance the quality of life of residents.

FIGURE 4: HUON VALLEY UNEMPLOYMENT RATE COMPARED TO NEARBY LGAS (2010-2019)



Source: SGS Economics and Planning (2020), Australian Department of Employment (2020) Small Area Labour Markets December quarter 2019

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Overall alignment

The proposed Huon River Foreshore Shared Pathway can contribute to the social wellbeing of the Huon Valley by providing a high-quality recreational opportunity for the growing population, an opportunity that is also accessible for the population as it ages and for young families moving to the municipality. The provision of the pathway and the related business opportunities may also provide new jobs to address high unemployment rates.

The tourism industry

The tourism industry is a significant contributor to the Tasmanian economy and its value as an industry of employment is greater than most other industries in the state. Visitors to the regions in Tasmania contribute to local economies, directly and indirectly, accessing accommodation, food and drink, local tours, activities and paying for national park fees.

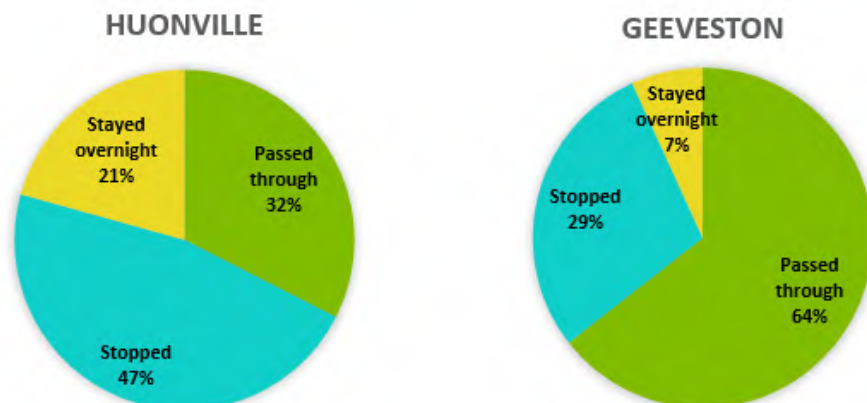
The number of visitors (tourists) to Tasmania has increased since tourism records started in the early 1980s from 286,500 visitors in 1981 to 1.32 million in 2019 (Tourism Tasmania, 2019). More recently, visitor numbers to Tasmania have increased substantially – from 855,200 in 2011-12 to 1.32 million in 2019 (year ending March), an increase of 54 per cent in just under nine years.

For the Huon Valley, there were 431,000 visitors in 2018. This included 6,000 from overseas, 75,000 interstate tourists who stayed overnight and 350,000 (81% of visitors) who just visited for a day-trip³.

Tourism visitation to Huonville specifically, where the pathway will begin, can be separated into three groups based on the length of time they spend in the town. There are a considerable number of visitors who simply drive through the town without stopping (32%) and therefore don't spend any money in the town (Figure 5); visitors who stop in the town for a look around (47%) who may have a meal, visit retail outlets, purchase fuel, or partake in cultural or recreational activities; and visitors who spend time staying overnight in the town (21%).

An issue for the towns of Huonville and Franklin, and the broader region, is that visitors tend to see the region as a day-trip from Hobart and do not spend much time in the towns including Huonville. This is reflected in visitor data (as shown in Figure 5) which also includes the town of Geeveston, located to 10-15 minutes south of the location for the pathway. The proposed pathway would provide a visitor destination in the towns of Huonville and Franklin, and a reason for visitors to stop, spend time and spend money.

FIGURE 5: PLACES VISITED BY TOURISTS AND WHETHER THEY PASS THROUGH, STOP OR STAY (2018/19*)



*Year ending September 2019

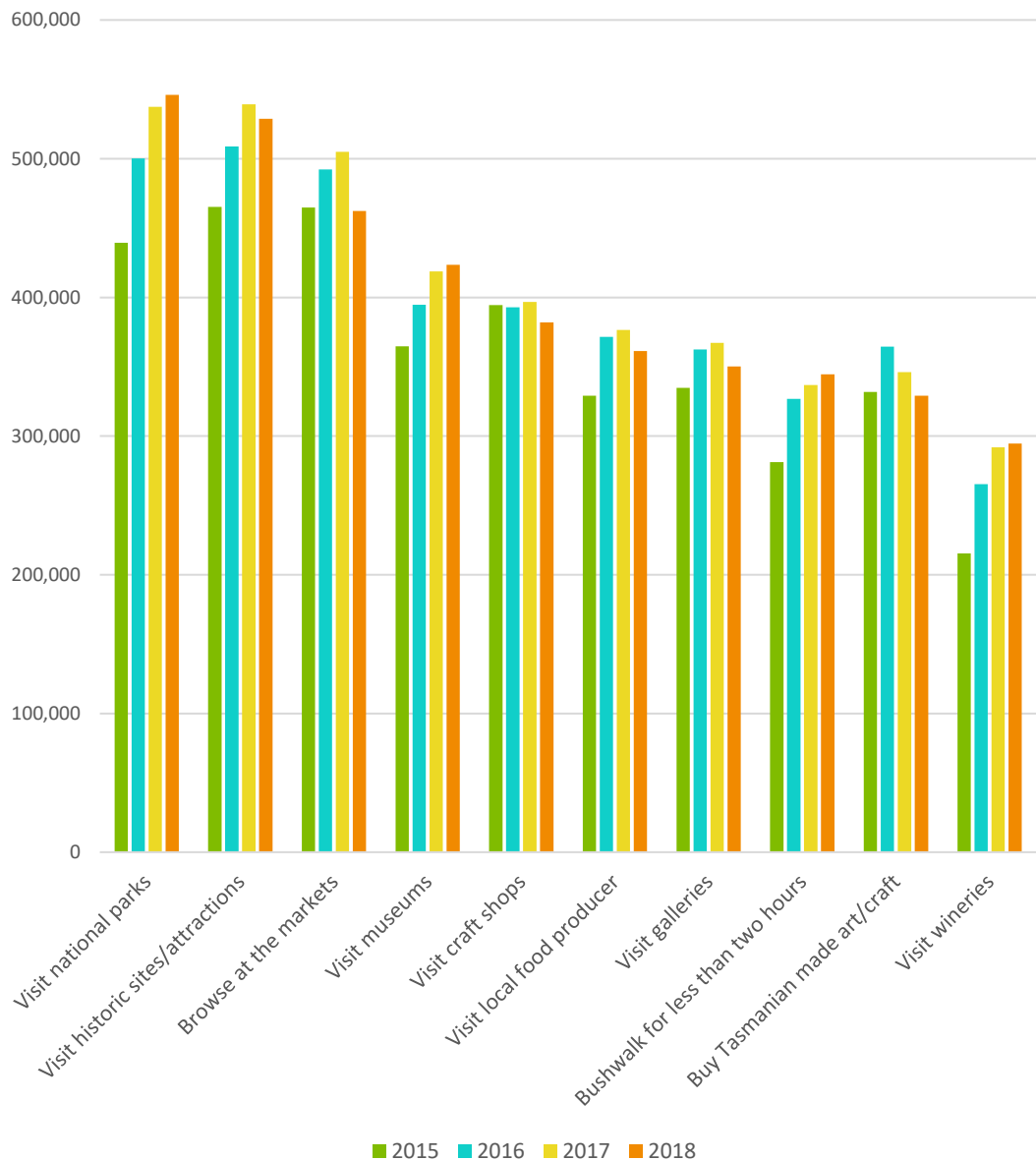
³ Tourism Research Australia (2019). Local Government Area Profiles for 2018

Source: SGS (2020) using Tourism Tasmania (2020) Tasmanian Visitor survey data

The pathway plays to the natural strengths of the Huon Valley and Tasmania’s tourism sector more broadly. Tasmania’s tourism industry has traded upon and leveraged off Tasmania’s appeal as a nature and wilderness destination. Results from the Tasmanian Visitor Survey show that recreation in natural areas is exceedingly popular with visitors to Tasmania, with visiting national parks and short bushwalks being in the top ten most popular activities.

Participation in these two activities has been growing, by 7.5 per cent per year since 2015 for visiting national parks and by 7 per cent for short bushwalks. Those are faster growth rates than the growth rate in visitors to Tasmania (4.4 per cent per year since 2015), meaning that the popularity of these activities is growing faster than growth in visitors, demonstrating an increasing desire for visitors to visit natural areas and do short bushwalks. Intrastate tourism (i.e. Tasmanians participating in activities) are not included in the TVS, so total participation in these activities in Tasmania would be higher than shown in Figure 6.

FIGURE 6: TOP 10 OVERSEAS AND INTERSTATE VISITOR ACTIVITIES WHILE IN TASMANIA



Source: Tasmanian Visitor Survey (2019, year ending December 2018)

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Other activities recorded by visitors in the TVS, relevant to the nature-based tourism such as the pathway include:

- Viewing wildlife (not in a wildlife park or zoo) (256,000 participants, growing 9% per annum)
- Bushwalk for 2 to 4 hours (231,000 participants, growing 10% p.a.)
- Experience Tasmanian Aboriginal culture (56,000 participants, growing 16% p.a.)
- Canoe/kayak/sea kayak (28,000 participants, growing 9% p.a.)
- Mountain bike (25,000 participants, growing 24% p.a.)

All of these activities are growing strongly in popularity. Visitors who participate in these activities would be attracted to the pathway.

From a regional perspective, visitors will also be engaging in a broader range of activities outside of the nature and wilderness-based experiences, such as food and wine, visiting historic sites, browsing at markets and arts and culturally based experiences. Visitors to the pathway can find all these complementary activities in the surrounding region, including in Franklin and Huonville. Importantly, these experiences may increasingly be offered at the start, end and along the trail as business opportunities are ceased upon.

Existing Regional attractions

There are a range of existing, high quality attractions in the Huon Valley including adventure-based outdoor activities, galleries, museums, and sites of interest. Key sites include the Tahune Airwalk (currently closed due to bushfires), Hartz Mountain National Park, Hastings Caves and Thermal Pool, Cockle Creek/South Cape and the Wooden Boat Centre.

The quality of the hospitality offered in a region is also crucial in attracting visitation. The existing supply and distribution of food and beverage attractions in the region reflect the local agricultural sector, which includes ciders, cherries, apples and wine. The availability of local produce is an important consideration for the tourism context.

The availability of these existing attractions and the 'local' produce and hospitality choices will complement the development of the pathway by providing opportunities to visitors to explore the broader region (and vice-versa).

Overall alignment

The current tourism industry in the region comprises a range of attractions, accommodation, and food and beverage facilities. A key issue is that visitors currently spend little time in the towns of Huonville and Franklin. The Huon River is a major asset that is underutilised. Adding an iconic regional tourist drawcard to the Huon Valley can improve the overall tourist offer enticing existing visitors to stay longer or attract new visitors. This will also grow visitation to existing attractions as well.

Sports and recreation trends

Peoples involvement in recreational activity is related to a variety of factors (VicHealth, 2010). These include:

- Fitness: maintenance of health.
- Social engagement: being a member of a club provided an opportunity to meet others.
- Attitude: thrills from competitiveness.
- Ease of participation: low cost of involvement, often related to equipment and ability to participate with flexibility. Low skill required to participate.
- Age: younger participants are less prone to injury and less likely to have work commitments.
- Life events: priorities are different when a family is not involved.

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Recreation assets are incredibly important for the community, with, for example, research shows that young persons who participate in sport are more likely to be physically active as adults (VicHealth, 2010).

Trends have demonstrated that the way Australian's participate in sport and recreation is changing. Participation is moving towards individual pursuits and drifting away from traditional organised sporting clubs. In face of the changing nature of sporting participation, considerations such as flexibility in participation opportunities, leveraging on the social involvement and the re-prioritising of health and personal benefits that accompany participating, should serve as key drivers.

The CSIRO, for the Australian Sports Commission, identified 'Megatrends', which are likely to shape the Australian sports sector in the future. Two of the key identified trends are summarised below (CSIRO, 2013):

- Changing lifestyles are impacting participation in sport; individualised sport and fitness activities such as aerobics, running, walking, along with gym membership are on the rise. People are fitting sport into their increasingly busy and time-fragmented lifestyles to achieve personal health objectives.
- Lifestyle, adventure and alternative sports with some element of danger and/or thrill-seeking are becoming increasingly popular, propagated by the use of social media and generational change. These sports include skateboarding, rock climbing, mountain biking, hiking and kite surfing. Generational change will cause increased participation in these and similar sports.

Other studies have found that one in five Australians now regularly play competitive sports, down from one in four in 2001 (Roy Morgan, 2017). The participation rates of many traditional, structured sports have stalled in recent times, whereas there has been strong growth in the participation rates of less structured activities such as walking and cycling. Mountain biking is a major growth sport in not only Australia but Tasmania in particular. People are favouring more flexible, non-organised physical activity and pursuing new lifestyle and adventure sports.

Overall alignment

The proposed Huon River Foreshore Shared Pathway targets growing segments of recreational activities, namely less structured activities like cycling, walking and kayaking. The local population will increasingly demand assets like the shared pathway with kayak landings, as opposed to more traditional recreational assets such as sports grounds. The use of the pathway will also lead to community.

3. COMMUNITY ALIGNMENT

The community engagement activities undertaken for this provide a clear picture of community and stakeholder support for the Pathway. Online survey results and workshop findings relating to community support (qualitative and quantitative) are presented here and have informed the cost-benefit analysis.

Huon Valley Council were keen to understand community support, concerns and perceptions of the Pathway, and for these insights to be integrated into the findings of SGS’s analysis. Thus, SGS and Council jointly held a number of community engagement exercises over a three month period (December 2019- February 2020). The engagement consisted of a “have your say” survey, which was hosted online on Council’s website, and was also available in hard copy at Council’s offices, post offices and visitor information centres in Huonville, Geeveston and Franklin. The survey was designed to capture useful insights from Huon Valley residents and visitors alike. SGS and Council also hosted three community workshops in late February over a two day period; one workshop with landholders who live along the Huon River (and whose land abuts the Crown Land where the pathway would be located), and two workshops with the wider Huon Valley Community.

The participation rate in the engagement activities was very high. In total, 596 people responded to the “have your say” survey, including 578 online responses and 18 responses filled out in hard copy. The workshops were also very highly attended, with 29 participants at the landholder’s workshop, and a further 87 community participants across the two community workshops.

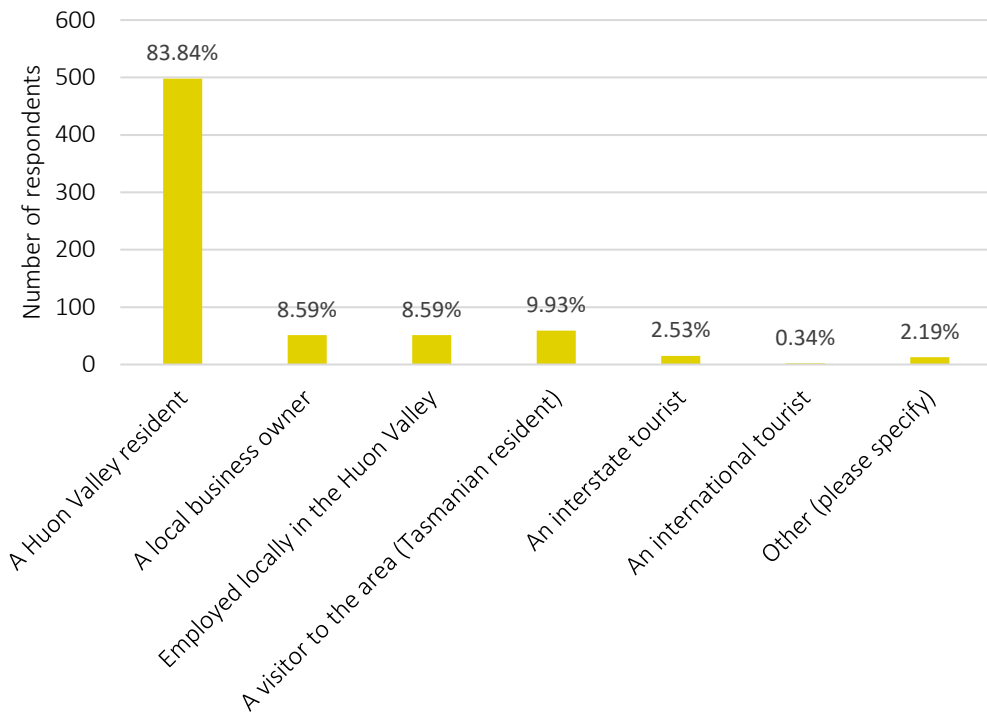
Due to the sheer volume of the responses and to protect the anonymity of participants, only a select number of individual responses have been provided within this report. The majority of the responses have been aggregated by topic, theme and sentiment.

3.1 Survey Insights

The overwhelming majority of survey participants (84%) were Huon Valley residents. This is not surprising due to the primary location of the survey being on Huon Valley Council’s website (and linked to on Council’s social media and noticeboards). It is positive to see that the survey did reach some Tasmanian, interstate and international visitors, albeit in smaller numbers.

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FIGURE 7: RESPONSES TO Q1. PLEASE TICK THE FOLLOWING THAT BEST DESCRIBES YOU. I AM:

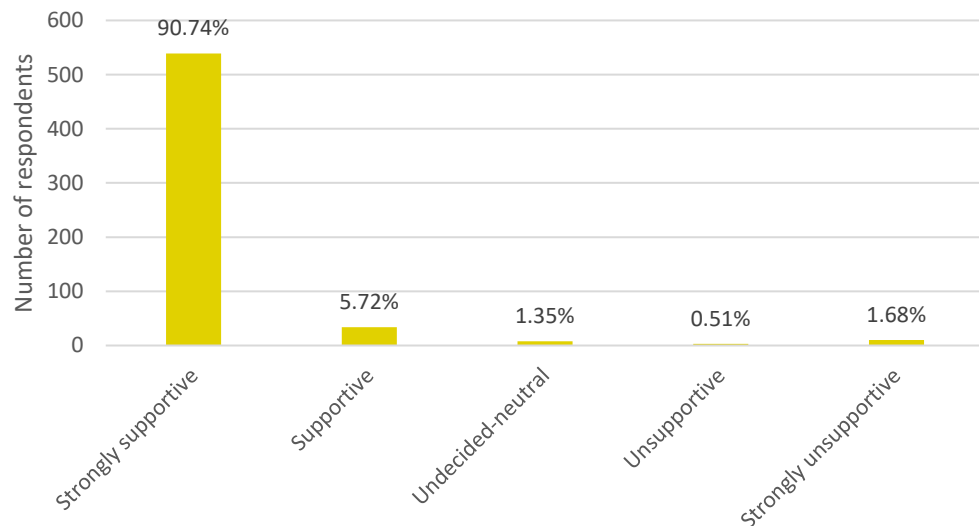


Source: Huon Valley Council: Have your say on the Huon River Foreshore Shared Pathway Project: Survey results
 Respondents: 594

Overall sentiment

The support for the Pathway amongst survey respondents is overwhelming. Nearly 91% of survey respondents are strongly supportive of the pathway, with a further 5.7% of respondents stating they were supportive.

FIGURE 8: RESPONSES TO Q2. HOW SUPPORTIVE ARE YOU OF THE PROPOSED PATHWAY?



Source: Huon Valley Council: Have your say on the Huon River Foreshore Shared Pathway Project: Survey results
 Respondents: 594

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A total of 571 responded provided further explanations for their level of support. The below text provides a small sample of responses, with the green and blue text either a strongly supportive or supportive responses and the red response being strongly unsupportive.

"I've thought for a long time that Huonville (and surrounds to an extent) don't make full use of the beautiful river we have on our doorstep. I know there's the parklands by the river, but the river itself is almost totally obscured for the most part by shrubs and trees. I'm not saying they should be removed at all, but this initiative would certainly go far beyond what I would ever have expected in terms of taking full advantage of the river. And we certainly would make full use of it".

"A fossil free, healthy & cost free travel option for residents, visitors & children that facilitates observation of the fast disappearing natural world. Long distance bicycle transport was my first option for many years; such activity made me happy. The highway appears to be increasingly dangerous"

"I believe this would be a greatly appreciated project from both local residents and visitors. I, and many of my friends have also been stuck in the unfortunate situation of having to walk this road both during the daytime and at night, and I personally think some areas are currently far too unsafe to traverse on foot alone, (mostly corners). I also believe this would benefit tourism in the Franklin region greatly.

"The Huon River is a magnificent attraction for the area and currently I don't believe is fully accessible to people. It will create another, very good reason to spend time in and around Franklin and Huonville. In addition, our family are keen cyclists and would like to be able to ride from Franklin to Huonville for shopping but currently shoulders on the Huon Highway are narrow or non-existent in places making the ride somewhat dangerous".

"I support the development of the foreshore to allow access to the river. Too much of the Huon River is inaccessible and can't be used by anyone. The Huon River is a big part of the Huon Valley, yet it is predominantly only looked at. More access will increase use such as walking the banks, fishing, swimming, boating in all forms and simply appreciating the river from different aspects".

"I work in the disability sector in the valley, and can foresee such a pathway would be a fantastic activity for the people I support. Additionally, I live in the Valley and often think how wonderful our foreshores are and would be interested in accessing this pathway to share with interstate visitors"

"I live in Huonville and work in Franklin. Tourists often ask me if there are any walks in the local area. I think having something like this would give tourists a reason to visit both Huonville and Franklin longer, rather than just as a stop off point on their way to the Tahune Airwalk, or Southport. It would also encourage local residents to be more active, be it cycling or walking"

"Would be amazing to bring our kids to utilise a path for walks, biking, pram strolls, dog walking etc! We get around the area so much but all by car and often complain there's no long enough walk for exercise and pram without walking through the town. So great for health and the community and will open Franklin up too! Do it!!"

"I live in Huonville and my parents live in Franklin so I often drive that road. I have walked it, ran it and cycled it but it's a horrid experience - the narrow road with fast traffic stops me from doing it more. I now have a kid and a dog and am always looking for place to take walks. We often drive the short distance to Huonville to walk along the waterfront - but the car trip is a real disincentive and it means we never walk our kid and dog at the same time! The river between Franklin and Huonville is beautiful and underutilised. We often recommend visitors walk the Franklin river front including the section upstream of the wooden boat centre with all the lovely natives. This connection would be such a boon for Franklin and Huonville tourism businesses - another attraction for people visiting the area. Especially an attraction that gets people active."

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“There is a severe lack of a walking trail of any decent length which is easily accessible close to Huonville, reaching most tracks involves driving a considerable distance first on roads that are often in poor condition, and this has been a major disappointment to us since moving to the Huon Valley. We regularly drive over to Kingborough just to be able to go for a good walk, as they have multiple tracks and trails of varying lengths, almost all of which are easily accessible along good roads. They leave the Huon Valley far behind in this respect. People are reduced to walking along the Huon Highway itself, which is extremely dangerous, just to take themselves or their dogs for a walk!”

“Complete waste of ratepayers resources, loss of privacy/ security for adjacent landowners”

“I walk everywhere. During the times I have lived in the Huon valley, I have felt very unsafe walking along highway and country roads. A path will be a lovely feature in this location, as well as improve health and safety of walkers”

“I'm concerned about litter being dropped along the pathway and ending up in our Huon River”.

“This is amazing on so many levels! This path would enable my family and many others to get more active and travel between Franklin and Huonville with less dependence on vehicles. Bringing a path like this is highly beneficial for increasing tourism, allowing the community to connect and also allowing people a good way to keep fit. I CANNOT recommend this proposal enough. PLEASE do this path!! With six children, this would change our lives and allow us to safely ride bikes with them into Huonville (we reside in Franklin) and spend quality outdoor time with them.”

Despite the high level of support shown by survey respondents, there are also concerns highlighted. These can be summarised by the following:

- Cost
- Parking options
- Protection from traffic
- Lack of appropriate consultation with Traditional Owners
- Type of material used
- Vandalism
- Lack of connectivity to other areas
- vehicular access to jetty sites
- Snakes
- Flooding events
- Cost vs benefit for ratepayers
- Decreased Safety
- Unauthorised use
- Visual disruption of the river view
- Maintenance
- Fencing
- spread of weeds
- Fast bikes / cyclists
- Lack of incorporation of local Indigenous knowledge and history
- Flooding events
- Cost vs actual benefit for ratepayers
- Impact on residents (privacy/ safety)
- Environmental impact (flora and fauna)
- Dogs off the lead
- Litter
- Appropriate signage
- Lighting
- Access points
- Width of the path

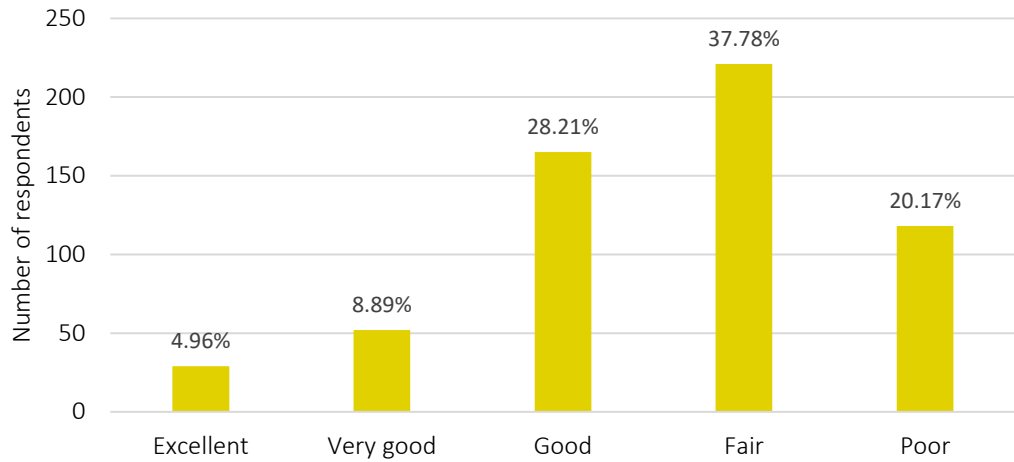
Where appropriate, these concerns have been reflected in the cost-benefit analysis, however, some concerns are related to the design, construction, management and maintenance considerations, and thus will be useful for Council to consider when undertaking these exercises.

Current access

A majority of 73 % (or 433 respondents) currently access the Huon River for leisure activities. The remaining 27% (or 161 respondents) do not. When rating current levels of access to the Huon River for leisure activities, nearly 38% of respondents rated their access level as fair. A further 28% rated their access level as good. Approximately 20% states that access is poor. Interestingly, only 5% of respondents rated their level of access as excellent (see figure overleaf).

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FIGURE 9: RESPONSES TO Q6: HOW DO YOU RATE YOUR CURRENT LEVEL OF ACCESS TO THE HUON RIVER FOR LEISURE ACTIVITIES?

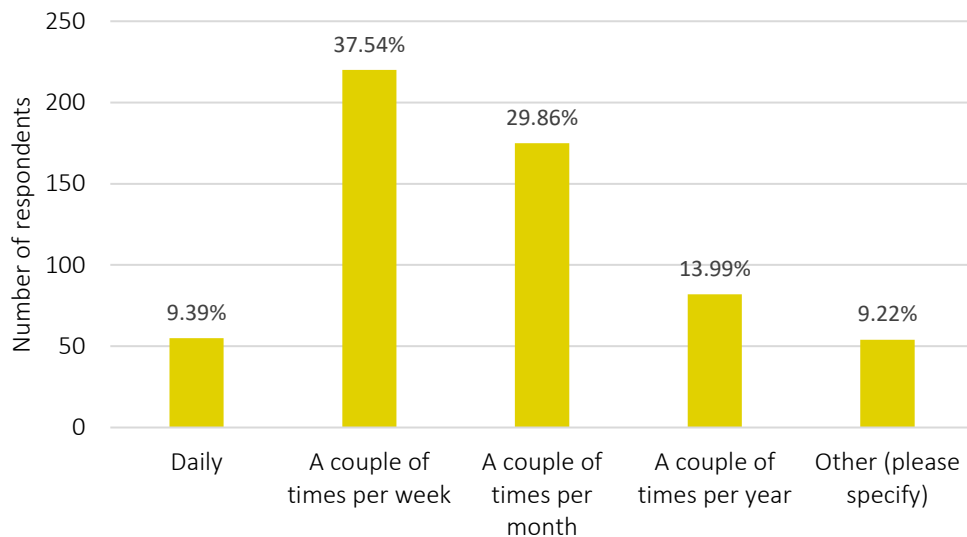


Source: Huon Valley Council: Have your say on the Huon River Foreshore Shared Pathway Project: Survey results
 Respondents: 585

Future use

Nearly 97% of survey respondents (574) note that they would personally use the pathway if it was constructed. This matches the levels of support (either strongly supportive, supportive or neutral) shown in earlier questions. When asked about how often they would use the pathway, the majority (37.5%) of respondents indicated they would use it a couple of times a week. This indicates high usage by the local community.

FIGURE 10: RESPONSES TO Q8: IF YES, HOW OFTEN WOULD YOU USE THE SHARED PATHWAY?

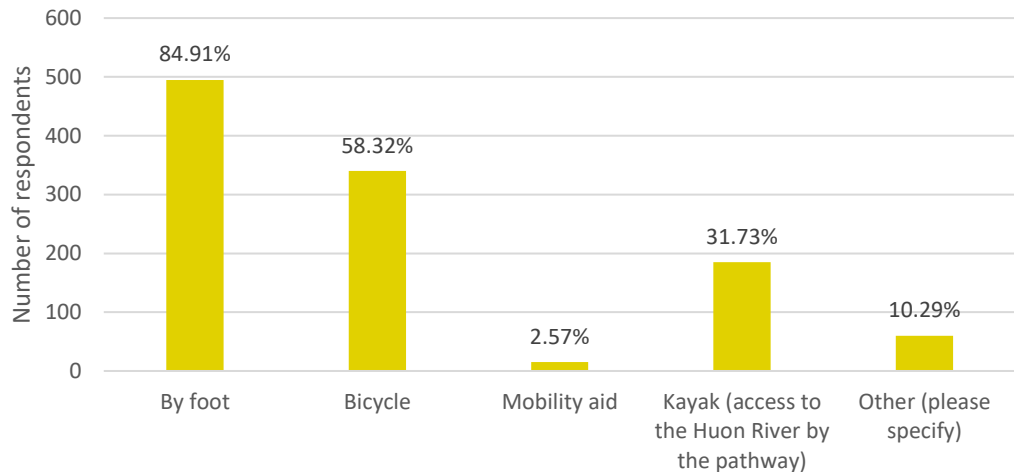


Source: Huon Valley Council: Have your say on the Huon River Foreshore Shared Pathway Project: Survey results
 Respondents: 586

Overwhelmingly, survey respondents intend to traverse the pathway by foot (85%), followed by bicycle (58%) and by kayak by increased access via the pathway (32%). As these percentages add up to more than 100%, it is clear that many survey respondents intend to use the pathway via a number of different transport methods. This again shows a strong level of usage.

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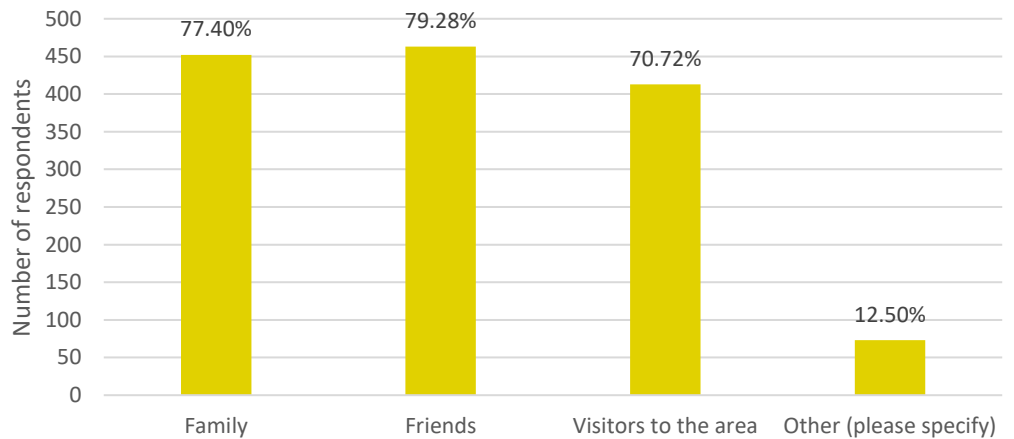
FIGURE 11: RESPONSES TO Q9: IF YES, WHAT METHOD OF TRANSPORTATION WOULD YOU USE ON THE SHARED PATHWAY?



Source: Huon Valley Council: Have your say on the Huon River Foreshore Shared Pathway Project: Survey results
 Respondents: 583

When asked if they would use the pathway with others, survey respondents indicated most that they would invite family, friends and visitors along (Figure 12). Other responses included with their dogs, with scout groups, walking groups and cycling groups.

FIGURE 12: RESPONSES TO Q10: WOULD YOU USE THE SHARED PATHWAY WITH OTHERS?



Source: Huon Valley Council: Have your say on the Huon River Foreshore Shared Pathway Project: Survey results
 Respondents: 584

The following table (Table 7) indicates the types of facilities that survey respondents see as being either essential or non-essential along the pathway. Benches are overwhelmingly seen as essential, followed by cultural, heritage and environmental interpretation, shelters and drinking fountains. Other essential infrastructure listed included dog poo bag dispensers, signage, appropriate parking, toilets and BBQs.

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Survey participants were also encouraged to be creative and draw their vision of the pathway. A selection of these have also been provided below.

Benefits and opportunities

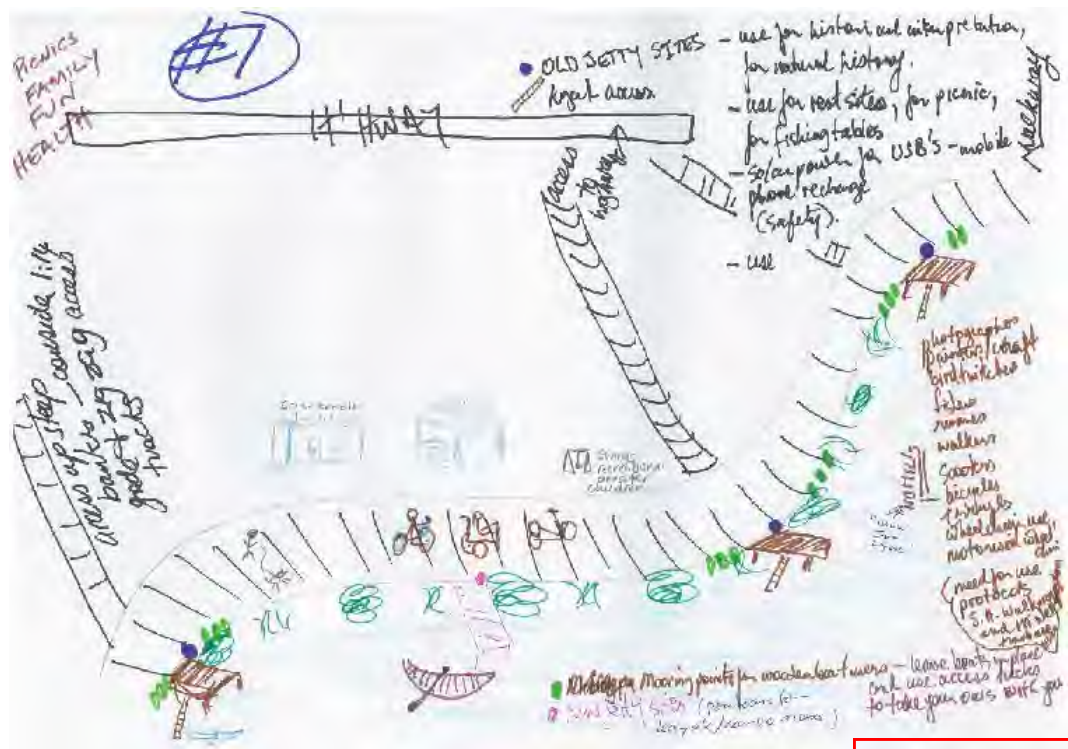
TABLE 8: BENEFITS AND OPPORTUNITIES

Category	Sub Category
Economic	Opportunity for water events and supporting facilities e.g. Parkrun events and river festivals, art festivals
	Hire businesses- bike, scooter, kayak, accessibility
	Water events and supporting facilities
	Supports new and existing businesses and entrepreneurship: food outlets, pop up cafes and coffee vans
	Employment opportunities using labour schemes such as Criminal Justice Scheme, Aboriginal Building/Construction/ maintenance Scheme Training Scheme,
	Increased tourism and visitation to town and staying rather than driving through
	Local produce stalls/markets: food market, Christmas market, plant market, produce market, night market
	Increased tourism and visitation to town
	Ferry to Craddock, Huonville, Franklin etc.
	Tours and walks: bush food tours, guided tours on nature, history and photography
	Accommodation opportunities
	Fishing lessons
	Shuttle bus
	Sponsored seats e.g. people who have passed away
	Attracting grants
	Possible extension to Ranelagh - reduce future development costs
	Employee retention due to commuter benefits
	Encourage local Valley recruitment in life of the project
	Join up to Skinners Creek and along esplanade - reduce future development costs
	Recreational
Adventure trail for mountain biking	
Increase passive recreation such as walking	
Water activities such as kayaking develops use of river and enjoyment of natural beauty (from viewing platform)	
School groups: educational walk, camps, triathlons	
Location for motor bikers to stop and stretch	
Passive recreation: Photography	
Linkage to Wattle Grove and Cygnet via walking and kayaking	
Outdoor fitness groups: tai chi and other free group activities	
Fishing platforms/ pontoon walkway, swimming spots	
Access to nature/ water	
Guided passive recreational tours	
Cycling activities including a range of bikes	
Attract wildlife, bird watchers and creation of bird hides	

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	Cycling extensions to Geeveston, Cockle Creek, Ranelagh and Judbury
	Opportunity for school groups: educational walks, camps, triathlons
	Bird Hides
	Geocaching site opportunity
Environmental	Alternative route to shops via walking/riding reduces carbon emission from cars
	Environmental impact awareness
Community	A visually beautiful pathway people will remember
	Connection between Huonville and Franklin
	Pride in the Valley
	Show off river
	Potential to become a design icon like Wakaluna, Gasp and Tamar Wetlands
	Aboriginal heritage honouring
	Inclusion in Tasmania map of walking tracks
	Sculptures along path e.g. Geelong
	Link to longer walk Judbury, South Cope walk
	Potential art and cultural display - annual walkway art prize like beach sculptures - Huon version of The Glover Prize
	Lifestyle: Personal health and wellbeing, physically and mentally - more opportunity to be outside
	Formalised usage of public jetties and pontoon
	Volunteer group opportunities and Aboriginal Rangers
	Improved physical health, decrease obesity
	Redefines local community identity
	Improved mental health: lower stress

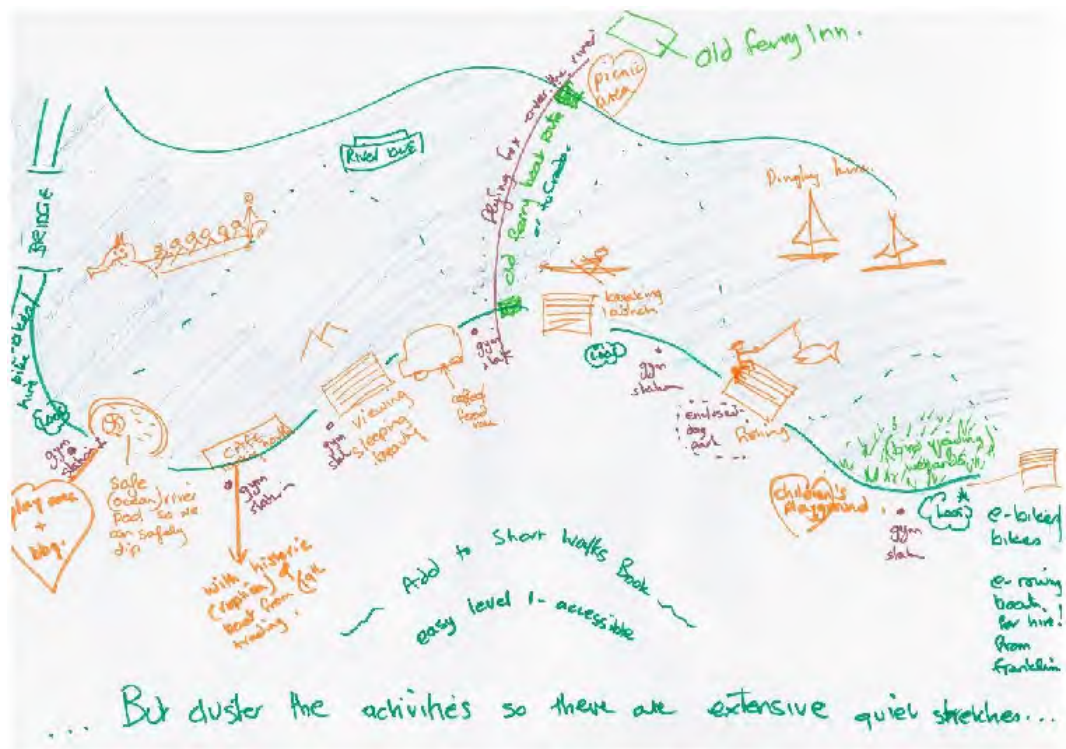
FIGURE 15: INTERPRETATION OF USE FROM SHARED PATHWAY



Source: community workshops

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FIGURE 16: INTERPRETATION OF USE FROM SHARED PATHWAY



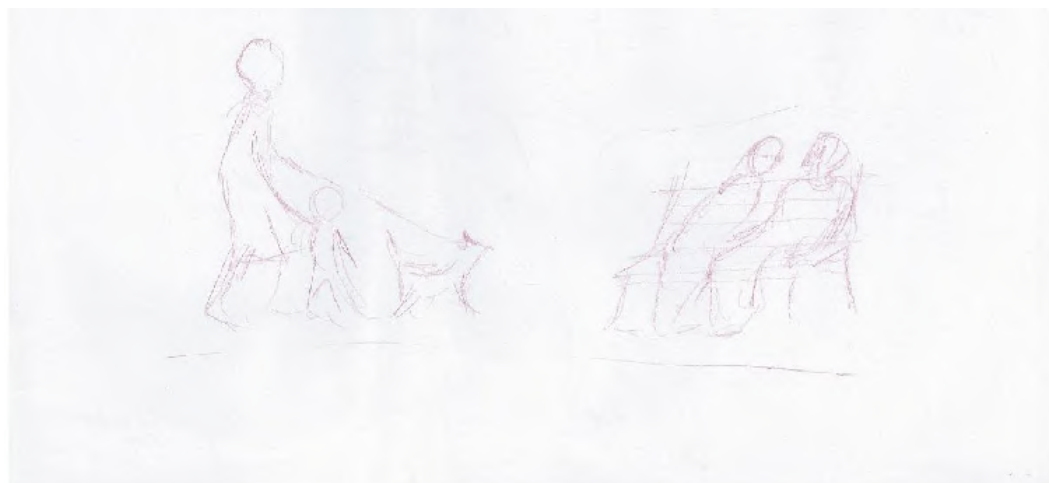
Source: community workshops

FIGURE 17: INTERPRETATION OF USE FROM SHARED PATHWAY



Source: community workshops

FIGURE 18: INTERPRETATION OF RECREATIONAL USE FROM SHARED PATHWAY



Source: community workshops

Concerns and potential resolutions

TABLE 9: CONCERNS AND POTENTIAL RESOLUTIONS - LANDOWNERS

Issue/Concern	Description	Proposed Resolutions/requirements
Snakes	Snakes are sun soakers and a risk to children	Signage to educate users
Mosquitoes	Swamp areas	Section off proposed walkway
Dogs	Dogs not under effective control or on leash - danger to others including children and wildlife	Clear signage for dogs to remain on leads
	Dog poo	Water bowls, poo bags and bins, policing by rangers Dog park area
		Dog user educations to encourage engagement with staff and users
	Dog fights	Owners to be aware of other users
	Impact on wildlife	Policing
		Implement a curfew for dogs
Vehicles: Segway, electric bike, pedal bike	Speed of cyclists	Users to follow road/traffic rules - awareness of bike speed
	Not keeping left	Users must give way to pedestrians - pedestrians to keep left
	Safety of pedestrians and cyclists	Consider surface type and materials in construction to discourage high speeds of cyclists. The use of gravel surface also looks more natural.
Business Parking	Limitation of customers	Consider lifting the restrictions
Safety/Security	People moving through the community without police being able to pursue	Safe pathway
	Currently not a safe place to walk/cycle	Secure dog proof fence with a locked gate to give property owners access to the track

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	Health of recreational users	Defibrillators
	Falling limbs	Signage regarding estimated time between stops along the track
	After dark usage	Brochure and map of track
	Unauthorised access to private jetties/ moored boats	Lighting
	Drownings. Who is responsible?	
	Theft	
	Security of jetties and boats	Security for jetties and boats
	Fire hazards from campfires	
	Campers along the roads	Safety barriers to be elevated for any part of the path close to roadways and low level points
Waste/rubbish	Who polices?	No bins to encourage users the practice of taking rubbish away, however bins at beginning and end
	waste/septic disposal	
Privacy issues	Landowners concerned with lack of privacy and security	Low priority. A shared pathway enables access, use and benefits the wider public. Landowners with properties adjacent to proposed path can plant a hedge or build a fence to the appropriate height.
	Shortcuts through private property	
Costs	Concrete track not aesthetically pleasing	Use of recycled 'filler' for concrete alternative
		Develop first stage using existing esplanade and enhancing existing infrastructure to get results
		Use Skinners Creek Path as example of more economic and extensive means of construction to expedite project
	Exceeding initial estimates	Upgrade town infrastructure instead
Signage	Currently little signage	More signage to keep left and dogs on leash, location of toilets, drinking water locations, estimate times, no motor bikes
		Selected signage points for river observation
Maintenance	Marina North-Franklin vandals	Encourage formation of 'Friends Groups' to assist with weed control and revegetation
	Vandalism	Consistent maintenance
	Maintaining crown land - mowing	Local school could assist with planting plants at the foreshore
		Boardwalk requires minimal maintenance
Environmental/Wildlife	Safety	Weave track away from sensitive areas near river and closer to the highway
	Cattle going to river	Full environmental assessment regarding wildlife in marshy areas
	Fencing costs to contain wildlife	
	Erosions to riverbank	

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Access/Parking	Public can't access a lot of the riverside	
	Access for fire brigade and emergency services	
	Already major issue from Huon end	
Value	Decrease in property value due to intrusion and loss of privacy	
Flooding	Concern for landowners	Close off path
	Climate change may cause river to rise and submerge low-lying path	Wet weather shelters
Illegal camping		Signage for no camping
Operation	24/7 access	
Infrastructure	Increase in traffic at entrance points	
	Access to water	Specific access points for boating activities
Public Liability Insurance	Who pays?	Steering committee with stakeholders involved?
Design	Boardwalk never designed wide enough to accommodate bikes, prams, people, electric wheelchairs	
	Hard edge concrete to fitting with the natural beauty of Huon	Refer to Lyminton Road walkway
	Location of water activity entry points	If concrete, use colour pigment
Levels of use	Tourists never spend enough time in area	
Public Amenities	Maintenance of toilets	Picnic areas

FIGURE 19: CONCERNS OF A SHARED PATHWAY



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Overall alignment

The community member and visitors who participated in the project's engagement activities were overwhelmingly in support of the Pathway.

Across both the workshop and online survey platforms, community members and visitors alike actively engaged in the activities and presented many new opportunities for community and visitor utilisation of the infrastructure, and were convinced of the many benefits the pathway would provide.

Although the landowner's workshop and comments in the survey were more focussed around concerns and impacts to individual property owners (as expected), many also recognised the benefits of the pathway to the wider community.

Additional consultation may be required with the landowners with land abutting the Crown Land where the pathway would be constructed, particularly during the detailed design phase of the Pathway. This would aid in allaying any residual concerns about safety, privacy, and perceived impact on wildlife.

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4. COST-BENEFIT ANALYSIS

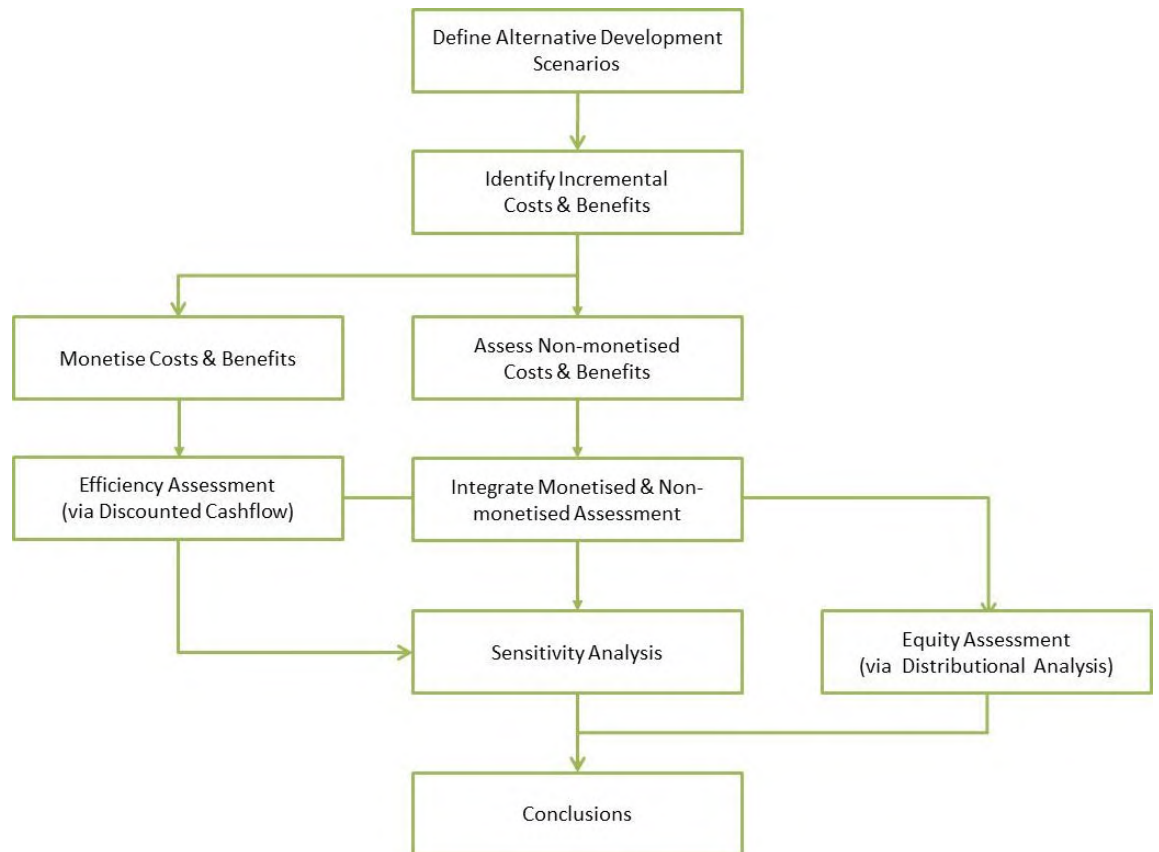
4.1 Introduction

A Cost-Benefit Analysis (CBA) assesses the merit of investing in a project, i.e. it assesses if it is worth doing when a broad societal perspective is taken. A CBA contrasts the project’s economic, social and environmental benefits with its costs, to establish if the benefits outweigh the costs. If this is the case, the project is considered worth doing from a broad community welfare (or economic efficiency) perspective.

4.2 CBA methodology

The methodology adopted by CBA is relatively generic in nature and is summarised in FIGURE 20.

FIGURE 20: CBA METHODOLOGY



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The application of this methodology must always be highly attuned to project and the context at hand though. For this CBA this meant undertaking the following steps:

- **Define the alternative impact on the community of the different scenarios;** one being business as usual (BAU), and one being the construction of a Pathway i.e. the project scenario.
- **Identify the incremental costs and benefits** of moving from the BAU to the project scenario/s taking a broad economic, social and environmental perspective. In doing this, it is important to:
 - separate the costs and benefits that stem from general trends from those that are associated with specific outcomes promoted by the project scenario/s, and
 - account for the difference between ‘real’ or ‘net’ costs and benefits, as opposed to transfer effects between different community groups within the Huon Valley.
- **Quantify and then monetise (convert to dollar values) the incremental costs and benefits** using available monetisation techniques, which include both market and non-market valuation techniques.
- **Assess the efficiency of moving towards the project scenario** using discounted cashflow analysis, which contrasts the incremental costs and benefits and then discounts all future (past) cost and benefits to present day values using appropriate discount rates. Appropriate performance measures, such as Net Present Value and Benefit Cost Ratio, are then calculated to gauge overall efficiency.
- **Test the sensitivity of these performance measures** by varying the underlying assumptions in the discounted cashflow analysis.
- **Assess non-monetised costs and benefits** recognising that some items are difficult to monetise due to their inherent intangibility and/ or because of a lack of information/ appropriate monetisation techniques.
- **Integrate the monetised and non-monetised costs and benefits** to make a fully informed conclusion about the likely efficiency of moving towards the project scenario/s.
- **Assess the equity of the project scenario/s** by examining the distribution of who pays and who benefits, and identify any segments of the community that disproportionately win or lose as a result of project implementation.

4.3 The Pathway CBA Analysis

Under this framework, the merit of the proposed initiative to develop a Pathway along the riverbank between Huonville and Franklin has been evaluated on an incremental basis (i.e. the initiative’s outcomes are tested in comparison to the outcomes that would occur under a business as usual (BAU) scenario). The BAU scenario is where the Pathway is not built.

Real values have been used throughout the analysis. This means that dollar prices have not been escalated for inflation overtime during the analysis period (30 years). The CBA has been undertaken from a Huon Valley LGA perspective, with consideration given to the impacts on the State of Tasmania overall.

For the analysis, a host of benefits and costs of the project option has been identified.

Based on SGS’s experience, available monetisation techniques and upon reviewing all community feedback received (workshops and online survey) the benefits and costs are included in the analysis either quantitatively or qualitatively, as shown in TABLE 10.

Items monetised are construction and maintenance costs, the benefits from additional visitor spending, the enjoyment gained by the community from a new recreational asset and the resulting health benefits from more active lifestyles. Items that will be included with rigour, but qualitatively (i.e. researched and explored but not given a monetary value due to lack of monetisation techniques or to avoid double counting with other items) are also included in the table.

TABLE 10: COSTS AND BENEFITS

Costs	Benefits
Quantifiable	
Construction costs	Visitor spending benefits from domestic and international tourism including the stimulation and growth of local businesses
Maintenance costs	Increased community use and enjoyment of the Huon River and foreshore area
	Active and healthy lifestyles (health cost savings)
Included qualitatively	
Loss of privacy for some residents, noting that the pathway will be on crown land	Town vibrancy and growth
Environmental impacts	Increased sense of community pride, identity and cohesion
Potential pathway misuse	Social inclusion via access for the disabled and elderly
	Environmental education outcomes
	Skills development
	Enhanced marketing and promotion value of the Huon River, Franklin and Huonville
	Improved business confidence and encouragement of private investment
	Wellbeing benefits
	Population increase

In addition, there is a range of concerns raised by the community for the Pathway that will be treated as risks to be managed, rather than being an actual cost of the Pathway. These include:

- User interactions with snakes, mosquitos and other wildlife.
- Nuisance caused by dogs
- Safety on the pathway, including collisions between cyclists and pedestrians, plus falls and drownings
- Security including theft and trespassing
- Loss of parking for local businesses

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Study Area

The proposed Pathway is located in the Huon Valley LGA (FIGURE 21). This is the 'study area' or the 'region' and is the area that will capture the benefits and costs of the proposal.

FIGURE 21: STUDY AREA



4.4 Quantified costs and benefits

Construction costs

The construction costs are based on the earlier technical and engineering report by pitt&sherry for the proposed pathway which included an estimation of the construction and maintenance costs.

A matrix of cost estimates was developed by pitt&sherry (see appendix) to cost a range of different factors including path width (2m or 2.5m), pathway material (gravel, stabilised gravel, bitumen and concrete) and decking material for boardwalks and bridges (treated pine and FRP (fibreglass reinforced polymer)). The estimated cost of the Pathway ranges between \$14.2 million for a two-metre-wide gravel path with FRP decking sections up to \$23.4 million for a 2.5-metre concrete path with treated pine decking. These costs include additional costs for construction related to access difficulties and additional foundation requirements.

For the analysis, to be conservative, the high cost of construction has been used (2.5m wide concrete pathway with treated pine decking)⁴. This also aligns with the pitt&sherry findings which recommended a concrete path for land-based sections as it offers superior durability, longer lifespan and lower maintenance costs. pitt&sherry also recommended the route align with the river which although maximising the views will also result in the greatest extent of boardwalk construction and much higher construction costs.

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⁴ It should be noted that the community expressed a strong preference for gravel and/or recycled material that would blend in well with the environment.

In the sensitivity analysis, other options will be considered including the cheaper upfront gravel option, which is preferred by the community.

In addition to the Pathway itself, SGS has added the costs for two floating viewing decks, three kayak landings, a six-car car park, a toilet block and signage. These additions are critical to elevating the experience from just a normal pathway for attracting high local usage and in attracting visitors from out of the local LGA.

Construction costs total \$24.6 million, as estimated by pitt&sherry and SGS (TABLE 11),

TABLE 11: CONSTRUCTION COSTS

Description	Source	Estimated cost
Pathway (high cost option)	pitt&sherry Feasibility Report (2019)	\$23,374,230
Toilet block (1)	pitt&sherry Feasibility Report (2019)	\$53,780
Carparking (1 six lot)	pitt&sherry Feasibility Report (2019)	\$10,800
Viewing decks (2)	Rawlinsons Construction Handbook (2020)	\$301,320
Kayak landings (3)	Rawlinsons Construction Handbook (2020)	\$138,360
Signage and other	SGS allowance	\$100,000
Contingency (2.5%)	Rawlinsons Construction Handbook (2020)	\$599,462
Total Capital Cost		\$24,577,952

Source: Waratah-Wynyard Council (2017)

The capital needed for construction is considered a cost to society as the money and resources used have an opportunity cost in that they could have been used elsewhere.

Maintenance costs

Factors which influence maintenance costs include:

- Vegetation and debris
- Root infiltration/Pavement lifting
- Cracking
- Drainage
- Erosion.

As advised by pitt&sherry, the maintenance costs associated with gravel paths and are much higher than for concrete. Gravel or bitumen paths are prone to cracking and weed or grass penetration which exacerbates breakdown of the surface. In past studies, SGS has assumed that maintenance costs for gravel bicycle paths (rail trails) per annum are equivalent to 5% of the option's initial capital cost⁵.

For the concrete path (the project option) maintenance costs have been set at 2% of initial capital costs, which equates to \$492,000 per annum.

A life span of 40 years is generally assumed for concrete paths (pitt&sherry) which is twice what can be assumed for gravel. This means that the concrete path will not need to be replaced within the project analysis period (30 years).

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⁵ Evaluation of Regional Development Victoria's Regional and Rural Trails Program and Development of an Investment Framework (2015), Marsden Jacob Associates.

Visitor spending benefits

An aim for Huon Valley Council is to facilitate an increase in visitors and the economic yield the region receives from tourism by enticing tourists to visit, to stop in the towns, and preferably to stay overnight as opposed to returning to Hobart. Adding new experiences, such as the Pathway, to the tourism offer of the Huon Valley is important to do this.

The Huon River is currently an underutilised tourism asset for the region. By adding more attractions, the pathway can help drive a shift in the way visitors engage with the Huon Valley, helping to transform it from a day trip destination to one in which visitors seek extended stays, even if it's just a few extra hours.

The development of the pathway will allow the region to capture a greater market share by making the towns of Huonville and Franklin more attractive to visitors, increase total tourism spending in the State by providing a range of activities along the foreshore that link into the centre of the towns. With added expenditure, the community in the Huon Valley has the potential to leverage the pathway to support the growth of the local tourism businesses including accommodation providers, outdoor experiences, food, cider and wine experiences, and cultural/historic attractions.

This is supported by the results of the community survey. A large majority (85%) of survey respondents expect that the pathway could attract additional visitors and tourists to the Huon Valley. Of the survey respondents who were visitors to the Valley, 91.5% stated that the pathway would entice them to return to the Huon Valley in the future. Further, 58% the visitor respondents stated that if the pathway already existed, they would have extended their visit to the Huon Valley.

Increase in overall visitation

A more inviting tourist offer with an increased diversity of activities will increase the number of visitors travelling to the Huon Valley benefiting the local economy. This will include visitors from elsewhere in Tasmania (intrastate) and interstate arrivals.

This means more visitors stopping in Huonville and Franklin to experience the Pathway or staying overnight.

Since 2015, TVS data⁶ (Table 12) shows that the share of tourists to Tasmania that visit Huonville has been falling, from 14 per cent in 2015/16 to 11 per cent in 2018/19. The situation is similar in Dover and Cygnet, also in the Huon Valley.

TABLE 12: SHARE OF TOTAL VISITORS TO TASMANIA WHO VISIT TOWNS IN THE HUON VALLEY

	Oct 2015- Sep 2016	Oct 2016- Sep 2017	Oct 2017- Sep 2018	Oct 2018- Sep 2019
Huonville	14.10%	13.40%	12.10%	11.30%
Dover	4.60%	4.40%	3.70%	3.50%
Cygnet	7.90%	8.10%	6.80%	6.80%

Source: Tourism Tasmania (2020). Tasmanian Visitor Survey Results. Places Visited

For the project option (construction of the pathway) it has been assumed that forecast visitor growth in the Huon Valley will match that of Tasmania, meaning that Huonville's market share is maintained instead of falling. Given that tourist arrivals to Tasmania are forecast to grow at 2.8 per cent per annum⁷, this means tourism in the Huon Valley will grow at the same rate. Without the pathway growth is assumed to be at half the rate, which sees Huonville's visitor numbers growing but its market share falling by around 0.2 percentage points per annum.

⁶ Tourism Tasmania (2020). Tasmanian Visitor Survey Results. Places Visited.

⁷ Tourism Research Australia (2019). State Tourism Forecasts

Not building the pathway sees the Huon Valley miss out on an opportunity to attract more visitors and to capitalise on the growth of tourism to the state.

In addition, Tasmanians will take more intrastate holidays to the Huon Valley if the pathway is built. Previous analysis on natural areas in Tasmania by SGS⁸ revealed that Tasmania's make up around a quarter of visitation to Tasmania's natural heritage site. It has been assumed that a similar ratio applies to the pathway (excluding local Huon Valley resident use). In Tasmania it is forecast by Deloitte that intrastate visitation will grow at 3.4 per cent per annum to 2025, and 2.2% per cent per annum from 2026⁹. With the pathway it assumed that the Huon Valley matches these growth rates, and only receives half that growth rate without the pathway. It is assumed that ½ complete a day-trip, while the other half stay at least one night in the Huon Valley.

As part of the sensitivity testing, the additional benefit of increased visitation is excluded to consider the impacts on the result if the Pathway doesn't attract new visitors.

Increased duration of stay

A benchmark analysis was performed comparing Huonville with five other small Tasmania towns, with populations less than 3,000. Importantly these towns are all located on, or near, highways and visitors can choose to pass through onwards to other destinations or stop.

This analysis is shown TABLE 13, which uses a four-year average, and shows that compared to other similar towns Huonville has a higher than the average number of visitors who pass through without stopping (48% compared to 38%), and a lower than average number of visitors who decide to stay overnight (18% to 40%). Though, the share of people who stop in Huonville is higher than the other towns, possibly linked to the town's situation as the gateway to the Huon Valley.

With the development of the pathway it has been assumed that Huonville (and by extension Franklin) will capture a greater number of tourists and will fall more in-line with the benchmarked average of tourist towns in Tasmania, specifically under the Project Option:

- It has been estimated that there will be a reduction in visitors who pass through without stopping from 34% to 28%, halfway to being in-line with the benchmarked average.
- A portion of the visitors who would have once stopped and looked around will now spend time staying overnight in the town. The increase in tourists who stay overnight is from 18% to 24%, closer to the benchmarked average, but still below, and
- The number of overall visitors who simply stop remains overall the same, but above the benchmarked average.

TABLE 13: VISITOR CAPTURE RATE BY SELECTED SMALL TASMANIAN TOWNS (2016-2019 AVERAGE)

	Population (ABS suburb)	Average interstate and international visitors per annum	Passed through without stopping*	Stopped*	Overnight*
Swansea	866	184,237	34%	34%	32%
Bicheno	943	192,904	19%	36%	46%
St Helens	2,070	169,175	17%	36%	47%
Bridport	1,266	65,122	30%	40%	30%
Stanley	1,568	101,913	12%	43%	45%
Average	1,343	142,670	22%	38%	40%

⁸ Tasmanian Wilderness World Heritage Area Masterplan

⁹ Deloitte (2020). Visitor Demand Forecasts for Tasmania to 2030. Prepared for Tourism Tasmania.

Huonville (BAU)	2,714	161,814	34%	48%	18%
Huonville (Project Scenario)		161,814	28% (-6 points)	48% (+0%)	24% (+6 points)

Source: Tourism Tasmania - Tasmanian Visitor Surveys (2016 to 2019). ABS (2016), Census of Population and Housing
*Average of four years, September 2016 to September 2019

As a result of these changes, the capture rates of tourists for Huonville falls more in line with other small towns in Tasmania popular with tourists. In total the number of visitors stopping and/or staying overnight increases by 9,900 per annum due to pathway and the increased activity it brings.

Under the Project Scenario, it has been assumed that those that now stay overnight add one-night to their trip to Huon Valley. This is a conservative assumption as it could be argued that due to the enhanced amenity and attractiveness of the foreshore, plus any additional activities enabled, visitors may actually increase the length of their stays further. None-the-less visitor nights increase from 146,300 in 2019 to 156,100 after the Pathway is opened (one year after the redevelopment is completed), before continuing to rise in-line with forecast State growth in tourism.

Impact on visitor spending

Spending by visitors has been calculated using Tourism Research Australia's Local Government Area Profile for Huonville (four-year average 2015-2018)¹⁰. Each visitor night has assumed to result in 80% of the average daily spending (\$158 for commercial accommodation) by visitors to Huon Valley (all reasons) to be spent in Huonville/Franklin. For day-trippers, it has been assumed that 50% of average tourists daily spend (\$94) specifically on food and drinks, fuel, shopping and entertainment will be spent in Huonville/Franklin. These calculated totals are shown in TABLE 14.

TABLE 14: EXPENDITURE IN HUONVILLE/FRANKLIN BY VISITOR TYPE

	Passed through without stopping	Stopped and used the Pathway	Per visitor night
Expenditure	\$0	\$47.10	\$126.43

Source: Tourism Research Australia (2016). Local Government Area Profile for Waratah-Wynyard -2015

Results of increased tourist activity

An overview of how these assumptions impact visitor numbers and expenditure in Huonville/Franklin over the analysis period is shown in TABLE 15.

TABLE 15: ANNUAL TOURISM EXPENDITURE BY INTERSTATE AND INTERNATIONAL VISITORS - BAU VS PROJECT OPTION

	2020	2025	2030	2040
Visitor nights (BAU)	156,136	169,655	184,414	211,920
Visitor nights (project option)	156,136	184,512	217,762	287,021
Day tourists (BAU)	80,907	85,534	92,975	106,843
Day tourists (project option)	80,907	87,912	103,754	136,753

¹⁰ inflated to 2020 prices using the ABS Consumer Price Index

Intrastate visitation* (BAU)	59,261	64,175	68,936	76,905
Intrastate visitation* (project option)	59,261	66,339	76,479	95,071
Total visitor expenditure (BAU)	\$28,693,309	\$31,046,813	\$33,676,381	\$38,498,796
Total visitor expenditure (project option)	\$28,693,309	\$33,225,006	\$39,054,990	\$50,979,061
Annual increase in tourist expenditure (project option minus BAU)	\$0	\$2,178,192	\$5,378,609	\$12,480,265

*only includes intrastate visitors interested in nature-based recreation

Calculating visitor spending benefits – operating and labour surplus

As shown above (TABLE 15) the pathway development is expected to attract additional visitors to Huonville/Franklin that will spend money in the towns. The benefit, however, is not the actual amount visitors spend, but the difference between what visitors pay and the opportunity costs to provide those goods and services.

For every \$100 spent by visitors in tourism-related industries (such as accommodation or cafes, restaurants and takeaway food services) approximately \$19 (or 19%) can be considered as operating surpluses/profits for local businesses (see Appendix A for more detail). Assuming that 1/2 of the operating surpluses will remain in the Huon Valley, this leaves a total of \$9.50 per every \$100 spent ($\$19 \times 1/2$).

Turning to labour surplus from the operation of the businesses in Huonville/Franklin, the ABS Tourism Satellite Accounts show that 29.5% of direct tourism output goes towards compensation of workers (wages) in tourism-related industries (see Appendix A). Therefore, for every \$100 spent \$29.50 is going towards the wages of local residents. A significant portion of this labour would be otherwise employed and the rest would have some opportunity cost including loss of leisure. Assuming that one-third of the labour would otherwise be employed, and the balance would have an opportunity cost of half the wage received, then the total labour surplus would be $\$29 \times 2/3 \times 1/2 = \10 .

All up for every \$100 of increased tourism expenditure, \$19.50 (\$9.50 operating surplus + \$10 labour surplus) can be considered as a benefit to the Huon Valley.

This benefit accrues from the end of the construction phase through to the end of the 30-year analysis period. This benefit does not include spending by locals, nor intrastate visitors from the rest of Tasmania as this expenditure is assumed to not involve additional spending in the region and therefore is simply a transfer of spending with-in the region and Tasmania, not new spending.

The total calculated annual impact (in selected years) of tourism on the Huon Valley due to foreshore development is shown in TABLE 16.

TABLE 16: TOTAL IMPACTS OF INCREASED TOURIST EXPENDITURE

	2020	2025	2030	2040
Total - Increased tourism expenditure benefits	\$0	\$424,747	\$1,048,829	\$2,433,652

It's important to note that the benefits are not restricted to businesses near the Pathway as the development will lead to improved vibrancy throughout the towns supporting business turnover at nearby retail, accommodation and food and beverage operations.

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Community use and enjoyment benefits

The development of the pathway will provide benefits to the Huonville/Franklin community in the form of increased community leisure activity. The ABS outlines the importance of leisure time to Australian's arguing that leisure time allows people to recover from the pressures of work and other commitments, to bond with family and community members, to pursue their interests, and to reflect on their life direction and meaning.¹¹

Individuals value their leisure time, even if they are not paid for it. According to the Queensland Treasury¹² half of an appropriate hourly wage rate is assumed to be a reasonable proxy for the value of leisure time; this approach is also used by the NSW Treasury.

To calculate the value of leisure time ABS Census data¹³ was used to calculate average weekly earnings of paid workers in Huonville/Franklin and the number of hours worked. This revealed that the workers in Huonville/Franklin earn \$4.4 million a week, working 114,400 hours. This results in an average hourly wage in the towns of \$41.50 (inflated to 2020 terms using the ABS Wage Price Index) dividing this by two we have a leisure value of \$20.80 per hour. To calculate the annual value of the leisure time the value per hour is multiplied by the additional number of hours that are spent at the foreshore by the community.

Under the business as usual scenario recreation will remain at present-day levels, only rising with forecast population growth for the Huon Valley.

Future use once the Pathway is installed is calculated by taking the local population in the Huonville/Franklin SA2 (which also includes Ranelagh, Glen Huon and Crabtree) and applying the results of the community survey, which found 37% of the community would use the Pathway a few times a week, 30% a few times a month and 14% a few times a year.

It has been assumed that on average casual users spend half an hour using the Pathway per visit (many will stay much longer). For the CBA project option, the number of hours of recreation use has been halved to account for the fact that some of the leisure hours would have been spent elsewhere if the Pathway is not constructed.

Hours of recreation use also increases with population growth, which is projected by the Tasmanian Treasury to be 1.1% per annum, on average, to 2050 in the Huon Valley.

The total calculated annual impact (in selected years) of increased recreation time in the Huon Valley due to pathway is shown in TABLE 16.

TABLE 17: TOTAL IMPACTS OF COMMUNITY LEISURE

	2020	2025	2030	2040
Local population	9,519	9,945	10,620	11,848
Increased high-quality community leisure time (hours per annum)	0	145,359	156,928	175,070
Annual benefit	\$0	\$3,050,603	\$3,257,562	\$3,634,161

On average, each resident in the local area will spend an additional 0.3 hours per week recreating due to the pathway. Some residents will spend much more time than this on the Pathway, while others won't use the Pathway at all.

The value of leisure that tourists experience has not been included as part of the benefit of leisure. This is due to this benefit accruing to people who live outside the Waratah-Wynyard community and to avoid the possibility of any double counting.

¹¹ Australian Bureau of Statistics (2015) Frameworks for Australian Social Statistics, Culture and Leisure

¹² Queensland Treasury (2016). Guidelines for estimating the net benefits of regulatory reforms

¹³ 2016 Census - Counting Employed Persons, Place of Enumeration

Active and healthy lifestyles

Besides the leisure benefits, there will also be health benefits to the more active local community. Residents will have the opportunity to take advantage of the enhanced facilities leading to healthier, happier lifestyles as physical activity becomes more attractive through a desirable urban environment. The walking, cycling, and kayaking amenities of the redevelopment support increased physical activity which has tangible mental and physical health cost savings.

Active and healthy lifestyle benefits are calculated using the same increase in users and time spent at the Pathway as shown in TABLE 17. The health benefits of being active lead to health costs savings of \$5.56 per hour¹⁴. To calculate the annual benefit, the health cost savings per hour is multiplied by the amount of time the community spends at the foreshore exercising. This leads to the annual impacts of decreased health costs as shown in TABLE 18

TABLE 18: HEALTH COST SAVINGS GENERATED BY ACTIVE LIFESTYLES

	2020	2025	2030	2040
Local population	9,519	9,945	10,620	11,848
Increased high-quality community leisure time (hours per annum)	0	145,359	156,928	175,070
Annual benefit	\$0	\$825,890	\$872,324	\$973,172

4.5 Project performance – monetised costs and benefits

In line with convention, the cost-benefit analysis has been undertaken on an ‘incremental’ basis. This measures the performance of developing the pathway (project scenario) against the business as usual case by subtracting costs and benefits that would have occurred regardless of the development.

Two performance measures are subsequently generated:

- Net Present Value (NPV), and
- Benefit Cost Ratio (BCR).

Details on how these measures are calculated and how they should be interpreted are summarised in Table 19.

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¹⁴ Based on Trubka, R, Newman, P and Bilsborough, D (2008). Assessing the Costs of Alternative Development Paths in Australian Cities. Fremantle: Curtin University Sustainability Policy Institute. Report commissioned by Parsons Brinckerhoff Australia. Inflated to 2017 prices using ABS CPI.

TABLE 19: INTERPRETATION OF PERFORMANCE MEASURES

Performance measure	Estimation method	Decision rule
Net Present Value (NPV)	A number generated by deducting the present values of the stream of costs from the present value of the stream of and benefits, with the present value of costs and benefits determined by using an appropriate discount rate.	Accept scenario if it has a positive NPV Reject scenario if it has a negative NPV, and The greater the NPV the better.
Benefit Cost Ratio (BCR)	Ratio of discounted present-day benefits over discounted present-day costs.	Accept scenario if the BCR exceeds one Reject scenario if the BCR is less than one, and The greater the BCR the better.

Source: SGS Economics & Planning 2018

CBA results

Over the evaluation period, 2020 to 2050, the development of a pathway between Huonville and Franklin will contribute positively to the overall welfare of the Huon Valley community.

Both the Net Present Value and Benefit Cost Ratio criteria are met. The partial analysis results are shown in Table 20 which outlines the present value (PV) of the costs and benefits quantified. In addition to the quantifiable costs and benefits, there are benefits that could not be quantified but are not necessarily less important (Section 4.6).

The discount rate used in the analysis is 7%, in line with common practice in CBA.

TABLE 20: CBA PERFORMANCE RESULTS

Project CBA	Summary Results	Share
Discount Rate	7% Real Discount Rate	
PV Construction costs	\$20,765,000	84%
PV Maintenance costs	\$3,900,000	16%
Total Costs	\$24,665,000	100%
PV Visitor spending benefits	\$13,922,000	25%
PV Local recreation and enjoyment	\$32,720,000	59%
PV Health and wellbeing benefits	\$8,760,000	16%
Total Benefits	\$55,402,000	100%
Benefit-Cost Ratio (BCR)	2.25	
Net Present Value (NPV)	\$30,737,000	

The Huon Valley 2020 Community Plan identified Strategic Objectives aimed at fulfilling each of the eight stated Future Directions for the Valley. These Future Directions include:

- Build health and well being
- Enhance recreational opportunities.

As revealed in the CBA, these benefits are the largest from the pathway.

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The largest benefit from the project stems is the community recreation and enjoyment allowed by having a high-quality recreational asset developed in the community. Community use also leads to health and wellbeing benefits, which is the second-largest benefit category.

Visitor spending benefits is the smallest monetised benefit, but SGS were deliberately conservative with this benefit assuming no new visitors to the region, just longer stays for existing visitors due to use of the Pathway. This benefit aligns with Council’s objectives to enhance and develop the Huon Valley as a destination for high quality tourism experiences and services.

These benefits (and costs) are tested next via sensitivity analysis.

Sensitivity analysis

By necessity, the CBA involves assumptions and estimates about current and future economic, social and environmental conditions including community and visitor used and costs of construction and maintenance. While using the best available information, there may be a level of uncertainty associated with these assumptions and estimates.

Sensitivity testing is done to determine how sensitive the option outcomes are to the assumptions and parameters. To test the sensitivity of the outcomes the underlying assumptions are varied. This testing provides robustness to results in that a range of different outcomes have been considered.

Five tests have been performed:

1. A lower (4%) discount rate
2. A higher (10%) discount rate
3. A lower capital cost scenario with 2.5m wide stabilised gravel path with FRP boarding and extras (\$19 million) but with higher maintenance costs (5% of capital) due to the use of gravel for the pathway. A gravel pathway was the preferred option of the community.
4. A low community use scenario (hours of use reduced by a half) to account for possible self-selection bias (see text box)
5. A more pessimistic visitor scenario, where the Pathway does not attract any new visitors to the region raising above BAU, only extended stays for existing visitors.

The results of these sensitivity tests are shown in the table below. The results show that the project remains beneficial even if the assumptions are dramatically altered (e.g. reducing community use by 50% or no increase in visitor numbers). This is because the proposal generates benefits across multiple categories due to its role as both a recreational asset for the local community, but also a tourism infrastructure asset.

Further, the preferred community option (a gravel pathway) outperforms the more expensive concrete option, though more accurate maintenance cost estimates would need to be sourced for this finding to be definitive.

SELF-SELECTION BIAS

Self-selection bias is a common issue that arises when undertaking surveys of a small sample of the study population. It arises where survey respondents participate voluntarily; that is, they decide whether they complete the survey of their own accord. Often, the decision to participate in the study is correlated with the topic being surveyed.

In the context of our analysis, respondents elected to respond on their own accord and hence our survey results suffer from self-selection bias. It is reasonable to expect that those who chose to respond to the survey were more likely to be supportive of the Pathway, and those that were not supportive were more likely to refrain from completing the survey. Hence, the survey likely overestimates the community’s propensity to use the Pathway. To account for this a low community use sensitivity test has been performed.

TABLE 21: RESULTS OF SENSITIVITY TESTING OF KEY ASSUMPTIONS

Project CBA – sensitivity testing						
TEST	Project results	Test one	Test two	Test three	Test four	Test five
PV Construction	\$20,765,000	\$22,287,000	\$19,389,000	\$16,126,000	\$20,765,000	\$20,765,000
PV Maintenance	\$3,900,000	\$5,300,000	\$3,000,000	\$7,600,000	\$3,900,000	\$3,900,000
Total Costs	\$24,665,000	\$27,587,000	\$22,389,000	\$23,726,000	\$24,665,000	\$24,665,000
PV Visitor spending	\$13,922,000	\$23,804,000	\$8,613,000	\$13,922,000	\$13,922,000	\$3,123,000
PV Local recreation	\$32,720,000	\$49,395,000	\$22,862,000	\$32,720,000	\$16,360,000	\$32,720,000
PV Health and wellbeing	\$8,760,000	\$13,230,000	\$6,120,000	\$8,760,000	\$4,380,000	\$8,760,000
Total Benefits	\$55,402,000	\$86,429,000	\$37,595,000	\$55,402,000	\$34,662,000	\$44,603,000
Benefit-Cost Ratio (BCR)	2.25	3.13	1.68	2.34	1.41	1.81
Net Present Value (NPV)	\$30,737,000	\$58,842,000	\$15,206,000	\$31,676,000	\$9,997,000	\$19,938,000

4.6 Non-monetised costs and benefits

Loss of privacy for some residents

The scope of the project states that the pathway is to be located wholly within the public reserve running along the bank of the Huon River. The reserve is in Crown land and therefore in public ownership.

The presence of a pathway for pedestrians and cyclists may be a concern for some residents. The community survey revealed that concerns for nearby residents typically relate to noise, safety and impact on privacy. There are 13 dwellings located between the highway and the river with the closest of these located between 6 m and 15 m from the edge of the reserve where the Pathway will be constructed.

Though this is a cost to these residents, they were enjoying private benefits from a public resource, which they are not legally entitled to. The loss of this private enjoyment of a public good should therefore be largely discounted. Nonetheless, Council should consider reasonable measures to mitigate adverse effects on the residents along the pathway.

Potential pathway user misuse

Some survey and workshop participants were concerned about the potential for pathway users to misuse the facility, including allowing dogs off the lead, dog waste not being picked up by owners, littering, vandalism, excessive speed from cyclist and unauthorised access onto private land (particularly during times of flood).

Environmental impacts

The construction of the Pathway will likely have a small environmental impact due to the removal of vegetation and other construction activities. The Pathway is located by the Huon Estuary Marine Conservation Area which is gazetted under the Nature Conservation Act 2002. This status reflects the significant ecological values present within the estuary, including habitat for threatened species and outstanding water quality. The riverbank itself though is degraded or cleared in many areas.

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The proposed pathway will allow users to enjoy the natural scenic vistas associated with the reserve and will provide access for kayaking and other recreational uses. Construction next to the river will require the implementation of appropriate soil and water management measures to prevent impacts on these values.

As advised by pitt&sherry (2019) there is a very small number of records for species listed as threatened under the Environment Protection and Biodiversity Conservation Act 1999 within the reserve. However, given the disturbed nature of the riverbank, it is not considered that this will be an issue for construction. The species recorded to date are mobile species using a wide range of habitats which are unlikely to be permanently displaced by the construction of the pathway.

Survey and workshop participants noted the possibility of negative interactions with natural fauna, particularly snakes who may utilise the pathway during particular times of the year.

Increased sense of community pride, identity and cohesion

The pathway has the opportunity to be a cultural anchor point for the Huon Valley community, creating an enhanced sense of community pride. Huon Valley community members noted that their sense of pride for the town would be enhanced by having the ability to introduce the Huon River to visitors. Many survey and workshop participants noted that the pathway infrastructure would help redefine the local community identity to be one that is more connected and in tune with the Huon River. Having more social interactions along the pathway would also aid in social cohesion, with connections developed on the pathway being reinforced as time goes on.

Social inclusion via access for the disabled and elderly

Generally, pathways, footpaths and the like are required to be constructed to allow access for all people. Not all areas of the reserve are suitable for access for persons with a disability due to the slope required to access the riverbank (pitt&sherry, 2019). There will be, however, sections of the alignment which can be readily accessed from car parking areas or the main foreshore to provide access to these groups.

Environmental education outcomes

Walking tracks and kayaking present a unique opportunity for education. People of all ages can learn more about nature, culture or history. They can give people a sense of place and an understanding of the enormity of past events and an understanding of what is at stake if the environment is not properly cared for.

Nature-based recreation plays an important role in the environmental movement, as they can act as an active means for teaching people about the natural environments. They can also play a key role in securing lands for environmental conservation. The pathway is located by the Egg Islands, which has a high conservation value.

The increased awareness of immersion in nature leads to more respect for the environment, and a desire to protect it, across a wide range of cohorts.

Skills development

The development, by attracting greater tourist expenditure, will enable the expansion of the employment market in both depth and scope through the availability of a greater variety of occupations such as accommodation managers, chefs, waiters, retail workers or tour operators (as examples). This is critically important for the Region in particular, for a variety of reasons, including reducing dependence on a few main industries and new employment for young people to entice them to remain in the Region.

Marketing and promotion of the region

Travel magazines and blogs, newspapers and other media will likely report on the development of the Pathway, and the quality experience provided.

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Another factor is that travel is increasingly connected, social and mobile. The prolific adoption of personal mobile devices, and the corresponding explosion of social media activity, has had profound impact on the travel industry across the world. This affects service delivery for international travellers, but also how prospective travellers seek out and share information about travel experiences. Its effect is evident in Tasmania including the TWWHA. At iconic spots such as at Dove Lake, Cradle Mountain visitors line up for the 'selfie' shot.

With viewing platforms provided on the pathway and views across the River and natural environment, the profile of the Huon Valley can be raised via this sharing of travel information online.

Improved business confidence and encouragement of private investment

Another benefit of this is that the project will foster greater town vibrancy and attract a larger pool of customers to businesses. This will likely lead to increased business confidence and increased investment in the towns of the region including Huonville and Franklin.

Opportunities for businesses identified in the community survey include for equipment hire companies (bikes, kayaks etc), pop up cafes and other mobile food and beverage businesses.

In particular, there is an opportunity for a major development at the Franklin end of the pathway. At the Franklin foreshore, the Franklin Foreshore Redevelopment was proposed that included a hotel, microbrewery, café, tenancies and museum. The estimated capital investment was \$5.5 million to construct/redevelop from existing sheds and buildings; however, this project is yet to materialise. The construction of the Pathway makes it more likely that this and other similar proposals will be more likely to succeed.

Wellbeing benefits

Many survey and workshop participants noted the wellbeing benefits that would be enjoyed by using the pathway. The community noted these relate to the ability to enjoy the Huon River in a passive way, by connecting more to nature, and by having an increased sense of inclusiveness.

Population increase

The improved vibrancy and economic performance could lead to the Region becoming an even more desirable place to live increasing the population, which then has further economic benefits. It also increases the rates revenue for council who can then provide more and higher quality services to the community.

4.7 CBA Recommendation

The cost-benefit analysis was undertaken to assess the development of a pathway along the Huon River, linking Huonville and Franklin in Tasmania's Huon Valley. The CBA analysis revealed that the project passes the NPV and BCR criteria, and hence, will provide an economic benefit to the Huon Valley, and by extension, Tasmanian community, and is worth pursuing from a broad community benefit point of view.

The most significant benefits are generated from the community recreation and enjoyment allowed by having a high-quality recreational asset developed in the community. Community use also leads to health and wellbeing benefits, which is the third-largest benefit category. The other major benefit is the visitor spending benefits enabled by the pathway increasing the desirability of the Huon Valley as a visitor destination.

Furthermore, there is a range of other benefits including leisure benefits for disabled and elderly residents, marketing benefits and improved business confidence and private investment that remain unquantified. This means that the true NPV and BCR lie higher still than that calculated.

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In total, development has a quantified net present value of \$30.8 million over the thirty-year analysis period, and a benefit-cost ratio of 2.25 when the community costs are compared the community benefits. The project also passes a range of sensitivity tests, adding robustness and reliability to the results.

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5. ECONOMIC IMPACT ASSESSMENT

This section presents the findings of an economic impact assessment of the proposed Pathway on the local Huon Valley economy in terms of contribution to gross regional product and local employment.

An economic impact assessment (EIA) differs from the CBA in that provides no judgement on the overall benefit of the project in comparison to the costs. EIA does not assess the merits of a project but traces how project implementation influences overall economic activity levels over time, e.g. in terms of jobs creation and income generation.

The economic impacts are considered in two phases, the economic stimulus generated from the construction effort (the construction phase) and the visitor attraction, or tourism phase. The Pathway can be a new and well-known destination for the Huon Valley attracting new visitors to the region. This visitor expenditure generates new economic activity. The tourism phase also includes the stimulus caused by Pathway maintenance.

5.1 The assessment model

An economic impact assessment (EIA) is utilised to estimate the economic impact of the stimulus generated by the Pathway which results in changes to total economic activity levels after measuring the cumulative effects of all the buyer/ supplier transactions.

The steps in undertaking an EIA include:

1. Isolating how the Pathway will stimulate the Huon Valley economy. These are direct impacts and include the capital costs of construction and maintenance and the money spent by new visitors at stores, other attractions, accommodation providers and hospitality venues
2. Generating region-specific econometric models and subsequently deriving economic multipliers for major industry groups, i.e. construction, food and beverage services, arts and recreation services and so on.
3. Applying these multipliers (by relevant industry group) to the direct impacts to estimate total regional impacts in terms of value-added and employment. The modelling represents how money 'flows' through the economy. For example, a visitor to the Huon Valley to use the Pathway may not have to pay an entry fee but will purchase meals and beverages, equipment, petrol, and perhaps even stay the night, visit other attractions or do a tour. This money accrues to the business but also their suppliers. This chain of transactions generates further economic activity in the Huon Valley economy.

Consideration of the economic impacts is in terms of value-added to gross regional product (GRP) and employment (full-time equivalent jobs). Value-added is a broad measure of the income effect. This measure essentially reflects the sum of wage income and business profit generated. Employment is measured as annual full-time equivalent jobs (FTE).

The impacts are considered from a Huon Valley Council local government area perspective, for the next ten years (2020 to 2030).

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5.2 Construction phase

Economic impacts are generated during the construction phase through the demand for materials, labour and services, driving flow-on effects through the regional economy.

As outlined in the CBA, construction costs total \$24.6 million, as estimated by pitt&sherry and SGS (TABLE 11).

This direct stimulus (capital costs of construction) captured in the Huon Valley economy, can be expected to generate \$4.5 million in direct regional value-added and support 32 additional FTE jobs over the length of the construction works. If the construction effort takes two years, this represents 16 full-time jobs per annum worth of effort. These results are based on the assumption that 80 per cent of contracts for labour, services and materials are awarded to suppliers in the Huon Valley. If local suppliers are used less, the economic impacts will be lower.

In addition to the direct impact, supplier and contractor linkages lead to flow-on effects as the stimulus circulates through the local economy. These flow-on effects are also shown in the table below. When the flow-on effects are incorporated, this stimulus translates to a combined (direct and indirect) economic impact of:

- Output \$43.6 million
- Value-added to GRP \$7.8 million
- Employment 65 FTE annual jobs supported

TABLE 22: TOTAL CONSTRUCTION IMPACTS – HUON VALLEY LGA

Source of Stimulus	Output	Value-added to GRP	Employment (FTE)
Direct	\$19,700,000	\$4,500,000	32
Flow-on impacts	\$24,000,000	\$3,300,000	33
Total	\$43,600,000	\$7,800,000	65

Source: SGS Economics and Planning, 2020

5.3 Tourism phase

The tourism phase for the project is assumed to begin in 2023, after the completion of the pathway. The tourism phase includes the stimulus generated from the maintenance of the pathway and increased visitor expenditure.

Track maintenance

Maintenance of the pathway is an economic stimulus contributing to GRP and employment through the purchase of materials and services from suppliers and the use of local labour.

As outlined in the CBA section, for the concrete path (the project option) annual maintenance costs have been set at 2% of initial capital costs, which equates to \$492,000 per annum.

This direct stimulus is again captured in the Huon Valley economy. The stimulus can be expected to generate \$160,000 in direct value-added and support 3.6 additional FTE jobs per annum. Again, it is assumed that 80 per cent of contracts for labour, services and materials are awarded to suppliers in the Huon Valley. If local suppliers are used less, the economic impacts will be lower.

When the flow-on effects are incorporated, this stimulus translates to a combined (direct and indirect) economic impact of:

- Output \$790,000 per annum
- Value-added to GRP \$180,000 per annum
- Employment 3.8 FTE annual jobs supported

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TABLE 23: TOTAL MAINTENANCE IMPACTS, PER ANNUM – HUON VALLEY LGA

Source of Stimulus	Output	Value-added to GRP	Employment (FTE)
Direct	\$490,000	\$160,000	3.6
Flow-on impacts	\$300,000	\$20,000	0.2
Total	\$790,000	\$180,000	3.8

Source: SGS Economics and Planning, 2020

Visitor spending

As outlined in the CBA and survey results, visitor numbers and visitor nights can be expected to increase in the Huon Valley due to the Pathway, above what can be expected if the Pathway is not built. These changes increase the amount of visitor expenditure in the local economy. When people purposefully plan a trip to the Huon Valley because of the pathway, they will visit other attractions, spend money at local accommodation providers, hospitality venues and retail stores, and may hire bicycles or kayaks, or undertake tours.

As shown in TABLE 15 in the CBA section, this increases annual visitor expenditure in the local economy by \$2.2 million by 2025, rising to \$5.4 million by 2030. The increase over time is due to the Huon Valley increasing its market share of total visitation and visitor nights. Visitor nights and the number of visitors grow over time with or without the project.

By 2030, the increase in tourist expenditure can be expected to generate \$2.6 million in direct value-added and support 44 additional FTE jobs per annum in the Huon Valley's hotels, restaurants, cafes, stores, visitor attractions and other places tourists visit.

In addition, supplier and contractor linkages lead flow-on effects as the stimulus circulates through the local economy, which are also shown in the table below. When the flow-on effects are incorporated, this stimulus translates to a combined (direct and indirect) economic impact of:

- Output \$10.6 million per annum
- Value-added to GRP \$3.2 million per annum
- Employment 49 FTE annual jobs supported

TABLE 24: TOTAL TOURISM IMPACTS, PER ANNUM – HUON VALLEY LGA

Source of Stimulus	Output	Value-added to GRP	Employment (FTE)
Direct	\$5,400,000	\$2,600,000	44
Flow-on impacts	\$5,200,000	\$600,000	5
Total	\$10,600,000	\$3,200,000	49

Source: SGS Economics and Planning, 2020

Any spending by local Huon Valley residents when they visit the Pathway is excluded as it can be assumed that this expenditure would have otherwise been spent in the LGA irrespective of the Pathway being built.

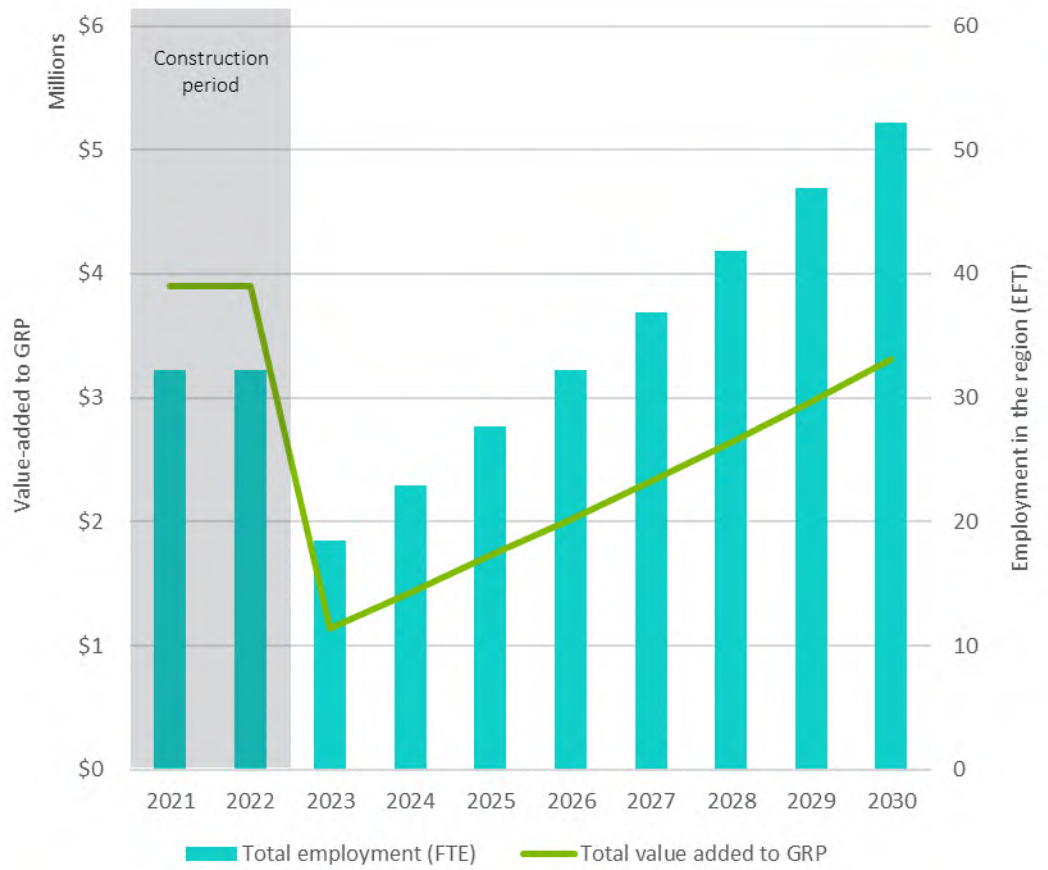
5.4 Total results

Over the next ten years, investment in the construction of the Pathway and its upkeep, plus the visitor attraction it generates, directly contributes \$18.8 million to the local economy (GRP) of the Huon Valley and 16 to 47 FTE jobs per annum are supported.

In addition, there are flow-on effects as the stimulus circulates through the local Huon Valley economy. When the flow-on effects are incorporated, investment in the pathways adds \$24.4 million to GRP over ten years, supporting 64 FTE jobs per annum during construction and 54 FTE jobs per annum by 2030 due to increased tourism expenditure and track upkeep. The total economic impacts per annum are shown in Figure 22.

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FIGURE 22: PER ANNUM ECONOMIC IMPACTS OF INVESTMENT IN THE SHARED PATHWAY



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6. FINDINGS AND CONCLUSIONS

The existing foreshore area provides very limited access to the Huon River over much of the distance. This means the areas natural values are not easily accessible for the local community or visitors. **The development of the high-quality pathway would provide river access to a broader range of the community.**

The socio economic profile of the Huon Valley presents challenges in terms of its economic future. The Region has an ageing population, growing presence of young families, higher than average unemployment, and limited employment opportunities. **Investment in social and tourism infrastructure would address some of these issues.**

Participation in unstructured recreational activity is growing, as is the local population. Australians are increasingly demanding infrastructure that facilitates passive recreation, as opposed to traditional recreational assets such as sportsgrounds. **Investment in tracks and trails is in line with the trend of unstructured recreation. Providing access for all abilities is also essential for any new infrastructure.**

The Huon Valley is missing out on the tourism growth currently being enjoyed by the State of Tasmania. Although there are existing high quality attractions, the Huon Valley's market share of State visitation has been falling in recent year. **The Pathway could help reversing this trend and help the Valley to benefit from tourism growth.**

The Pathway strongly aligns with the goals and strategies of both Huon Valley Council and the Tasmanian Government, as it intends to provide numerous benefits to residents, tourists, Huon Valley and Tasmania as a whole. It aims to improve community liveability, public health and wellness, attractiveness as a tourism destination and the increase the strength of the local economy.

The Huon Valley community and visitors who participated in the project engagement activities overwhelmingly support the construction of the pathway, with 96% of survey respondents being either strongly supportive (90.7%) or supportive (5.7%) of the pathway. Further, nearly 97% of survey respondents note that they would personally use the Pathway if it was constructed.

Across both the workshop and online survey platforms, community members and visitors alike actively engaged in the activities and presented many new opportunities for community and visitor utilisation of the infrastructure, and were convinced of the many benefits the pathway would provide.

Additional engagement may be required with the landowners with land abutting the Crown Land where the pathway would be constructed, particularly during the detailed design phase of the Pathway. This would aid in allaying any residual concerns about safety, privacy, and perceived impact on wildlife.

Tasmania has an established profile as a destination for nature-based tourism excellence. Iconic destinations including the 3 Capes Trail and Cradle Mountain are attracting high levels of domestic and international visitation. The Pathway would add another tourist destination to the visitor itinerary.

Many regions around the State are benefiting from the growing visitor market. The Huon Valley is mainly a 'day-trip' destination. This means the Huon Valley Region is not currently attracting a proportional share of overnight visitors. **The Pathway would entice visitors to extend their stay into overnight visits.**

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Developing the Pathway will deliver economic growth and employment to the community.

Investment in the proposal will result in increased economic activity in the Huon Valley, including additional employment opportunities and demand for locally produced goods and services. An economic impact assessment revealed that investment in the pathways adds \$24.4 million to the gross regional product of the Huon Valley over ten years (2020-2030), supporting 64 FTE jobs during construction, and 54 FTE jobs per annum by 2030 due to increased tourism expenditure and track upkeep.

The results of the cost-benefit analysis highlight that the benefits outweigh the costs, and that the project is well worth pursuing:

- The Huon River Foreshore Shared Pathway project has a net present value to the community of \$30.8 million over the thirty year analysis period.
- The Pathway has a benefit-cost ratio of 2.25 implying that for every \$1 invested, there are \$2.25 worth of benefits provided to the Huon Valley, and by extension, the Tasmanian community.
- In addition, there are considerable unquantified benefits of the project, meaning the true BCR ratio is even higher than the conservative one based on quantitative analysis.

SGS Economics and Planning thus recommends that the Huon River Shared Pathway project is worth pursuing from a broad community benefit point of view.

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APPENDIX 1: ONLINE SURVEY

Huon River Shared Pathway: Have your Say!

Huon Valley Council are currently assessing the feasibility of developing a shared pathway along the Huon River, running from Huonville to Franklin. Once completed, we envisage that the accessible pathway would bring numerous benefits to the Huon Valley, both the tourists, local residential and businesses.

The pathway would be multi use, accommodating walkers, cyclists and kayakers, with provisions for disability access on key sections of the route. The route for the pathway would be entirely contained within the Crown Land Foreshore Reserve along the banks of the Huon River. The pathway would start at Coolstore Road in Huonville, covering a distance of 7.5km along the riverbank through to Franklin, finishing at the Wooden Boat School (as shown below). The pathway would provide river front access for walkers, cyclists and those using mobility aids, along with providing additional entry points to the Huon River for Kayaking.

FIGURE 23: LOCATION OF THE PROPOSED HUON RIVER SHARED PATHWAY



We at Council are keen to hear what your views are on proposed pathway. The survey which follows will help us understand what visitors and community members alike think of the proposed pathway; the benefits, the costs, and the opportunities.

You can also fill out this survey online at:

All responses are confidential to the project and will not be identified with individuals. We will use the information you give us to further develop the pathway project, and provide inputs to the subsequent stages of community engagement.

Thank you in advance for taking our survey. Your insights are greatly appreciated.

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Survey

Please tick the appropriate box/es indicating your response for each question.

Q1. Please tick the following that best describe you. I am:

- A Huon Valley Resident
 - A Local business owner
 - Employed locally in the Huon Valley
 - A visitor to the area (Tasmanian resident)
 - An Interstate tourist
 - An International tourist
 - Other (please detail)
-

Q2. How supportive are you of the proposed pathway? (please select one)

- Strongly supportive
- Supportive
- Undecided- Neutral
- Unsupportive
- Strongly unsupportive

Q3. Can you please explain your answer?

Q4: Do you have any concerns or issues with the shared pathway project?

Q5. Do you currently access the Huon River for leisure activities?

- Yes
- No

Q6: How do you rate your current level of access to the Huon River for leisure activities?

- Excellent
- Very good
- Good
- Fair
- Poor

Q7. Would you personally use the shared pathway if it was constructed?

- Yes
- No

Q8: If yes, how often would you use the shared pathway? (please select one)

- Daily
 - A couple of times per week
 - A couple of times per month
 - A couple of times per year
 - Other (please detail)
-

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Q9. If yes, what method of transportation would you use on the shared pathway?

- By foot
 - Bicycle
 - Mobility aid
 - Kayak (access to the Huon River by the pathway)
 - Other (please detail)
-

Q10. Would you use the shared pathway with others?

- Family
 - Friends
 - Visitors to the area
 - Other (please detail)
-

Q11. What sorts of facilities along the pathway would be essential or nice to have (non-essential)? (please check)

Facilities	Essential	Non- essential
Drinking fountains		
Bicycle fixing stations		
Shuttle/ bus services transporting people back to their starting point		
Cultural/ heritage/ environmental interpretation		
Exercise equipment		
Play spaces		
Shelter		
Benches/ seats		
Other (please detail)		

Q12. Can you think of any business opportunities the shared pathway could generate?

Q13. Do you think the shared pathway could attract additional visitors/ tourists to the Huon Valley?

- Yes
- No
- I'm not sure

Additional questions if you are a visitor to the Huon Valley:

Q14: Would this shared pathway entice you to return to the Huon Valley in the future?

- Yes
- No
- I'm not sure

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Q15: If the pathway already existed, do you think you would have extended your visit to the Huon Valley?

- Yes
- No
- I'm not sure

Q16: If yes, how many days do you think you might have extended your visit by?

Q17: What elements of the pathway would make the experience truly memorable for you?

Council will be hosting a workshop to discuss the shared pathway project further with the community. This workshop will be held on Tuesday the 18th of February 2020, from 6pm- 8pm at the Palais Theatre in Franklin (3388 Huon Highway).

If you are interested in participating in this workshop, please provide your Name and email address below for us to send the invite.

Name:

Email address:

Thank you for filling out this survey. Your insights are highly valued and greatly appreciated.

If you have any further questions or comments, please contact Council's community engagement officer Lisa Plohl at HVC@huonvalleycouncil.com.au

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APPENDIX 2: WORKSHOP AGENDA

Project	Huon River Foreshore Shared Pathway Cost Benefit Analysis Landholder and Community Workshop			
Workshop Aim	We aim for you to: <ul style="list-style-type: none"> ▪ Understand the project ▪ Have the opportunity to discuss the project's potential benefits, opportunities and challenges ▪ Feel like your ideas, perspectives, support and/ or concerns have been heard, recorded and considered. 			
Workshop facilitators	<ul style="list-style-type: none"> ▪ Rebecca Stevenson, Director Community Services ▪ Rebecca Bell, Manager Recreation Services, Huon Valley Council ▪ Lisa Plohl, Community Engagement Officer, Huon Valley Council ▪ Ellen Witte, Principal, SGS Economics and Planning ▪ Tara Callinan, Senior Consultant, SGS Economics and Planning 			
Timing	Steps	Content	Activity	Facilitator
5 mins	Welcome and intro	The Council team provides a welcome and introduces the project team. Council delivers an Acknowledgement of Country.	Welcome (no slides)	Rebecca Stevenson, HVC
5 mins	Project Overview	<ul style="list-style-type: none"> ▪ What is the Huon River Foreshore Shared Pathway? ▪ What stage of the project are we in? ▪ What will it look like? 	Presentation	Rebecca Stevenson, Rebecca Bell, HVC
5 mins	Survey Overview	<ul style="list-style-type: none"> ▪ What has the community said so far? 	Presentation	Tara Callinan, SGS
10 mins	CBA Initial insights	<ul style="list-style-type: none"> ▪ What is a Cost Benefit Analysis? ▪ What costs and benefits are being looked at in this study? ▪ What are some initial findings? 	Presentation	Ellen Witte, SGS
15 mins	Question time	Council and SGS to take questions from the floor on presentation content	Large Group Discussion	All
50 mins	Interactive discussion	<ul style="list-style-type: none"> ▪ Time to be creative! Individually visualise then draw how you might use and enjoy the pathway ▪ As a group: what are the different opportunities the pathway might bring? To the towns, to the community, to businesses, to Tasmania? ▪ What supporting elements might we need to ensure these opportunities are realised? 	Small Table Activities and Discussions	Tara Callinan, SGS
20 mins	Reporting Back	Groups summarise each table discussion and ask for further input from group members if required, individuals are invited to share their creative expressions	Large Group Discussion	Tara Callinan, SGS
10 mins	Future Actions	Discuss project next steps and opportunities for further involvement	Presentation	Rebecca Bell, HVC
	Close	Thank you and Feedback on workshop	Feedback, Contact sheet	Lisa Plohl, HVC

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APPENDIX 3: WORKSHOP FULL NOTES

Landowners

TABLE 25: CONCERNS AND POTENTIAL RESOLUTIONS - LANDOWNERS

Issue/Concern	Description	Resolutions/requirements
Snakes	Snakes are sun soakers and a risk to children	Signage to educate users
Mosquitoes	Swamp areas	Section off proposed walkway
Dogs	Dogs not under effective control or on leash - danger to others including children and wildlife	Clear signage for dogs to remain on leads
	Dog fights	Owners to be aware of other users
	Impact on wildlife	Policing
	Faeces	Regulation by rangers
		Signage
		Poo bags and bins however, council already knocked back poo rubbish bins for dogs at Coolstore Road
		Implement a curfew for dogs
Vehicles: Segway, electric bike, pedal bike	Speed of cyclists	Users to follow road/traffic rules - awareness of bike speed
	Not keeping left	Users must give way to pedestrians - pedestrians to keep left
	Safety of pedestrians and cyclists	Consider surface type and materials in construction to discourage high speeds of cyclists. The use of gravel surface also looks more natural.
		Consider restriction of no motor bikes
Business Parking	Limitation of customers	Consider lifting the restrictions
Safety/Security	People moving through the community without police being able to pursue	Safe pathway
	Currently not a safe place to walk/cycle	Secure dog proof fence with a locked gate to give property owners access to the track
	Falling limbs	Signage regarding estimated time between stops along the track
	After dark usage	Brochure and map of track
	Access to private jetties	Lighting
	Access to moored boats	
	Drownings. Who is responsible?	
	Theft	

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	Security of jetties and boats	Security for jetties and boats
	Fire hazards from campfires	
Waste/rubbish	Who polices?	No bins to encourage users the practice of taking rubbish away
		Bins
Privacy issues	Landowners concerned with lack of privacy and security	Low priority. A shared pathway enables access, use and benefits the wider public. Landowners with properties adjacent to proposed path can plant a hedge or build a fence to the appropriate height.
	Shortcuts through private property	
Costs	Concrete track not aesthetically pleasing	Use of recycled 'filler' for concrete alternative
	Exceeding initial estimates	Upgrade town infrastructure instead
Signage	Currently little signage	More signage to keep left and dogs on leash, location of toilets, drinking water locations, estimate times, no motor bikes etc.
		No firearms signage required
		Selected signage points for river observation
Maintenance	Marina North-Franklin vandals	Encourage formation of 'Friends Groups' to assist with weed control and revegetation
	Maintaining crown land - mowing	Local school could assist with planting plants at the foreshore
		Boardwalk requires minimal maintenance
Environmental/Wildlife	Safety	Weave track away from sensitive areas near river and closer to the highway
	Cattle going to river	Full environmental assessment regarding wildlife in marshy areas
	Fencing costs to contain wildlife	
	Erosions to riverbank	
Access/Parking	Public can't access a lot of the riverside	
	Access for fire brigade and emergency services	
	Already major issue from Huon end	
Value	Decrease in property value due to intrusion and loss of privacy	
Flooding		
Illegal camping		Signage for no camping
Operation	24/7 access	
Infrastructure	Increase in traffic at entrance points	
	Access to water	Specific access points for boating activities
Public Liability Insurance	Who pays?	Steering committee with landowners and stakeholders involved for council authorities

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Design	Boardwalk never designed wide enough to accommodate bikes, prams, people, electric wheelchairs	
Levels of use	Tourists never spend enough time in area	
Public Amenities	Maintenance of toilets	Picnic areas

TABLE 26: BENEFITS AND OPPORTUNITIES – LANDOWNER

Benefits/Opportunities	
Economic	Increased tourism and visitation to town
	Supports new and existing businesses and entrepreneurship: food outlets, pop up cafes and coffee vans
	Tours and walks: bush food tours, guided tours on nature, history and photography tours, wildlife tours, bike/segway tours, boat tours, night tours
	Local produce stalls/markets: food market, Christmas market, plant market, produce market, night market
	Hire business opportunities - bike, scooter, kayak, accessibility
	Accommodation opportunities
	Employment opportunities during construction stage
Recreational	Attract wildlife, bird watchers and creation of bird hides
	Walking/running
	Cycling activities including a range of bikes and segway
	Accessibility features
	Outdoor fitness groups: tai chi and other free group activities
	Pontoon walkway
	Passive recreation: Photography
	Access to entire river
Environmental	Alternative route to work via walking/riding reduces carbon emission from cars
Community	Indigenous culture trial - historical
	Lifestyle: Personal health and wellbeing, physically and mentally - more opportunity to be outside
	Improved physical health, decrease obesity
	Improved mental health: lower stress
	Formalised usage of public jetties and pontoon

Community group 1

TABLE 27: CONCERNS AND POTENTIAL RESOLUTIONS – COMMUNITY 1

Issue/Concern	Description	Resolutions/requirements
Design	Hard edge concrete to fitting with the natural beauty of Huon	Refer to Lyminton Road walkway
	2m pathway width will be challenge for cyclists to safely pass wheelchairs or prams	Analyse existing 2m pathways experience and consider widening frequent use sections to ensure safe passing

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	Location of water activity entry points	If concrete, use colour pigment
	Use of recycled materials for infrastructure	Forestry to be landscaped
	Beautification of foreshore	Designated boating and mooring locations
		Upgrade to 2 lane concrete highway if people use the path, otherwise leave it narrow and gravel
Safety/Security	After dark usage	Lighting
	Rails along boardwalk	Limitation on night access
	Has a security camera network been considered?	Informational signage including history and distance
	Campers along the roads	Safety barriers to be elevated for any part of the path close to roadways and low level points
		Defibrillator
Public Amenities	For recreational users	Good restroom
		Drinking fountains
		Accessible seating areas
		Exercise and children equipment
		Picnic areas
		Female change rooms
Maintenance	Vandalism	Business case study that includes maintenance by local business
	Weed spread management	Ownership by locals of sections of the pathway through passive surveillance, "pathcare" like Bushcare
	Who will carry out? Council or local business?	Clear rules/guidelines of what can be done on the pathway: no privatisation of the space unless any leasing returns moves directly back to path maintenance
Waste/rubbish	Littering	Frequently placed recycling bins and bins
		Recycling legislation
Access/Parking	Emergencies	Access points from path to local businesses
	Access to more of the river	Bus stops along route
		Communication system
		Car parks at either end
		Emergency water boat services
		Wooden boat moorings
		Pontoons
		Planning
Vehicles: Segway, electric bike, pedal bike	Shared pathway use	Separation line
	Cyclist speed	Clear signage of speed limits for cyclists

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	Extend cycling options	Compressed ground and boardwalk to slow cyclists and increase social interaction between cyclists and walkers
		Integrate with signed roads via Ranelagh camping and Willie Smith for bikes
Public Liability Insurance	Who pays?	
Infrastructure	Are current car parks and toilets enough or will more infrastructure be required to be built?	Seating integrated can be used as shelter, bird hides, river access for fishing/kayaking and road access
	Accessibility for elderly	Multi-functional car park and pick-up point
	Consideration of infrastructure upgrades to cope with extra people	More seating points will encourage less mobile/eldering people to use track
	Helipad at halfway point	Fishing room separate from walkers and in sites clear of snags
	Fishing localities	
Dogs	Owners unaware of their dogs	Dogs required to be on lead
		Clear signage for dogs to remain on leads
		Water bowls, poo bags and bins
		Fenced area for dogs not essential
		Dog park area
		Dog user educations to encourage engagement with staff and users
Cost		Develop first stage using existing esplanade and enhancing existing infrastructure to get results
		Use Skinners Creek Path as example of more economic and extensive means of construction to expedite project
		Sports grant through parliament
Community involvement	Will employment be local?	Use talents of disaffected youth so they feel a sense of ownership and pride in contribution
	Will construction materials be purchased locally?	Use construction for training purposes - work for dole
Privacy	Securing private properties that back onto walkway	Manage security cameras
	Noise from users partying, jet skis, electric bikes	Place restrictions on jet skis and encourage more kayaking
		Speed limits for electric bikes
		Ban jet ski use on jetties
Environmental/Wildlife	Protection for sensitive species	Do not have "dog off leash" area
	Maintain wild and natural integrity of foreshore/river	Educate users on local habitat

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TABLE 28: BENEFITS AND OPPORTUNITIES – COMMUNITY 1

Benefits/Opportunities	
Economic	Opportunity for water events and supporting facilities e.g. Parkrun events and river festivals, art festivals
	Supports new and existing businesses and entrepreneurship: food outlets, pop up cafes and coffee vans
	Local produce stalls/markets: food market, Christmas market, plant market, produce market, night market
	Increased tourism and visitation to town
	Ferry to Craddock, Huonville, Franklin etc.
	Tours and walks: bush food tours, guided tours on nature, history and photography
	Hire business opportunities - bike, scooter, kayak, accessibility
	Accommodation opportunities
	Fishing lessons
	Shuttle bus
	Sponsored seats e.g. people who have died
	Attracting grants
	Possible extension to Ranelagh - reduce future development costs
Recreational	Safe running trail for running clubs/individuals
	Adventure trail for mountain biking
	Increase passive recreation such as walking
	Water activities such as kayaking develops use of river and enjoyment of natural beauty (from viewing platform)
	School groups: educational walk, camps, triathlons
	Location for motor bikers to stop and stretch
	Linkage to Wattle Grove and Cygnet via walking and kayaking
	Fishing platforms
	Safe swimming spots
	Access to nature
	Cycling activities including a range of bikes
	Attract wildlife, bird watchers and creation of bird hides
	Cycling extensions to Geeveston, Cockle Creek, Ranelagh and Judbury
	Geocaching site opportunity
Environmental	
Community	A visually beautiful pathway people will remember
	Connection between Huonville and Franklin
	Pride in the Valley
	Show off river
	Potential to become a design icon like Wakaluna, Gasp and Tamar Wetlands
	Aboriginal heritage honouring
	Inclusion in Tasmania map of walking tracks
	Sculptures along path e.g. Geelong
	Link to longer walk Judbury, South Cope walk

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	Potential art and cultural display - annual walkway art prize like beach sculptures - Huon version of The Glover Prize
	Lifestyle: Personal health and wellbeing, physically and mentally - more opportunity to be outside
	Improved physical health, decrease obesity
	Improved mental health: lower stress

Community group 2

TABLE 29: CONCERNS AND POTENTIAL RESOLUTIONS – COMMUNITY 2

Issue/Concern	Description	Resolutions/requirements
Dogs	Impact on wildlife	Dogs required to be on lead - donates dog leashes available at entrance points
	Walker/runner interactions	
Vehicles: Segway, electric bike, pedal bike	Shared pathway between walkers and cyclists	No quad bikes
		Motorised bikes ok
		Separation line
		Segway access
Flooding	Concern for landowners	Close off path
	Climate change may cause river to rise and submerge low-lying path	Wet weather shelters
Public Amenities	Drinking water	
Design	Concrete	Use recycle materials as much as possible
Public Amenities		Toilets
		Picnic areas
Access/Parking	Private lease holders for jetties	Surrender lease in exchange for same benefit of access at no cost
		More car parks for safe parking
Environmental/Wildlife	Cement/run-off	
	Environmental impact especially on fauna (particularly birds)	
	Pollution	
Safety/Security	Vandalism	Defibrillator station
	After dark usage	Security cameras
	Bike/pram mobility aid	Potentially limit hours of use via a night-gate/chain
		Signage
		Walking concierge to help people
Waste/rubbish	Littering	Waste management throughout track
	waste/septic disposal	
Cost	Lack of adequate funding to complete to standard	Ask Sckomo for another \$150m
	Costs will protract from project; current community needs not met	Supportive/continuous funding from all levels of government
Project	Credibility of council if project fails to materialism	Continued community consultation

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Infrastructure	Feed road overwhelmed	
	Increased traffic/parking	
Privacy	Impact on adjacent resident	
Maintenance		Community engagement; joint consultation and co-operation

TABLE 30: BENEFITS AND OPPORTUNITIES – COMMUNITY 2

Benefits/Opportunities	
Economic	Hire business opportunities - bike, scooter, kayak, accessibility
	Opportunity for water events and supporting facilities
	Supports new and existing businesses and entrepreneurship: food outlets, pop up cafes and coffee vans
	Employment opportunities using labour schemes such as Criminal Justice Scheme, Aboriginal Building/Construction Scheme Training Scheme,
	Employment opportunities for local Aboriginal construction/maintenance companies
	Increased tourism and visitation to town and staying rather than driving through
	Transport network for Franklin
	Employee retention due to commuter benefits
	Encourage local Valley recruitment in life of the project
	Join up to Skinners Creek and along esplanade - reduce future development costs
Recreational	Access to water
	Guided passive recreational tours
	Opportunity for school groups: educational walks, camps, triathlons
	Bird Hides
Environmental	Alternative route to shops via walking/riding reduces carbon emission from cars
	Environmental impact awareness
	Pride in the Valley
Community	Volunteer group opportunities and Aboriginal Rangers
	Redefines local community identity
	Lifestyle: Personal health and wellbeing, physically and mentally - more opportunity to be outside
	Improved physical health, decrease obesity
	Improved mental health: lower stress

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APPENDIX 4: DATA TABLES

Construction cost estimates

The table below provides the estimated construction cost of the pathway as prepared by pitt&sherry. A matrix of cost estimates was developed to cost a range of different factors including path width (2m or 2.5m), pathway material (gravel, stabilised gravel, bitumen and concrete) and decking material for boardwalks and bridges (treated pine and FRP (fibreglass reinforced polymer)).

TABLE 31: CONSTRUCTION COST ESTIMATES FOR THE SHARED PATHWAY

Path Material	Boardwalk and Bridge Deck Material			
	Treated pine	Treated pine (total)	FRP	FRP (Total)
2 m gravel	\$13,796,200	\$18,210,984	\$10,752,750	\$14,193,630
2.5 m gravel	\$17,220,250	\$22,730,730	\$13,405,250	\$17,694,930
2 m stabilised gravel	\$13,991,200	\$18,468,384	\$10,939,200	\$14,439,744
2.5 m stabilised gravel	\$17,464,000	\$23,052,480	\$13,649,000	\$18,016,680
2 m bitumen	\$13,991,200	\$18,468,384	\$10,939,200	\$14,439,744
2.5 m bitumen	\$17,464,000	\$23,052,480	\$13,649,000	\$18,016,680
2 m concrete	\$14,186,200	\$18,725,784	\$ 11,134,200	\$14,697,144
2.5 m concrete	\$17,707,750	\$23,374,230	\$13,892,750	\$18,338,430

Note: No allowance has been made for vegetation clearance

Source: pitt&sherry (2019)

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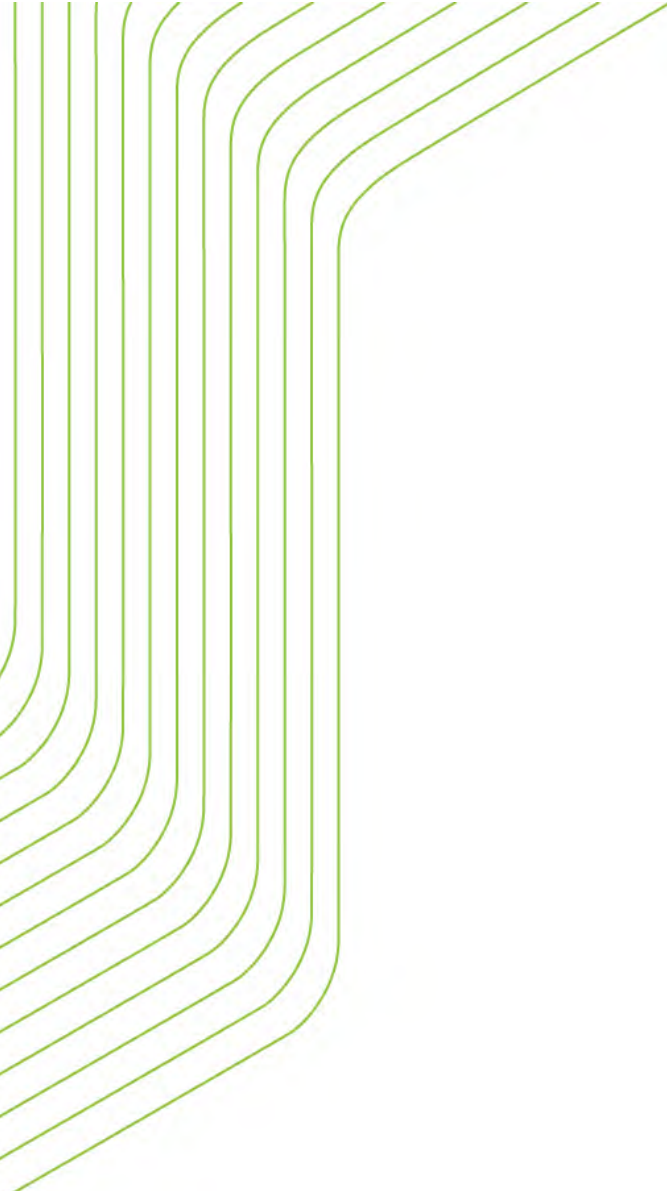
Economic impact: Operating surplus and compensation of workers of tourism spending by sub sector

This has been calculated by analysing the ABS tourism satellite accounts and dividing the direct tourism output by the gross operating surplus and money spent on wages to find the profit margin of different tourism related industries and the share of revenue spent on wages. These percentages are shown in the table below.

TABLE 32: GROSS OPERATING SUPLUS AND WORKER COMPENSATION BY DIFFERENT TOURISM RELATED INDUSTRIES (%)

Tourism related industries	Operating surplus	Compensation of workers
Accommodation	16%	31%
Ownership of dwellings	70%	0%
Cafes, restaurants and takeaway food services	8%	35%
Clubs, pubs, taverns and bars	27%	25%
Rail transport	17%	28%
Taxi transport	27%	16%
Other road transport	16%	26%
Air, water and other transport	11%	20%
Transport equipment rental	41%	16%
Travel agency and tour operator services	23%	38%
Cultural services	16%	35%
Casinos and other gambling services	40%	14%
Sports and recreation activities	7%	16%
Automotive fuel retailing	18%	13%
Other retail trade	18%	41%
Education and training	8%	66%
Other	28%	41%
GRAND TOTAL	19%	29%

Source: ABS Tourism Satellite Accounts



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