Cowes to Stony Point

Vehicle Ferry Business Case:
Industry and Community Consultation
Project Aim

To develop an independent Business Case for the Stony Point to Cowes vehicle ferry by engaging the community and industry to understand and define the social, environmental and economic contributions and possible impacts.

This is a precursor to further environmental assessments if the project proceeds.
Background

**Consultation** over the past decade has consistently raised the need for **better linkages** for:

- Employment
- Access for emergency services
- Access to public transport
- Tourism and community links

The Business Case will assess whether a Car Ferry is needed to achieve this
Visitor Economy Strategy

Undertake a study in 2017 to test the need and viability of a car ferry, which would need to be developed to the highest environmental standard as an example to other locations.
Today

1) The Approach

2) The Need

3) The Impacts & Issues

4) The Business Model

5) Next Steps

WORKSHOP AIM:
To listen to the industry and the community and gain input to the development of a robust Business Case for the concept of a Car Ferry.
Developing the Business Case

✓ Interagency Steering Committee Formed
✓ Investment Logic / Project Options Workshop (Aug)

STAGE 1: HAVE INPUT & SHARE YOUR VIEWS (SEPT – DEC)
✓ Technical Investigations (Underway)
✓ Resident / Business / Visitor Survey (Underway)
✓ Small Group Meetings (Underway)
• Community and Industry Consultation (Oct)
• Discussion Paper (November)

DRAFT BUSINESS CASE (DEC 2017)

STAGE 2: FEEDBACK ON THE DRAFT BUSINESS CASE (JAN – MAR)

FINAL BUSINESS CASE (MAR – APR 2018)
**Stakeholder Engagement**

**Public Meetings**
- Structured meetings with speakers.
- Phillip Island: 5th October 2017
- Mornington Peninsula: 6th October 2017
- Round 2 – Jan/Feb (2018)

**Drop-in Sessions**
- Informal meetings to discuss the project.
- Phillip Island: 5th October 2017
- Mornington Peninsula: 6th October 2017
- **Weekend Drop-in Sessions late October**
- Round 2 – Jan/Feb (2018)

**Small Group Meetings**
- Arranged with groups – on request.
- From September to late November and again in Stage 2 on request.
# Stakeholder Engagement

## Council Presentations

| Consultation Process Update                | September 2017 |
| Discussion Paper & Consultation Update    | November 2017  |
| **Draft Business Case**                   | December 2017  |
| Public Consultation Update                | March 2018     |
| **Final Business Case**                   | April 2018     |

## Websites, Online Surveys and Emails

| Page on each Councils website             | Online now     |
| A resident, industry and visitor survey   | 18th September – 5th November |
| Direct to the project team via email      | Phase 1 (Input): October 2017  
Phase 2 (Feedback): February 2018  |
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Visitor Economy Strategy

Phillip Island and the Mornington Peninsula get less than half of the ‘touring’ market that visit the Gippsland because they are not on the touring loop.

Plus day visits and bus groups that is approximately 46,000 car trips per annum.

This excludes local trips for work, education and other business.
Visitors by Region (March 2017)

- **Great Ocean Road**: 5,107,448 (7%)
- **Geelong and the Bellarine**: 5,052,264 (8%)
- **Phillip Island**: 6,088,128 (4%)
- **Mornington Peninsula**: 1,493,468 (5%)
- **French Island**: 9,673
- **Wonthaggi – Inverloch**: 811,876 (1%)

Region:
- **SA2**
Creating an Iconic Touring Route

Iconic Touring Loop:
333km (inc. 2 ferries)

GOR:
252km, 3h51m drive

Sorrento
Stony Point
Melbourne
Queenscliff
Cowes
Geelong

Iconic Touring Loop:
333km (inc. 2 ferries)
International Case Studies

Coastal Circle Route (BC)
- Distance: 564 km
- Ferries: 2
- Promoted as a cultural experience (food, arts, history and indigenous culture)

Helgelandskysten (Norway)
- Distance: 433 km
- Ferries: 6
- The longest touring route in Norway, promoted for scenic beauty across a range of landscapes

Wild Atlantic Way (Ireland)
- Distance: 2,500 kilometres
- Ferries: 1
- Wild coastal landscapes, a range of festivals and adventure activities
VES - Medium Demand Scenario

**Assumptions**
- 36 car vehicle ferry
- 300 passengers
- 10 sailings per day (5 each way)
- 365 days per year
- Annual ferry capacity of **130,000 vehicles**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Medium Demand Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of annual car capacity achieved</td>
<td>38%</td>
</tr>
<tr>
<td>Estimate no. of cars using ferry annually</td>
<td>49,275</td>
</tr>
<tr>
<td>Annual average no. of cars per sailing</td>
<td>18</td>
</tr>
<tr>
<td>Estimated no. of car passengers</td>
<td>105,000</td>
</tr>
<tr>
<td>Estimated no. of coach passengers</td>
<td>21,900</td>
</tr>
<tr>
<td>Annual average no. of coaches per sailing</td>
<td>0.2</td>
</tr>
<tr>
<td>Estimated no. of foot passengers</td>
<td>32,850</td>
</tr>
<tr>
<td>Total passengers</td>
<td>126,900</td>
</tr>
<tr>
<td>Annual average no. of passengers per sailing</td>
<td>35</td>
</tr>
</tbody>
</table>
The following table shows the components of this increase in regional income from the base case ferry operations.

<table>
<thead>
<tr>
<th>Full Year Operations</th>
<th>Accommodation Sector ($ million)</th>
<th>Generated by Visitors Spending ($ million)</th>
<th>Total ($ million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1 Medium</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct</td>
<td>5.636</td>
<td>9.713</td>
<td>15.349</td>
</tr>
<tr>
<td>Indirect/induced</td>
<td>1.112</td>
<td>1.564</td>
<td>2.676</td>
</tr>
<tr>
<td><strong>Total Regional Income ($m)</strong></td>
<td><strong>6.748</strong></td>
<td><strong>11.277</strong></td>
<td><strong>18.025</strong></td>
</tr>
</tbody>
</table>
The following table shows the estimated overall regional employment impacts of the base case ferry operations. It covers all visitors that are estimated to use the ferry.

<table>
<thead>
<tr>
<th>Full Year Operations</th>
<th>Accommodation Sector (Jobs FTE)</th>
<th>Generated by Visitors Spending (Jobs FTE)</th>
<th>Total (Jobs FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Jobs</td>
<td>78.8</td>
<td>168.5</td>
<td>247.3</td>
</tr>
<tr>
<td>Indirect/induced Jobs (multiplier impacts)</td>
<td>17.9</td>
<td>25.4</td>
<td>43.3</td>
</tr>
<tr>
<td>Total Jobs</td>
<td><strong>96.7</strong></td>
<td><strong>193.8</strong></td>
<td><strong>290.6</strong></td>
</tr>
</tbody>
</table>
Stradbroke Island is a 13 km ferry journey from the mainland. During peak season during the Christmas/New Year period of 2013-2014, a lightning strike caused an extensive fire requiring the emergency evacuation of 950 campers with 400 vehicles in less than 24 hours.

Stradbroke Ferries mobilised their fleet, calling in an additional three vehicle ferries to supplement their usual 2 vehicle barges to double their services and smoothly shuttle all evacuees from the island in 29 trips. They also aided emergency service personnel in providing services and machinery to the Island.
**BENEFIT MANAGEMENT PLAN**

**Part 1: Benefit Map**

**BENEFIT**

**Regional economic growth and investment**
- Increase visitor spend and dispersal: 30%
- Increase regional employment: 30%

**A more inclusive and productive community**
- Increase inter-regional commuting: 10%
- Reduce travel times between Cowes and Frankston: 10%

**A safer community**
- Increase optimum emergency vehicle throughput: 20%

**KPI**

- Total visitor spend
- % of visitors travelling between Mornington and Bass Coast
- FTE equivalent employment
- Number of commutes between regions
- Average travel times between Cowes and Frankston
- Optimum emergency vehicle throughput
Data to establish the need

**NATIONAL / INTERNATIONAL DATA**
- NVS / IVS Trip Grid (3YMA)
- Customer Demand / Pricing Study
- Ferry Case Studies

**TRANSPORT DATA**
- Journey To Work data
- AADTs, Crash data, evacuation data
- Ferry data (past and present)

**LOCAL DATA**
- Visitor Survey Data
- Mobile Phone Data Tracking
- Primary Visitor Survey (underway)

What is the need and how is it best quantified?
Today

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WORKSHOP AIM:
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Base Case Ferry Specifications

• Roll on, Roll off vehicle carrying ferry with passenger carrying capability
• Catamaran design for optimum weather handling and berthing
• Approx. 30-40 metres in length
• Vehicle capacity 30-40 vehicles
• Passenger capacity 200-300 passengers
• 15 – 30 car spaces
• Offering up to 10 return sailings daily between Phillip Island and Stony Point (5 each way)
Base Case Ferry vs Sorrento Ferry

**Base Case Ferry**

- **Length:** 30.4m
- **Width:** 15.8m
- **Draw:** 2.2m
- **Passenger capacity:** 300
- **Vehicle capacity:** 30 cars (or 1 bus plus 18 cars)
- **Speed:** 15 knots

**Sorrento Ferry**

- **Length:** 61m
- **Width:** 16.4m
- **Draw:** 2.3m
- **Passenger capacity:** 700
- **Vehicle capacity:** 56 cars (7 buses and 30 cars)
- **Speed:** 11 knots
Stony Point Concept Plan (2010)

Key Environmental Features

- Biosphere Reserve (2002)
- RAMSAR Wetland
- Extensive habitat for shore birds
- Extensive Seagrass Meadows
- 3 Marine National Parks
- More diverse than Port Phillip Bay (marine fauna)

Despite its proximity to Melbourne, Western Port Bay demonstrates a generally healthy system!

(State of the Bays Report 2016)
Significant Habitats (Marine)

The water column in Western Port Bay is an important habitat for:
- Phytoplankton (microscopic single-celled organisms)
- Zooplankton (small animals that drift passively with the currents)
- Jellyfish

Seagrasses
- Control of sediment movements
- Nutrient and energy transfer
- Habitat for a diversity of animals
- Extensive loss of seagrasses in the 1970s, followed by some recovery
- Recovery has been poor in areas where water quality is a concern

Image Source: Port Phillip Bay Taxonomy Toolkit
**Significant Habitats (Marine)**

### Soft Sediments
- Have increased due to the loss of seagrass beds
- Intertidal mud flats are an important foraging ground for birds
- High diversity of ghost shrimps; brachiopods (living fossils); rare rhodoliths (colourful algae resembling coral); and various endangered species

### Rocky Reefs
- Only a small part of Western Port Bay
- Crayfish Rock with unusually high biodiversity
- Loss of biodiversity due to turbidity
- Intertidal reefs vulnerable to sea level rise

**Image Source:** Port Phillip Bay Taxonomy Toolkit

**Reference:** Melbourne Water Report (2011) *Understanding the Western Port Environment*
Significant Habitats (Terrestrial)

Mangroves
- Some of the southernmost mangroves in the world
- Mangrove forests line much of the shore of the bay
- Important habitat for juvenile fish
- Habitat loss and fragmentation a serious threat to mangroves

Saltmarshes
- 1000ha – amongst the largest tract of saltmarsh in Victoria
- Saltmarshes have been lost already due to development around the western and northern shore of Western Port

Image: Visit Victoria

Reference: Melbourne Water Report (2011) *Understanding the Western Port Environment*
## Protected Species (Terrestrial)

Source: EPBC Act and Flora Fauna Guarantee Act

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Likelihood to Occur at Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Swift Parrot</td>
<td>Endangered</td>
<td>Moderate</td>
</tr>
<tr>
<td>Orange-bellied Parrot</td>
<td>Critically Endangered</td>
<td>Moderate</td>
</tr>
<tr>
<td>Australian Painted Snipe</td>
<td>Endangered</td>
<td>Moderate</td>
</tr>
<tr>
<td>Shy Albatross</td>
<td>Vulnerable</td>
<td>Moderate</td>
</tr>
<tr>
<td>Southern Brown Bandicoot</td>
<td>Endangered</td>
<td>Likely</td>
</tr>
<tr>
<td>Grey-headed Flying-fox</td>
<td>Vulnerable</td>
<td>Likely</td>
</tr>
<tr>
<td>Grey-tailed Tattler</td>
<td>Critically Endangered</td>
<td>Data not available</td>
</tr>
</tbody>
</table>

Source: EPBC Act and Flora Fauna Guarantee Act

Swift Parrot Image: ABC
Orange-bellied Parrot Image: www.birdlife.org.au
Australian Painted Snipe Image: www.birdlife.org.au
Shy Albatross Image: WWF
Southern Brown Bandicoot Image: Western Port Biosphere
Grey-headed Flying Fox Image: QLD EHP
Grey-tailed Tattler Image: www.birdlife.org.au
Cowes Location

Identified the Primary Investigation Area as the Cowes Yacht Club based on:

- Community input on three previously identified locations
- Depths and dredging
- Ferry operation / distance
Design Options - Cowes

- Pylons rather than rock wall
- Wave attenuation
- Allow sand movement
- Vehicle and passenger ferry
- Berths for other operators (EcoBoat tours)
Business Case Considerations

Potential Impacts

- Wake-wash
- Air pollution
- Overboard discharges
- Noise (inc. Underwater)
- Visual pollution
- Traffic congestion & parking
- Sand movement
- Dredging / dredge spoil

What are the issues and what further information is needed?
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Development & Operating Model

- **Agreement to proceed** based on Business Case
- **Primary Environmental Monitoring** to quantify the environmental qualities and impacts (with community input)
- **Expression of Interest** for public private partnership to develop the infrastructure and operate the service
- **Detailed Design Process** to finalise the terminal design based on community input (with further consultation)
- **Service Contract** linked to the existing passenger ferry service linked to conditions:
  - Environmental operations
  - Pricing considerations
  - Marketing program
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WORKSHOP AIM:
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Next Steps

- Consultation Materials Finalised (Press Release, Flyer)
- Investment Logic Workshop (Aug)

**STAGE 1: HAVE INPUT & SHARE YOUR VIEWS (SEPT – DEC)**

- Technical Investigations (Underway)
- Resident / Business / Visitor Survey (Underway)
- Community and Industry Consultation (Oct)
- Small Group / One-on-one meetings (Underway)
- **Discussion Paper (November)**

**DRAFT BUSINESS CASE (DEC 2017)**

**STAGE 2: FEEDBACK ON THE DRAFT BUSINESS CASE (JAN – MAR)**

**FINAL BUSINESS CASE (MAR – APR 2018)**
THANK YOU

EarthCheck

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