TasNetworks
Delivering your power

MARINUS LINK

Delivering low cost, reliable & clean energy

Staverton to Hampshire Hills Transmission Line social impact assessment:

Community Engagement Report

Executive Summary

May 2021

These records and accompanying documentation prepared by representatives or consultants working on Project Marinus are intended for public release.

Introduction

- During March 2021, TasNetworks undertook community engagement in support of the Staverton to Hampshire Hills (SV-HH) Social Impact Assessment (SIA). The purpose of the engagement was to gather feedback from the community about both the project itself and some specific topics the SIA will be examining.

- Feedback was collected through two separate processes:

  - Two workshops with community members surrounding the preferred route of the SV-HH transmission line, with a total of 42 self-selected participants

  - Social research* with broadly representative (and mostly randomly-selected) community members from the six affected North-West Tasmanian municipalities. The research included:

    - Random telephone survey with approximately 700 demographically representative community members, supplemented by approximately 300 participants via an online panel survey – a total of 1,000 respondents

    - Four focus groups, with a total of 42 recruited participants.

- *Social research outcomes will also be used to inform a Community Benefits Sharing Program and the SIA for the remaining north-west Tasmanian transmission developments

TasNetworks Delivering your power

MARINUS LINK

Introduction

- The purpose of this executive summary is to provide a high-level overview of the key themes and outcomes of the engagement. For a more comprehensive understanding of each engagement process, please see the engagement summary reports attached to this executive summary.

Key findings

- The engagement identified what the community:
  - Values about north-west Tasmania.
  - Sees as the most significant local challenges facing the community.
  - Rates as the most positive and negative quality of life factors
  - Thinks about the project, its benefits and disadvantages, and potential impact mitigations.
- Collectively, the outcomes of the three different engagement processes also demonstrate the similarities and differences in views between those who live in proximity to the preferred transmission line and self-selected to attend the workshops, and those who were randomly recruited from across the six affected municipalities.

TasNetworks
Delivering your power

MARINUS LINK

Potential project impacts

A number of positive and negative project impacts were raised by participants:

- **Unemployment**

For recruited participants, providing local jobs was by far the most identified benefit of the project and the SV-HH transmission line. Actively working to ensure that local people had the right skills and capabilities for project jobs was identified as a critical way this benefit could be most effectively realised. Project jobs would not be perceived as beneficial if they were going to be taken up by FIFO or other mainland workers, which would exacerbate already existing housing availability and affordability issues in North-West Tasmania. Concern that jobs would only be available during the construction phase of the project was raised by both recruited and self-selected participants. Working on the provision of jobs in the long-term was identified by recruited participants as a method of ensuring the project delivered real benefits to the local community beyond construction

TasNetworks
Delivering your power

MARINUS LINK

Potential project impacts

Environment

Both self-selected and recruited community members strongly value the environment, which is seen as a critical contributor to a high quality of life. Concerns that the project would negatively impact the environment, including both flora and fauna, were raised by both groups, to varying degrees. Self-selected participants also expressed concern that the project would negatively impact fire risk and mitigation, the karst system and water quality.

For recruited participants, the importance of delivering the project with limited environmental impact was raised, as was the potential that if 'done right' the project could become a world class project in clean energy.

Potential project impacts

Economic impacts

Both self-selected and recruited community members raised concerns about the cost of the project and whether the business case 'stacked-up'. For recruited participants, the export of renewable energy making mainland costs cheaper but not having financial returns to Tasmanian and/or increasing local power costs was also raised.

However, economic growth and the use of local suppliers to provide project needs were both identified by recruited participants as positive economic impacts of the project.

Potential project impacts

Other potential impacts

Self-selected participants identified a number of other concerns about project impacts. These related to things such as: the liveability of the local area, property prices, health and wellbeing, traffic and road impacts during construction, and a negatively impacted local tourism industry.

Recruited participants raised visual impacts and the loss of productive agricultural land as potential outcomes of the project, however they also noted that blending infrastructure in with the natural environment could mitigate visual impacts.

Other engagement findings

Other matters the engagement with recruited participants identified include:

- **Quality of life ratings**

When asked to rate their current quality of life, recruited participants strongly rated the natural environment and community safety (including road safety and bushfire risk) as the most positive; and local employment and business opportunities, and housing affordability, as the least positive contributor to their quality of life.

- **Most pressing issue affecting the local community**

Unemployment was by far the most pressing local issue affecting the local community that recruited participants identified they were most concerned about, followed by the issue of housing affordability and availability.

TasNetworks
Delivering your power

MARINUS LINK

Other engagement findings

Mitigation ranking

When asked to rate the importance of five mitigations (from most to least important), outcomes were:

1. Protection of the natural environment
2. Creation of employment and business opportunities
3. Maintaining community safety
4. Protection of the area's visual landscape
5. Protection of the tourism industry.

TasNetworks
Delivering your power

MARINUS LINK

STAVERTON TO HAMPSHIRE HILLS – SOCIAL IMPACT ASSESSMENT ENGAGEMENT

Community Workshops Summary

March 2021

MAKING COMPLEX EASY

Overview

This document has been prepared to provide an overview of the two community workshops held to inform the development of the Social Impact Assessment (SIA) for the proposed Staverton to Hampshire Hills transmission line. The proposed new transmission line forms part of the North West Transmission Developments project, currently being progressed by TasNetworks.

These workshops were facilitated by RPS and supported by representatives from TasNetworks and Coffey, who are preparing the SIA.

The purpose of the workshops was to:

- Introduce participants to the SIA process
- Provide contextual information to participants so they could provide informed feedback
- Capture community feedback about the positive and negative impacts of the S-HH transmission line, and potential project risks
- Meet the commitment made by TasNetworks to return to the local community with montages of visual impacts
- Confirm the next steps in the SIA process, and identify further opportunities for the community to be involved.

Key themes and concerns identified during these workshops included:

- **Local community:** concerns about how the transmission line will impact on the liveability of the surrounding area, property prices, inter-community relationships and people's mental and physical health.
- **Tourism:** strong concern in the community that the transmission line will have a detrimental affect on local tourism and that it will tarnish the state's reputation and branding.
- **Environmental impacts:** many expressed concerns regarding increased fire risk and mitigations, impacts on flora and fauna, the karst system and water quality.
- **Economic impacts:** cost of the overall project (Project Marinus) and feeling there will be a lack of ongoing employment following construction.
- **Access:** concerns regarding access during construction, current condition of roads, construction of additional access roads.
- **Process:** some concerns in the community regarding the engagement and approvals process. Many participants are unsure of the approval process, and are frustrated with the perceived lack of consultation being undertaken.

Current status – Staverton to Hampshire Hills

The proposed new transmission line between Staverton and Hampshire Hills forms part of the North West Transmission Developments project, currently being implemented by TasNetworks.

TasNetworks consulted the community on the proposed route for the Staverton to Hampshire Hills section of the North West Transmission Developments in late 2019 and early 2020. Following initial consultation with the local community, the route was amended, and the preferred route was released in August 2020, including a Route Options Report.

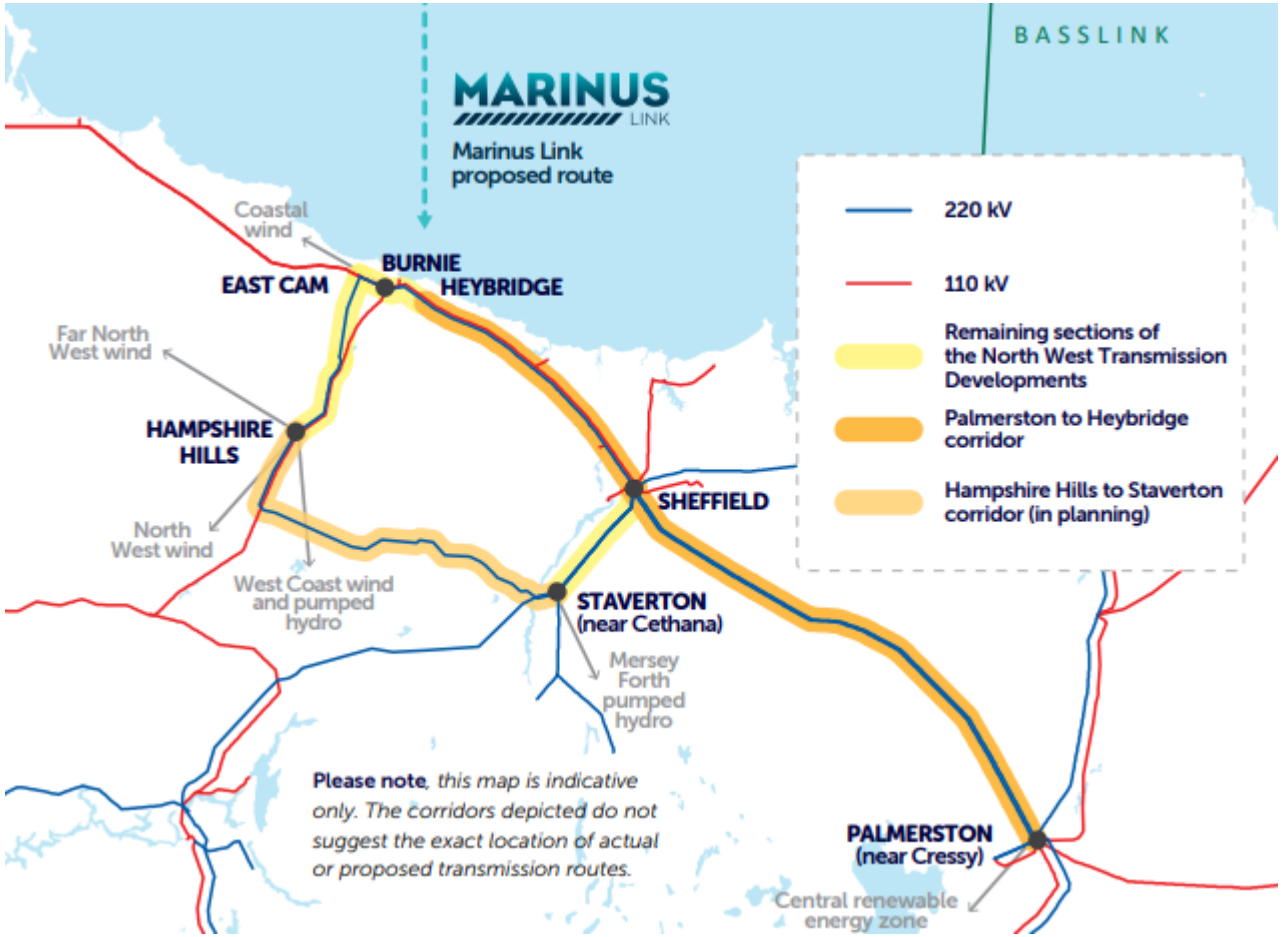
Work has now started on the Environmental Impact Statement (EIS) for this section of the project, due to be completed by late-2021. The EIS is a requirement under the *Major infrastructure Development Approvals Act 1999* criteria set by the Tasmanian Planning Commission.

The EIS will incorporate several assessments, including a Social Impact Assessment (SIA).

Two workshops were recently held in the north west region to collect qualitative data to inform the development of the SIA on the preferred route. Details for these workshops are below:

Saturday 20 March 2021
Preston Community Centre
1:00 pm – 3:00 pm

Sunday 21 March 2021
Wilmot Memorial Hall
1:00 pm – 3:00 pm



What is a Social Impact Assessment?

A Social Impact Assessment (SIA) is an assessment of the social consequences of a proposed decision or action, namely the impacts on affected groups of people and on their way of life, life chances, health, culture and capacity to sustain these. and is one of the many specialist studies (including environmental and economic studies) that contribute to the Environmental Impact Statement (EIS) submitted as part of the development application.

How does the SIA fit into the broader environmental approvals process?

The Tasmanian Planning Commission finalised the planning criteria for the North West Transmission Upgrades Project under section 12(5) of the *Major infrastructure Development Approvals Act 1999* on 1 February 2021.

This criterion outlines the requirements that TasNetworks must adhere to when preparing the EIS. These requirements have been set based on guidance provided by the Tasmanian Environment Protection Authority (EPA) and the Australian Department of Agriculture, Water and the Environment (DAWE).

What is assessed as part of a SIA?

The SIA will provide an insight into how the project might impact on people's way of life, culture, tourism, the local and wider community, the environment, people's health, landowner's personal and property rights, and community members' fears and aspirations.

What engagement has been done to inform the SIA?

As well as the community workshops, we carried out a telephone survey of 1000 people in north-west Tasmania who were generally representative of the local population. We also undertook four in-depth focus groups with survey participants.

HOW WE ENGAGED

Workshop One - Preston Community Centre – Saturday 20th March

The first workshop was held at Preston Community Centre on Saturday 20th March 2021, from 1:00 pm to 3:00 pm.

Attendees included 19 members and residents of several local communities including Burnie, Preston and Loongana. Including several councillors from Central Coast Council, as well as members of S.O.L.V.E. Tasmania, a community group opposed to the project. Project specialists from Coffey and TasNetworks supported the sessions, including members of the environment, engagement and engineering teams.

Participants were given an overview of the session and the project and took the opportunity to ask questions about the project, before participating in smaller table discussions regarding some of the social impacts identified.

Key themes identified during this workshop were that the local community are angry about the project, and felt their concerns are not being acknowledged. Participants also indicated that they were frustrated about the level of communication and engagement from TasNetworks.

Workshop Two - Wilmot Memorial Hall – Sunday 21st March

The second workshop was held at Wilmot Memorial Hall on Sunday 21st March 2021, from 1:00 pm to 3:00 pm. The workshop was attended by 23 members of the local community, including residents of Erriba, Loongana, Ulverstone and Wilmot. Representatives from Kentish Council and S.O.L.V.E. Tasmania were also in attendance. Project specialists from TasNetworks and Coffey supported the session, including members of the environment, engagement and engineering teams.

Consistent with the previous workshop, participants were given an overview of the session and the project. They took the opportunity to ask questions about the project, before participating in smaller table discussions regarding some of the social impacts identified.

Key themes identified as part of this workshop were that visual aspects were very important to the community and that the local community and nearby landowners are concerned regarding the impacts of the project on local tourism businesses and opportunities.

Participation

Over two days, forty-two people from local communities including Burnie, Erriba, Loongana, Preston, Ulverstone and Wilmot attended the workshops -19 at Preston and 23 at Wilmot.

Participants were asked to nominate their location on a map, in relation to the conceptual route. Participant locations are shown on this map.

WHAT WE HEARD

Key themes we identified

Several key themes and concerns were identified during the two workshops. These themes included:

1. Local community – it is evident that participants are concerned about how the transmission line will impact on the liveability of the surrounding area, property prices, inter-community relationships, and people's mental and physical health.

2. Tourism – there is a strong concern in the community that the transmission line will have a detrimental impact on local tourism, and that it will tarnish the state's reputation and branding.

3. Environmental impacts – many participants expressed concerns regarding fire mitigation, impacts on flora and fauna, the karst system and water quality.

4. Economic impacts – overall cost of the project (Project Marinus), concern regarding lack of ongoing employment.

5. Access – concerns regarding access during construction, current condition of roads, construction of additional access roads and anti-social behaviour arising from access to private property through access roads.

6. Process – many participants are unsure of the approvals process and are frustrated with the perceived lack of consultation.

Local community

We heard concerns from many of you about how this project will impact the local communities.

Many participants commented that the project has already had a detrimental impact on their local community, and that community division occurred during the route selection process.

Others indicated that they felt a sense of ‘survivor’s guilt’, as the changed route had moved the transmission line away from their communities but closer to others.

A significant number of participants shared that they are concerned about the transmission line causing property values to decrease, with some suggesting that the area would become an ‘industrial wasteland’ if the project was allowed to proceed.

There is a sense that the project has already impacted the community’s mental and physical health, with many participants indicating that the project has already had a negative impact on their personal wellbeing.

- “Friendships and alliances, and groups formed and destroyed”
- “Lots of people out here in the community that don’t really understand the impact on them”
- “I might not live here anymore but my family is here, I grew up there and I love to go and see it”
- “I have been deeply involved in all these issues for two years and it feels like an endless 'talkfest' - who actually cares?”
- “There is a lot of community angst, pitting neighbours against each other”
- “My children are witnessing further degrading of our world”
- “Anxious it will all be a white elephant”
- “Why is it coming down to the dollars over human life?”
- “Property values will decrease but [*project*] doesn’t reduce rates or land tax”
- “If one of your neighbours isn’t happy, then it affects you”
- “Long process disrupting daily lives”

Tourism

A significant number of participants indicated that one of their biggest concerns is the impact that the project will have on the local tourism industry, which relies heavily on interstate and international visitors.

Many of you told us that you had built your businesses on Tasmania's 'clean and green' brand, while others advised that they had put their business plans on hold as they felt they would fail immediately if the transmission line was built in its preferred location.

A number of business owners enquired as to what compensation would be available for loss of income following the construction of the transmission line, as they believe it will have an irreparable impact on tourism in the area.

- "Tourists want to see a pristine environment, not power lines"
- "Who pays me for destroying my tourism business?"
- "What about the Coast to Cradle tourism campaign?"
- "If we lose our tourism customers, it'll have a roll on effect on job losses"
- "Mega infrastructure violates the sense of place"
- "Coast to Canyon tourism brand is 16 years old, in partnership with Council, the airports and a large range of tourism attracting businesses that rely on that brand"
- "Undermining the 'clean green' image"
- "Lose future potential of Black Bluff/Leven Canyon area"
- "Tourism income benefits locals, energy income benefits others"
- "Our businesses have been built on visual aspects"
- "Our branding doesn't include transmission lines"
- "Tourism and agriculture the main economy"
- "How will you compensate businesses who can't operate because of safety?"

Environmental impacts

All participants expressed concern about the environmental impacts that the proposed line would have on the surrounding area. Concerns ranged from impacts on flora and fauna, a perceived increased fire risk and decrease of water quality, impacts on the karst system in Loongana, and ongoing impacts on the surrounding environment.

- “Organic and clean for organic farming”
- “Bushfires are already a source of stress”
- “Plantation won’t cover – can’t screen towers”
- “Wedge-tailed eagles have been sighted in this area”
- “Will all the destruction of forest, habitat and communities be for a Marinus 'white elephant’?”
- “I’m concerned about the impact on the karst systems – a full survey is required”
- “There is only one way in and one way out – what happens when there’s a fire?”
- “There is an increased fire risk to life, property, environment… one road in, one road out… at what point is it cost effective?”
- “The rainforest in this area is being undervalued”
- “A climate change report should underpin every other assessment”
- “Just because the loggers have damaged the valley doesn't mean it is degraded”
- “What will the impacts be on water quality from clearing and maintaining the line with no vegetation?”
- “Psychological benefits of the wilderness”
- “Will this open up more areas for logging?”
- “Herbicides used impacting water quality”
- “More time spent controlling weeds spreading along easement”

Economic impacts

Many participants questioned the financial implications of the transmission line against the impact on tourism and property prices, and enquired as to the economic benefits of the project overall.

- “90% of jobs are going offshore”
- “All of the infrastructure debt for Project Marinus – I’m yet to be convinced about the merits of the project for Tasmania/Australia and costs imposed on communities like us, for who?”
- “By the time Marinus Link is needed/built it will be obsolete”
- “Doesn’t weigh up – costing Tasmanians too much”
- “Monetary cost to Tasmanian taxpayers”
- “Who is paying for Marinus Link?”
- “What happens when the mainland grid and supply output reduces for the need for Tassie energy?”
- “Hydro Tasmania are sacking their workforce, what happened to ‘Battery of the Nation’?”
- “Impact on farmers lives while transmission line is being worked on”
- “Reduced income for nature-based tourist businesses”
- “Reduced visitation by high-end nature-based tourists”
- “What jobs are there for locals? Collecting dead eagles and other raptors that have collided with transmission lines?”
- “Where are the benefits that justify the costs/impacts?”
- “We’ll pay for it for generations”
- “Why is it coming down to the dollars over human life?”

Access

Members of the community shared stories of their properties being unlawfully accessed by tourists and visitors incorrectly using private access roads, with many telling told us that their fences had been cut by people visiting the area trying to access private property for recreational purposes.

The community is concerned that anti-social behaviour will escalate if the transmission line is installed, as there would be an increase in the number of access roads required to service the transmission line.

There is also a concern from the community that the local road network will become unsafe during construction, due to the increased heavy vehicle movements.

- “Why not use existing corridors instead of going through the bush?”
- “Tower to main road is better than along easement for access”
- “Loongana Road has karst underneath it so won’t be able to use explosives used to widen road (sic) – will cause landslide/landslip further down and destroy the caves”
- “Unless the road is widened, it’s dangerous”
- “Compare the cost of widening the road against using the Vale option”
- “Who will repair the road after construction?”
- “How will we go about our daily business during construction?”
- “How are you going to safely build it? Gatehouse Road is very narrow”
- “Uninvited access to private property via access roads”
- “We already deal with people cutting our fences, leaving their litter, riding their dirt-bikes, stolen cars being dumped… this will just bring more people up here”

Process

Many participants asked questions about the decision making process, of the transmission line against the impact on tourism and property prices, and enquired as to the economic benefits of the project as a whole.

- “90% of jobs are going offshore”
- “All of the infrastructure debt for Project Marinus – I’m yet to be convinced about the merits of the project for Tasmania/Australia and costs imposed on communities like us, for who?”
- “By the time Marinus Link is needed/built it will be obsolete”
- “Doesn’t weigh up – costing Tasmanians too much”
- “Monetary cost to Tasmanian tax payers”
- “Who is paying for Marinus Link?”
- “What happens when the mainland grid and supply output reduces for the need for Tassie energy?”
- “Hydro Tasmania are sacking their workforce, what happened to ‘Battery of the Nation’?”
- “Impact on farmers lives while transmission line is being worked on”
- “Reduced income for nature-based tourist businesses”
- “Reduced visitation by high-end nature-based tourists”
- “What jobs are there for locals? Collecting dead eagles and other raptors that have collided with transmission lines?”
- “Where are the benefits that justify the costs/impacts?”
- “We’ll pay for it for generations”
- “Why is it coming down to the dollars over human life?”

STAVERTON TO HAMPSHIRE HILLS TRANSMISSION LINE

SIA FOCUS GROUPS

Outcomes Summary

March 2021

MAKING COMPLEX EASY

Purpose and objectives

The purpose of this document is to provide a summary of the outcomes of the four focus groups RPS designed and delivered in March 2021 in support of the Staverton to Hampshire Hills (S-HH) Social Impact Assessment. Focus group outcomes will also inform the development of the community benefits sharing program.

The objectives of focus groups were to:

- Understand the factors that influenced the outcomes of the recent community survey
- Identify any significant differences in community views between those who live in the immediate proximity to the proposed S-HH transmission line and those who do not
- Collect qualitative data from local community members about:
  - What they value most about their local area and why it is important
  - The extent of the community issues identified in the survey within their local community, and the factors influencing them
  - How the perceived benefits of Marinus Link and the North West Transmission Developments could best be delivered
  - How the perceived disadvantages of Marinus Link and the North West Transmission Developments could best be addressed.

Focus group methodology

RPS delivered four community focus groups between Tuesday 23 March and Thursday 25 March, 2021. The sessions were delivered by experienced facilitators in accordance with an agreed runsheet, to ensure consistency across each group.

A total of 42 community members participated in the focus groups: these were broadly representative of the North West Tasmanian community, with participants ranging from 18 to 55+ in age, 55% identifying as female and 45% as male, and from locations including Burnie, Ulverstone, Perth, Westbury, Railton, Launceston, Forth, Easternport, Hadspen, Kingston, Kindred, Golden Valley, Wilmot, Somerset, Upper Burnie, Wynyard, and Devonport. Each participant was recruited through the recent community survey undertaken by EMRS and it is important to note that none of them lived in close proximity to the proposed S-HH transmission line.

After an initial introduction to the session, participants were invited to:

- Introduce themselves and share what they love most about their local area
- Explore why the matters the survey identified are valued most about the area are important
- Share their perspectives on the challenges facing the community the survey identified, their extent and contributing factors
- Reflect on the perceived benefits of the project and how they can be best delivered for the local community
- Reflect on the perceived disadvantage of the project and how they can be best addressed.

The following slides provide a summary of the consolidated outcomes of the four focus group discussions.

Focus group outcomes – Community values

When asked what they value most about their community, participants echoed the outcomes of the survey, listing connectedness to the land, nature and environment, sense of community and its support systems, and a relaxed, slower paced lifestyle as their most valued features.

Participants offered a range of reasons for why these features are important to them, with the most common answers being:

Connectedness to land, nature and environment

- Supports good physical and mental health
- Proximity to outdoor activities like hiking, swimming at the beach, or mountain biking
- Being amongst nature teaches the community how to protect it
- Tourism drawcard for Tasmania

Sense of community and its support systems

- Feeling of belonging
- Neighbourhood support, and reciprocity amongst the community
- Sense of trust and safety
- Connection between community and environment

Relaxed, slower paced lifestyle

- Being part of the natural environment, leading a more ‘natural’ life
- Choice in pace of life
- Good for raising families
- Friendliness of local people

Other common answers included having variety in local landmarks, not having barriers to accessing the natural environment, and being able to maintain community groups like surf lifesaving, guides, clean up groups and sporting groups.

Focus group outcomes – Community concerns

To inform a discussion about community concerns, the most common concerns raised in the survey were described to participants. These concerns consisted of unemployment, housing affordability and housing choice, and limited access to transport infrastructure.

Participants were asked whether they agree with these concerns, and if so, what their experience of these concerns has been. The most common responses included:

Unemployment

- Job opportunities for young people are limited, and there is not enough variety in what is available
- Education and employment opportunities are clustered in the large centres like Launceston, requiring young people to move away from home and rent in order to work
- Limited transport is a barrier to employment, particularly for people who don't drive
- There is a mismatch between skills in the community and available jobs

Housing affordability and choice

- There is far more demand for housing than supply, making it hard for renters and buyers to secure housing
- The imbalance between demand and supply is driving housing prices upward for renters and buyers
- An increase in privately sold houses means the quality of rental properties is dropping
- There are long waiting lists for government housing
- It is hard to get tradesmen, and houses are not being built

Transport

- The public transport system changes frequently, making it hard for people to access, particularly those with a disability or reduced mobility
- There is limited public transport available
- Local people are forced to drive by the lack of infrastructure
- There is confusion about whether road upgrades are a Federal, State or Council responsibility, and a perception that federally funded roads have larger upgrade budgets than local roads

Focus group outcomes – Perceived advantages of Marinus Link/NWTD

After sharing the survey results of perceived project advantages, participants were asked what kind of advantages they see in Marinus Link. Participants broadly supported the project, usually with the caveat that it must not negatively impact the local environment or local communities. The most commonly-referenced perceived advantages included:

- Cheaper, or free power for Tasmanian businesses and residents
- Short and long-term employment for local Tasmanians
- Income stream for Tasmania
- A chance for Tasmania to become a world leader in doing clean energy in the least impactful, most beneficial way.

Other advantages mentioned by focus groups included energy security, diversification of energy resources and economic/business growth in Tasmania as a flow-on from the project.

Additionally, one focus group saw Marinus Link as an opportunity for Tasmania to lead Australia, and perhaps the world, in clean energy. These participants were excited by the idea that Tasmania would be producing something that is vital to the mainland and could benefit their future generations. They stated that if Marinus is “done right” with limited impact to environment and community, it could be a “world-class project” that draws tourism to the state.

Focus group outcomes – Perceived project benefits

There's going to be construction so there will be labour jobs, they'll be using local suppliers, local transport, local roadhouse, fuel, cars, housing etc. It's all dollar spend, and dollars spent in Tasmania count a lot. - Focus group one, 23 March

We're going to need to diversify our energy resources. There is potential for thermal, nuclear, wave energy. Tasmania will play a huge part in our electrical future. Could be a new export market if we begin to supply renewable to our neighbours in south east Asia. - Focus group one, 23 March

Tas can lead the way for Australia in a resistant mindset currently held by politicians and leaders. If we can do it right, it might tip the scale a bit towards clean energy, particularly with more people looking for it on the mainland. Could set a good example for the mainland. - Focus group three, 24 March

We can make an outstanding project that is world-class and is still sensitive to the environment so that other people want to know about it. - Focus group three, 24 March

Create awareness that clean energy matters. Demonstrate that we as a state stand firm on this – we can lead the way. Local communities can begin to have a greater buy in - think loving our community, thinking long-term, seeing desire for growth. - Focus group three, 24 March

Based on projects in the past and there is electricity shortage so not only getting more capacity but more security. Energy security and capacity important. - Focus group two, 23 March

There's an opportunity for Tas to play with the big boys and produce something that is of large benefit to mainland Australia. - Focus group three, 24 March

This company can't play lip service about this being good for us. It needs to set an example of genuinely caring for the environment, being a sustainable project. A project our grandchildren will benefit from and be proud of in the future. - Focus group three, 24 March

We can leverage the clean, green image of Tasmania. If we have longevity in Tas, we can be seen as open to green initiatives and infrastructure. Flow on effect could be for decades rather than just this short-term project. We could attract other global renewable energy projects. - Focus group four, 25 March

Focus group outcomes – Realising the benefits

Participants saw local employment as the most beneficial way to realise the positive benefits of Marinus Link, followed by economic growth and development.

Multiple participants urged Marinus Link to put in place traineeships, university degrees and other educational and training opportunities now, so that a local skilled workforce will be available to the project when construction is ready to begin. A strong message was that employment was only a benefit if jobs were filled by local community members.

Other frequent suggestions for realising the benefits of the project included:

- Employing local communities along the transmission line to conduct the ongoing line maintenance rather than outsourcing to an external workforce
- Offering cheaper energy to Tasmanians to encourage businesses, other projects to move into Tasmania
- Using local suppliers for materials (e.g. diesel, earth moving, food etc.)
- Allocating money to local transport infrastructure as a benefit for the project and the local community
- Communicating with the local community in a way that is expressive and playful (feedback was that so far communications have been “academic”, “dry” and “full of facts and figures”)
- Blending infrastructure in with the natural landscape, and build in crossings for local wildlife
- Avoiding contributing to the housing shortage – consider building new housing for workers with the view of them becoming rentals or community housing later down the track (jobs going to outsiders was identified as a risk for housing affordability and availability)
- Ensuring diversity in the workforce, including age, gender, CALD etc.

Focus group outcomes - Perceived disadvantages of Marinus Link/NWTD

After sharing the survey results of perceived project disadvantages, participants were asked to describe what kind of disadvantages they see in Marinus Link. The most frequent answers were:

- Impacts on the natural environment, including both the terrestrial and the marine environment
- Impacts on land and marine wildlife
- Employment disappearing when the project finishes, similarly to what has happened to local communities in the past when large business has concluded and left the area.

There was frequent concern amongst participants that Tasmania's renewable energy would be exported to the mainland to make mainland energy cheaper, and that Tasmania would not see any financial returns.

Other disadvantages mentioned included expenditure for Tasmania, and whether the business case stacks up, the construction of large substations in Tasmania, and whether automation would take the place of human jobs and limit employment opportunities for local Tasmanians.

Focus group outcomes – Perceived project disadvantages

This project won't employ many people especially once the Link is in place. It will be very automated. - Focus group one, 23 March

Bit concerned about financial viability over time and the recent power off in South Australia where panels turned off due to lack of need of power. Need to ensure financially viable and there is demand. Who will bear the cost? - Focus group two, 23 March

Agree with the comment about education and knowing more about it and putting more information out there so people know what is happening and when it is happening. - Focus group two, 23 March

I'm concerned when native forest is cleared, concerned when we feel it is ok to just carve another pathway through native forest. We have a necessity for carbon storage on the planet, it's paramount and Tas is well placed to contribute positively in that department. It's not productive to cut carbon capture capacity to install renewable energy. - Focus group three, 24 March

Often large industries have dominated our area (e.g. hydro, forestry), owned by overseas interests, people come in to work from outside of the local area. We're impacted by multinational corporations and large industry. Need to broaden the scope of how people can tap into what we have here to meet their potential. It's damaging when large industry closes. - Focus group three, 24 March

We need a plan around removing it if it doesn't work anymore, isn't in use anymore. Tasmanians have been left with eyesores when projects have ceased to exist. Expect clean up to be part of it. - Focus group four, 25 March

Hard to get rentals, landlords have too much choice. Hard for young people to get into the property market. COVID has made this worse. People move to Tassie and buy rentals, leaving less on the market. - Focus group four, 25 March

Focus group outcomes – Mitigating the negative impacts

Participants provided a range of ideas for how to mitigate the perceived negative impacts of Marinus Link. These included:

- Working closely with and listen deeply to local communities, including the local aboriginal people
- Being sensitive to the environment and local wildlife and endangered species
- Repairing trust in the project and encouraging community ownership
- Committing to removing infrastructure if the project does not go ahead or at the end of project life so that there is not a lasting negative impact long into the future
- Developing relationships with the education sector and resources in Tasmania now to start building the right local capacities and skill-sets
- Seeking to provide long term employment where possible, not just for the life of construction

Key conclusions

During focus group discussions comments made by participants indicated a strong correlation with the survey outcomes. These results indicate:

- Being connected and having easy access to the natural environment, belonging to a close-knit, connected community and enjoying a more relaxed, rural lifestyle strongly contribute to the quality of life for communities in North-West Tasmania
- A number of systemic issues negatively impact quality of life, including: low levels of local employment opportunities, particularly for younger people, the lack of available and affordable housing, and inadequate public infrastructure, particularly the lack of public transport which disproportionately affects younger people who cannot afford a car or do not drive
- Local employment opportunities are by far the most commonly perceived value of the project, however new jobs will only be a benefit and of maximum value if those jobs are available to the existing community. Having jobs filled by mainlanders/FIFO workers will not only reduce the benefits of the project to the local community but exacerbate local housing issues. Consequently, undertaking the necessary work now to ensure an appropriately skilled local workforce is critical to delivering the project well
- Delivering the project with the best environmental outcomes possible will be another critical factor in project success. Not only will this ensure the impact of the project on the natural environment, both terrestrial and marine, is as limited as possible, it will also contribute to being able to use the project to promote Tasmania as a leader in renewable energy projects and attract further investment

Get in touch

If you would like to receive news about the project and community engagement activities, visit: talkwithtasnetworks.com.au and register for updates.

We welcome you to contact us with further concerns or information.

Call 1300 127 777
Email projectmarinus@tasnetworks.com.au
Web talkwith.tasnetworks.com.au

RPS Group

Marinus Link Research

Quantitative Research Report

emrs

enterprise marketing & research services

March 2021

emrs

enterprise marketing & research services

This report has been prepared by
Enterprise Marketing and Research Services
60 Main Road, Moonah TAS 7009

All enquiries should be addressed to:

Paul Jamrozik
Research Manager
EMRS
PO Box 402
Moonah TAS 7009

Phone: (03) 6211 1222
Fax: (03) 6211 1219
Email: paul.jamrozik@emrs.com.au

Contents

Contents

Section One

Executive Summary

Executive Summary

Introduction to the Research

Marinus Link is a proposed 1500-megawatt capacity undersea and underground electricity connection to further link Tasmania and Victoria as part of Australia's future electricity grid. Marinus Link will be supported by transmission network developments on the North West Tasmanian electricity network. The proposed route for the Marinus Link will run from this region of Tasmania to the Latrobe Valley in Victoria.

In order to evaluate the current level of community awareness and perceptions of the Marinus Link, the RPS Group assigned EMRS, the independent research firm, to design and implement a research project gathering feedback from the adult population resident in the North and North West Tasmanian locations relevant to the proposed route.

EMRS undertook the design and conduct of the research, in close consultation with the RPS Group, along with the responsibility for full analysis and reporting on the data gathered.

EMRS adopted a quantitative survey methodology to collect the required data, utilising a mixed-methods approach: namely, Computer Assisted Telephone Interviewing (CATI) coupled with an equivalent online survey. The fieldwork took place from the 1st to the 17th of March 2021. The target sample size was achieved, with n=1,000 Tasmanian adults aged 18 years and over being successfully surveyed.

The following report presents the findings of the community research to determine awareness of the Marinus Link project and its perceived effects on the community. The data gathered and analysis of the results are provided in detail in the body of the report, while this summary presents the key informational insights gained.

Executive Summary

Aspects Most Valued about Life in the Local Area

The respondents were asked, without prompting, what they most valued about life in their local area. Most frequently mentioned were:

- *Sense of community* (34%)
- *Close to the natural environment* (22%)
- *Relaxed/ quiet/ rural* (20%)

followed by

- *Clean environment* (13%)
- *Family friendly environment* (13%)
- *Open spaces and parklands* (12%)
- *Safe and secure* (11%)

The Most Pressing Issues or Challenges Affecting the Local Community

Unprompted, by far the most pressing issue or challenge cited was:

- *Unemployment* (31%)

followed by

- *Housing affordability/ housing choice* (17%)
- *Insufficient community services – e.g. health, hospital* (12%)
- *Transport infrastructure – e.g. roads, footpaths, public transport* (11%)
- *Limited quality education and training opportunities* (10%)

Rating Quality of Life in Relation to Specified Elements

The respondents were then prompted with a list of 7 elements and asked to rate their current quality of life in relation to each. Using a scale from 0 ("terrible") to 10 ("excellent"), the top quality of life **average score out of 10** was:

- **8.2 – Natural environment**

followed by

- **7.4 – Community safety including road safety and bushfire risk**
- **7.1 – Recreational and leisure opportunities**
- **6.6 – Strength of the local economy**
- **6.4 – Education and training opportunities**
- **5.6 – Housing affordability**
- **5.6 – Local employment and business opportunities**

See pp.10 – 11 for a full breakdown and analysis of the rating scores given.

The Issues or Challenges of Most Concern

The issues or challenges most likely to be **ranked first** as of most concern were:

- *Unemployment* (18%)

followed by

- *Housing affordability/ housing* (10%)

The responses here confirmed the aspects the respondents were most likely to perceive as challenging their community: namely, local "unemployment" and "housing affordability/ housing".

Executive Summary

What a Benefactor Could Deliver to Most Benefit the Community

Without prompting, the respondents were most likely to nominate:

- *Community services – e.g. health, hospital* (19%)
- *Activities/ facilities for young people* (13%)
- *Education and training opportunities* (13%)
- *Better roads/ pavements/ transport infrastructure* (12%)
- *Local employment opportunities* (12%)
- *Community facilities* (11%)
- *Affordable housing/ more housing choice* (10%)

Prompted Awareness of Project Marinus Once Named

Once prompted with the name 'Project Marinus', total awareness stood at close to one in four of the full sample.

- **23% - TOTAL AWARE**
  - 11% "definitely aware"
  - 12% "somewhat aware"
- **73% - TOTAL UNAWARE**
- 4% - "unsure"

Unprompted Awareness of Significant Infrastructure Projects in the Area

In order to determine unprompted awareness of the Marinus Link, the respondents were asked whether they could name any significant current or proposed infrastructure projects in the broader area that they lived in. Among the majority of the sample that stated "yes" and went on to name one or more such projects (n=617), most frequently mentioned were:

- *Roadworks/ roads* (16%)
- *University/ campus/ accommodation – Burnie, Launceston* (14%)

The remaining projects specified were each mentioned by small samples of 8% or less, including:

- *Marinus Link/ cable to Victoria* (3%)

Unprompted Awareness of Who is Responsible for Project Marinus

The sample stating they were aware of Project Marinus, and also of who was responsible for the project (n=87), were most likely to mention:

- *Tasmanian Government* (42%)

followed by

- *Federal Government* (21%)
- *TasNetworks* (19%)
- *Hydro Tasmania* (13%)

Executive Summary

Unprompted Awareness of What Project Marinus Involves

The majority of respondents aware of Project Marinus (n=243) were able to correctly identify at least one aspect of what the project involves without further prompting. Most frequently cited were:

- *Proposal for a Bass Strait link/ second link/ interconnector/ energy cable* (38%)
- *Link between Tasmania and Victoria* (38%)
- *Link transmitting power/ energy* (32%)
- *Connecting Tasmania to the mainland's National Electricity Market/ NEM* (21%)
- *Transmitting Tasmania's lower cost/ renewable energy generation* (13%)

Perceived Benefits or Positive Impacts of Project Marinus for the Community

The sample aware of Project Marinus (n=763) were most likely by far to regard the following as its main benefit or positive impact:

- *Employment* (30%)

followed by

- *Economic growth – local/ state/ national* (14%)
- *Renewable energy opportunities/ clean energy generation* (10%)
- *Cheaper electricity* (10%)

Whilst in a minority, a not insignificant proportion thought there were **"none/ see no benefits/ positives" (28%)**.

Prompted Awareness of Project Marinus Once Described

On being read a description of what Project Marinus involves, the majority of respondents previously unaware of the project (n=757) now confirmed that they could recall it.

- **65% - YES AWARE**
- **31% - NO UNAWARE**
- 3% - "unsure"

Combining unprompted and prompted awareness yielded a **high total awareness level of 73%** of the full sample of respondents.

Perceived Disadvantages or Negative Impacts of Project Marinus for the Community

The sample (n=763) were most likely to regard the following as its main disadvantages or negative impacts:

- *Increase in power costs for Tasmanian households* (15%)
- *General environmental impacts* (14%)

Positively, a significant proportion thought there were **"none/ see no disadvantages/ negatives" (33%)**.

See pp.22 – 23 for further perceived benefits/positive impacts and perceived disadvantages/ negative impacts each mentioned by small samples of 6% or less.

Executive Summary

Perceived Potential Risks of Project Marinus for the Community

The respondents aware of Project Marinus (n=763) were also asked whether they thought it would pose any potential risks for the community.

- **21% - YES**
- **66% - NO**
- 14% - "unsure"

Positively, the majority of respondents did **not** think Project Marinus would pose any potential risks.

The sample who thought there were potential risks (n=143) were most likely to mention:

- *Environmental degradation/ spoiling the environment* (39%)
- *High cost/ low benefit* (35%)

followed by

- *Some bearing more of the negative impacts and others less* (11%)

Awareness of the Staverton to Hampshire Hills Transmission Line and its Preferred Route

On the respondents aware of Project Marinus (n=763) being asked whether they were aware of the proposed Staverton to Hampshire Hills transmission line and its preferred route, the responses were:

- **36% - TOTAL YES AWARE**
  - 13% "yes - definitely aware"
  - 23% "yes - somewhat aware"
- **62% - TOTAL NO UNAWARE**
- 3% - "unsure"

See pp.27 – 28 for further perceived benefits/positive impacts and perceived disadvantages/ negative impacts each mentioned by small samples of 5% or less.

Perceived Benefits or Positive Impacts of the Transmission Line for the Community

The sample aware of the transmission line (n=280) were most likely by far to regard the following as its main benefit or positive impact:

- *Employment* (23%)

followed by

- *Economic growth – local/ state/ national* (10%)

Perceived Disadvantages or Negative Impacts of the Transmission Line for the Community

The sample (n=280) were most likely to regard the following as its main disadvantages or negative impacts:

- *General environmental impacts* (25%)
- *Visual landscape/ scenery impacts* (17%)
- *Loss of productive/ agricultural land* (11%)

Executive Summary

Perceived Potential Risks of the Transmission Line for the Community

The respondents aware of the Staverton to Hampshire Hills transmission line (n=280) were also asked whether they thought it would pose any potential risks for the community.

- **22% - YES**
- **69% - NO**
- 9% - "unsure"

Positively, the majority of respondents did **not** think the transmission line would pose any potential risks.

The sample who thought there were potential risks (n=58) were most likely by far to identify:

- *Environmental degradation/ spoiling the environment* (51%)

followed by

- *Fire risks* (22%)
- *Health risks* (19%)
- *Damage to farming land* (11%)

Ranking of the Importance of Potential Impacts of the Transmission Line on the Local Area

The respondents were then prompted with a list of 5 potential impacts of the transmission line and asked to rank them in importance. Using a scale from 1 ("most important") to 5 ("least important"), the top **average importance score out of 5** (and most likely by far to be ranked highest with a score of "1") was:

- **2.4 – Protection of the natural environment** (42% - "1"; 12% - "5")

followed by

- **2.8 – Creation of employment and business opportunities** (26% - "1"; 20% - "5")
- **3.0 – Maintaining community safety** (16% - "1"; 17% - "5")
- **3.1 – Protection of the area's visual landscape** (9% - "1"; 18% - "5")
- **3.6 – Protection of the tourism industry** (7% - "1"; 33% - "5")

The results here revealed the primary importance to the Tasmanian community resident in locations relevant to Project Marinus and the proposed transmission line of measures being put in place to avoid the risk of potential degradation of the natural environment and ensure its protection.

In addition, reinforcing key community concerns established previously in the survey, the high importance placed here on the creation of employment and business opportunities was again to be noted.

NOTE: The lower the average score, the more important the potential impact was considered. See p.30 for a full breakdown and analysis of the ranking scores given.

Section Two

Introduction

Research Background, Scope and Aims

Background to the Research

Marinus Link is a proposed 1500-megawatt capacity undersea and underground electricity connection to further link Tasmania and Victoria as part of Australia's future electricity grid. Marinus Link will be supported by transmission network developments on the North West Tasmanian electricity network.

The proposed route for the Marinus Link will run from North West Tasmania to the Latrobe Valley in Victoria. In order to evaluate the current level of community awareness and perceptions of the Marinus Link in North and North West Tasmania in locations relevant to the proposed route, the RPS Group assigned EMRS, the independent research firm, to design and implement a research project gathering feedback from the Northern and North Western Tasmanian adult population to determine the levels of awareness of the project, and its perceived effect on the community.

EMRS undertook the design and conduct of the research, in close consultation with the RPS Group, along with the responsibility of full analysis and reporting on the data gathered.

Scope and Aims of the Research

Using a quantitative methodology, the scope of the research was to gather in-depth feedback from the target population via a mixed-methods approach, combining both a telephone survey and an online survey, with the broad key aims of the research being to determine:

1. General community perceptions of life in the local area;
2. Unprompted awareness of Project Marinus;
3. Prompted awareness of Project Marinus;
4. Perceptions of Project Marinus and its effects on the community;
5. Perceptions of the Staverton to Hampshire Hills line and route; and
6. Interest in future involvement in community consultation.

Objectives of the Research

Objectives of the Research

More specifically, the informational objectives were to establish:

- What is most valued about life in the local area;
- The rating of quality of life in the local area in relation to specific elements;
- The most pressing issues or challenges affecting the community;
- In what way a benefactor to the area could deliver the most community benefit;
- Unprompted awareness of any significant infrastructure projects that are being undertaken or proposed in the broader local area;
- The level of awareness of Project Marinus, including who is responsible and what it involves;
- Prompted recall of Project Marinus;
- Unprompted perceptions of:
  - Potential benefits/ positive impacts and disadvantages/ negative impacts of the Marinus Link and the North West Tasmania transmission developments, and
  - Potential risks associated with Project Marinus;
- Awareness of the proposed Staverton to Hampshire Hills transmission line and its preferred route;
- Unprompted perceptions of:
  - Potential benefits/ positive impacts and disadvantages/ negative impacts of the Staverton to Hampshire Hills transmission line, and
  - Potential risks associated with the Staverton to Hampshire Hills transmission line;
- Ranking of the importance to the local area of prompted potential impacts of the Staverton to Hampshire Hills transmission line.

Research Methodology (1)

Research Methodology

In order to collect the required information to meet the specified objectives, EMRS used a quantitative research methodology, implementing a mixed-methods approach: namely, Computer Assisted Telephone Interviewing (CATI) coupled with an equivalent online survey. The method of data collection was via a survey questionnaire of around 12 minutes in length. The data was collected by means of EMRS' own in-house research capabilities, thus enabling the progress and content of the data collection to be closely monitored throughout and ensuring quality control.

In order to gain results representative of the target population, quotas were put in place for gender, age and region. Where it was not possible to meet the set quotas, weighting was applied to the data gathered, so that the results reflected as closely as possible the demographic profile of the Tasmanian adult population in accordance with the latest 2016 ABS census.

The fieldwork took place from the 1st to the 17th of March 2021. The target sample size was achieved, with a total of n=1,000 Tasmanian adults aged 18 years and over being successfully surveyed.

The Confidence Interval

The total size of the target adult population to be surveyed was n=72,414. With a total sample size of n=1,000 successfully completed surveys, the maximum margin of error at a 50% result is ± 3.08 percentage points at the 95% confidence level.

Thus, **the confidence interval at a 50% result is 46.92%** (= lower bound: 50 - 3.08) **and 53.08%** (= upper bound: 50 + 3.08).

NOTE: This is the confidence interval for the results **where the full sample of n=1,000 answered the question**. In the instances where samples less than n=1,000 answered the question, **the confidence interval will be greater than ± 3.08 percentage points, varying according to the sample size in each instance**.

Research Methodology (2)

Reporting on the Results

Where percentages do not sum to 100, this may be due to rounding or where respondents were able to give multiple responses. Throughout the report, an asterisk(*) denotes the reason for the results not summing to 100 per cent.

Any table cells that have been highlighted in colour indicate a statistically significant variation in the results, most notably with green-highlighted cells denoting a significantly more positive result and pink-highlighted cells denoting a significantly less positive result. Blue-highlighted cells indicate a significantly higher percentage figure.

The following report presents the findings of the quantitative research to assess the current level of community awareness and perceptions of the Marinus Link Project in the areas along the proposed route. The research results have been presented predominantly in charts and tables. Any statistically significant variations in the results across the population subgroups have been remarked upon in the accompanying analytical commentary.

The People Surveyed (1)

The People Surveyed

In total, n=1,000 Tasmanian adults were surveyed. These tables provide a breakdown of the population subgroups.

Table 1 – Gender Identity
(Number and percentage of respondents)†

Gender Identity	Number	Percentage
Total	1,000	100
Male	412	41
Female	588	59

Table 2 – LGA
(Number and percentage of respondents)†

LGA	Number	Percentage
Total	1,000	100
Burnie	210	21
Central Coast	226	23
Kentish	79	8
Meander Valley	203	20
Northern Midlands	132	13
Waratah-Wynyard	150	15

Table 3 – Age
(Number and percentage of respondents)†

Age	Number	Percentage
Total	1,000	100
18 to 24 years	67	7
25 to 34 years	108	11
35 to 44 years	90	9
45 to 54 years	141	14
55 to 69 years	291	29
70 years or over	303	30

†Number and percentage figures in these tables are unweighted.
Elsewhere in the report, the percentage figures have been weighted accurately to reflect the demographic profile of the target Tasmanian population according to gender, age and region.

The People Surveyed (2)

Table 4 – Household Situation
(Number and percentage of respondents)†

Household Situation	Number	Percentage
Total	**1,000**	**100**
Single, never married	**107**	**11**
A couple with no children	**81**	**8**
Family, no children over 16	**144**	**14**
Family, children over 16 at home	**139**	**14**
Married, no children at home	**300**	**30**
Widowed	**123**	**12**
Sole parent	**23**	**2**
Separated or divorced	**75**	**8**
Declined to answer	8	1

Table 5 – Employment Status
(Number and percentage of respondents)†

Employment Status	Number	Percentage
Total	**1,000**	**100**
Employed full-time or self-employed	**320**	**32**
Employed on a part-time basis	**155**	**16**
Engaged in home duties	**43**	**4**
Retired or on a pension	**410**	**41**
Unemployed	**51**	**5**
A student	**14**	**1**
Declined to answer	7	1

†Number and percentage figures in these tables are unweighted.
Elsewhere in the report, the percentage figures have been weighted accurately to reflect the demographic profile of the target Tasmanian population according to gender, age and region.

The People Surveyed (3)

Table 6 – Household Income
(Number and percentage of respondents)*†

Household Income	Number	Percentage
Total	**1,000**	**100**
Under $20,000	**95**	**10**
$20,000 and under $40,000	**245**	**25**
$40,000 and under $60,000	**139**	**14**
$60,000 and under $80,000	**107**	**11**
$80,000 and under $100,000	**81**	**8**
$100,000 and under $120,000	**63**	**6**
$120,000 and over	**117**	**12**
Declined to answer	153	15

*Percentages do not sum to 100 due to rounding.

†Number and percentage figures in this table are unweighted.
Elsewhere in the report, the percentage figures have been weighted accurately to reflect the demographic profile of the target Tasmanian population according to gender, age and region.

Section Three

General Community Perceptions of Life in the Local Area

Aspects Most Valued about Life in the Local Area

Chart 1 –Aspects Most Valued about Life in the Local Area (Percentage of all respondents)*

*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" which was an exclusive answer.

Without prompting, the respondents were most likely to mention the "sense of community" as the aspect they most valued about life in their local area (34%).

High rates of mention were also recorded for being "close to the natural environment" (22%), and "relaxed/ quiet/ rural" (20%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

"Other" responses each mentioned by 2% of respondents or less included:

- *"Close to work/ commute/ no traffic", "housing affordability/ access to housing", "friends and family in the area", "sporting opportunities", "weather", and "beauty of the area".*

Q. Thinking generally, what do you value most about life in your local area?

Rating Quality of Life in Relation to Specified Elements (1)

Table 7 – Rating Quality of Life in Relation to Specified Elements
(Percentage of respondents who provided a rating score)*

Element	RATING OF ELEMENT											
	10 Excellent	9	8	7	6	5	4	3	2	1	0 Terrible	AVERAGE
Natural environment (n=991)	25	20	29	14	4	6	1	0	1	0	0	8.2
Community safety including road safety and bushfire risk (n=990)	9	17	34	17	8	9	2	2	1	1	1	7.4
Recreational and leisure opportunities (n=984)	11	14	25	18	10	12	4	2	2	0	1	7.1

On being prompted with a list of specified elements and being asked to rate their current quality of life in relation to each, the respondents were most likely by far to give the "natural environment" the top scores of '8', '9' or '10', with the responses overall yielding the highest quality of life average score of 8.2 out of 10.

High scores of '8' or '9' were also given with significant frequency in relation to "community safety including road safety and bushfire risk". This element recorded the second highest quality of life average score (7.4 out of 10), followed by "recreational and leisure opportunities" (7.1 out of 10).

Across the population subgroups, there were no significant variations to be noted on comparing the responses in relation to the above elements.

*Percentages do not sum to 100 as respondents who were unable to rate the element have not been included in this table.

Q. How would you rate your current quality of life in relation to each of the following elements, on a scale from zero to 10, where zero is "terrible" and 10 is "excellent".

Rating Quality of Life in Relation to Specified Elements (2)

Table 7 (cont'd) – Rating Quality of Life in Relation to Specified Elements (Percentage of respondents who provided a rating score)*

Element	RATING OF ELEMENT											
	10 Excellent	9	8	7	6	5	4	3	2	1	0 Terrible	AVERAGE
Strength of the local economy (n=947)	4	7	22	26	16	16	4	3	1	0	1	**6.6**
Education and training opportunities (n=925)	5	7	23	21	13	16	6	3	3	1	3	**6.4**
Housing affordability (n=933)	5	5	13	16	15	18	8	10	5	3	3	**5.6**
Local employment and business opportunities (n=909)	4	3	12	19	15	19	10	8	5	2	2	**5.6**

Low scores of '2', '3' or '4' tended to be given significantly more frequently in relation to "local employment and business opportunities", and a low score of '3' in relation to "housing affordability". In addition, these two elements recorded the lowest quality of life average scores (5.6 out of 10 in each case).

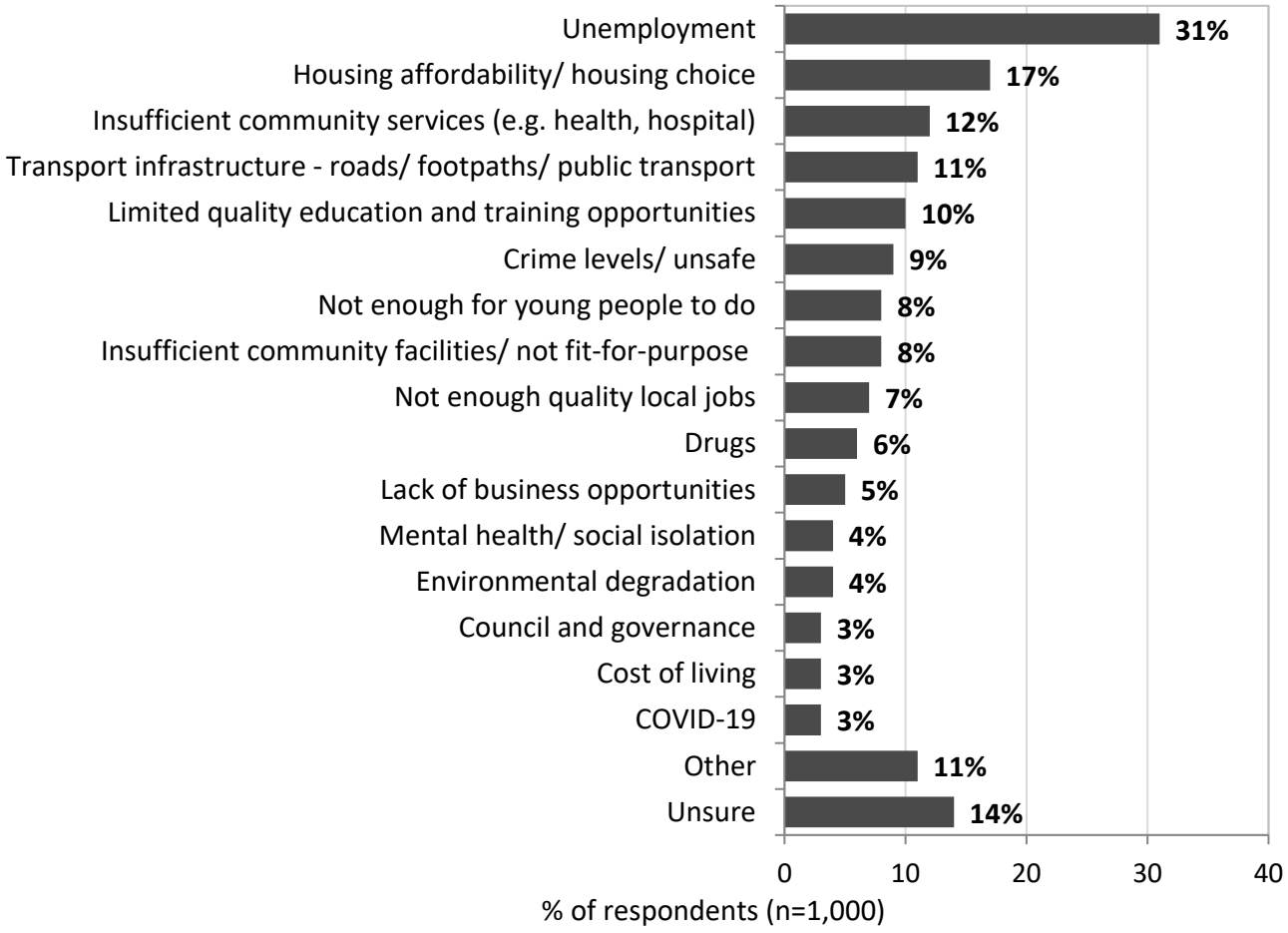
Across the population subgroups, respondents in the Meander Valley were the most likely to give the **lowest score of '0'** in relation to "local employment and business opportunities" (6%).

*Percentages do not sum to 100 as respondents who were unable to rate the element have not been included in this table.

Q. How would you rate your current quality of life in relation to each of the following elements, on a scale from zero to 10, where zero is "terrible" and 10 is "excellent".

The Most Pressing Issues or Challenges Affecting the Local Community

Chart 2 – The Most Pressing Issues or Challenges Affecting the Local Community (Percentage of all respondents)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" which was an exclusive answer.

Without any prompting, by far the most pressing issue or challenge cited by respondents was "unemployment" (31%).

"Housing affordability/ housing choice" recorded the next highest rate of mention (17%).

There were no significant findings to be noted in the responses across the population subgroups.

"Other" responses each mentioned by 2% or less included:

- *"Proposed prison in the area", "aged care", "tourism", and "climate change".*

Q. What would you say are the most pressing issues or challenges affecting your local community?

The Issues or Challenges of Most Concern

Table 8 – The Issues or Challenges of Most Concern
(Percentage of respondents identifying issues or challenges affecting the local community)*†

Issue or Challenge of Most Concern	RANKED FIRST
	%
Unemployment (n=186)	18
Housing affordability/ housing (n=90)	10
Insufficient community services – including health, hospitals (n=66)	6
Crime levels/ unsafe (n=48)	5
Transport infrastructure – roads/ footpaths/ public transport (n=51)	5
Drugs (n=32)	4
Not enough for young people to do (n=34)	4
Limited quality education and training opportunities (n=32)	4
Insufficient community facilities/ not fit-for-purpose (n=30)	3
Mental health/ social isolation (n=30)	3
Not enough quality local jobs (n=27)	3

*Multiple responses were possible.
†Percentages do not sum to 100, as issues mentioned by less than 3% of respondents, and those stating "unsure", have not been included in this table.

The responses here confirmed the issue or challenge that was of most concern to respondents, namely "unemployment", nominated by 18%.

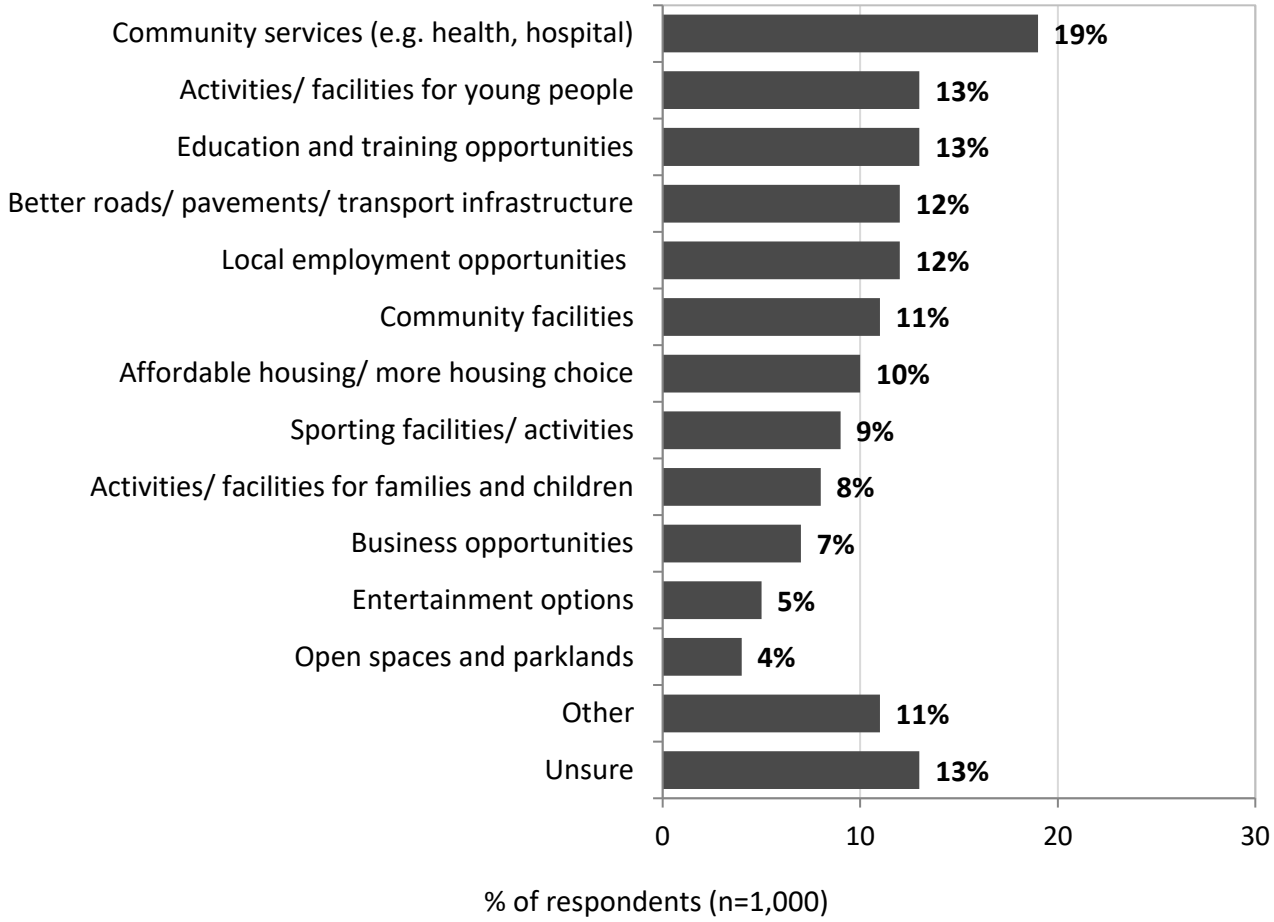
"Housing affordability/ housing choice" again recorded the next highest rate of mention (10%).

There were no significant findings to be noted in the responses across the population subgroups.

Q. And of the issues or challenges you have mentioned, what are you most concerned about?

What a Benefactor Could Deliver to Most Benefit the Community

Chart 3 – What a Benefactor Could Deliver to Most Benefit the Community (Percentage of all respondents)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" which was an exclusive answer.

"Community services", including health and hospital services, were regarded as delivering the most community benefit were a benefactor to provide money for the local area, cited by 19% of respondents.

The remaining most frequent responses were distributed in a relatively even range of between 10% and 13%.

There were no significant findings to be noted in the responses across the population subgroups.

"Other" responses each mentioned by 2% or less included:

- *"Cleaner environment", "aged care/ facilities for the elderly", "tourism", "NBN/ telecommunications/ utilities infrastructure", and "policing/ Neighbourhood Watch".*

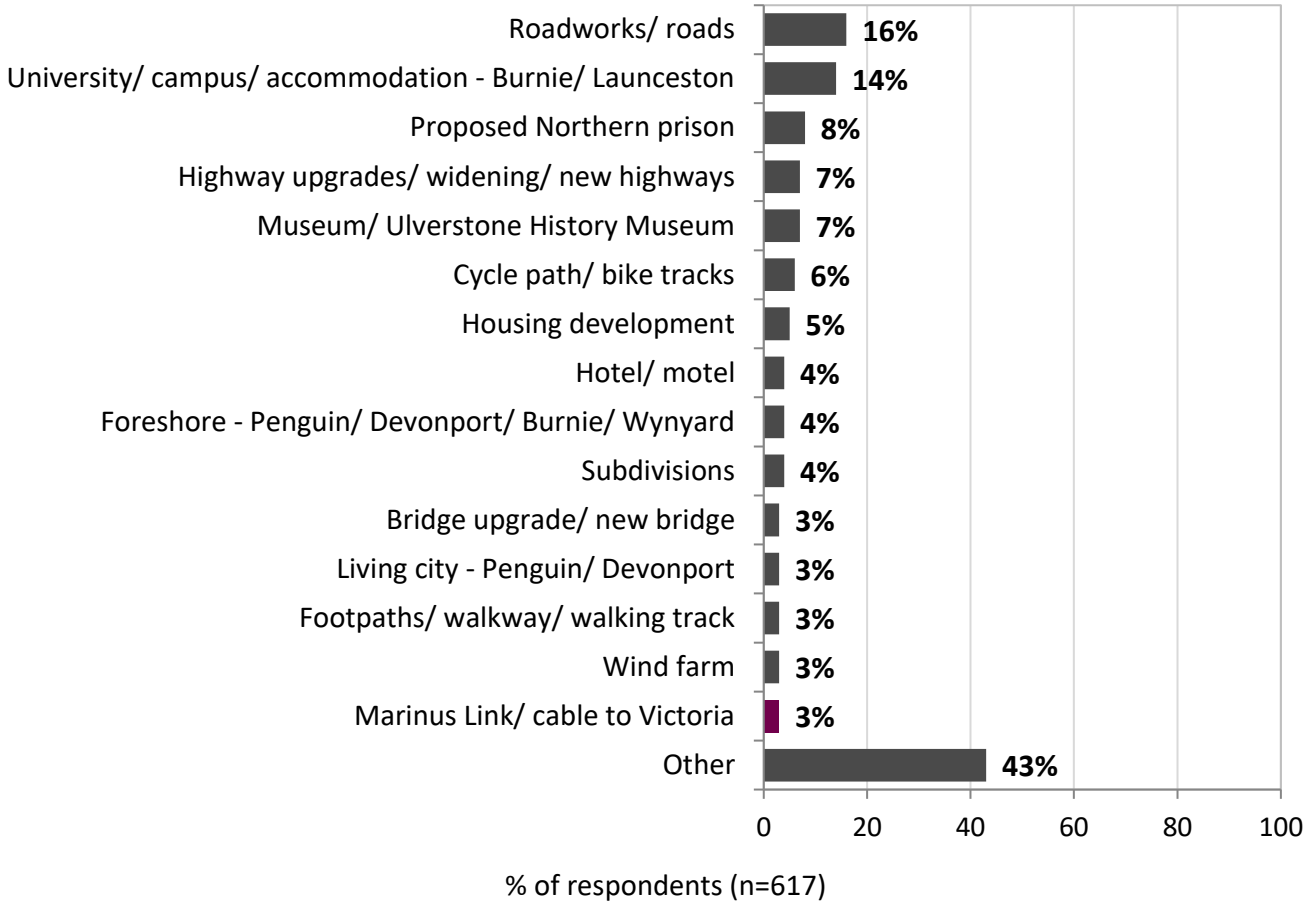
Q. Imagining if a benefactor wanted to provide money for your local area, what do you think would deliver the most community benefit?

Section Four

Awareness of Project Marinus

Unprompted Awareness of Significant Infrastructure Projects in the Area

Chart 4 – Unprompted Awareness of Significant Infrastructure Projects in the Area (Percentage of respondents aware of a project, and specifying details of the project)*



*Percentages do not sum to 100 due to multiple responses being possible.

The majority of respondents confirmed they were "aware" of a significant infrastructure project being undertaken or proposed in their area (64%), while the remainder were "unaware" (33%) or "unsure" (3%).

Without prompting, respondents were most likely to mention "roadworks/ roads" in general (16%), and "university/ campus/ accommodation – Burnie/ Launceston" (14%) as projects in the area of which they were aware.

The "Marinus Link/ cable to Victoria" was recalled by a small proportion of 3%.

There were no significant demographic findings to be noted, including in regard to the unprompted awareness levels of the Marinus Link project.

"Other" responses each mentioned by 2% of respondents were:

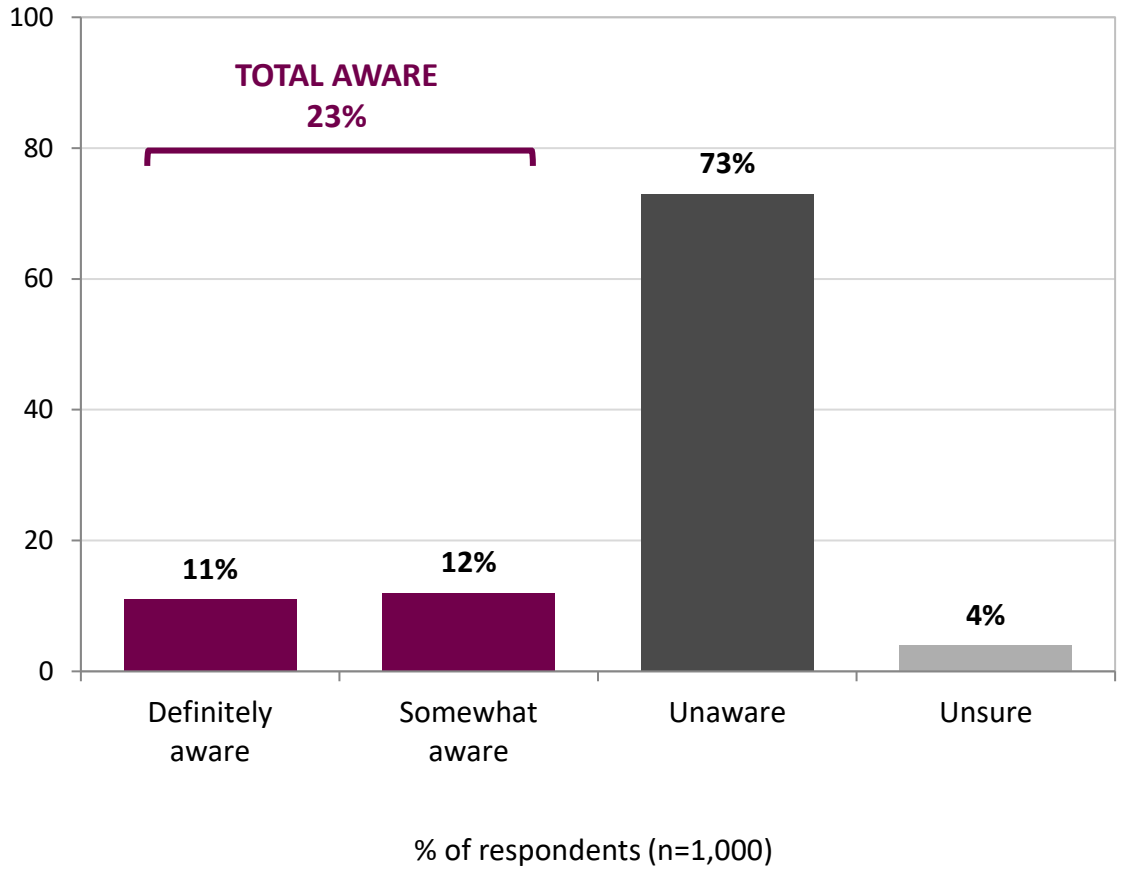
- *"A school", "Midlands Highway", "port/ wharf upgrade", "sports complex/ sports centre", "highway bypass – Perth", "waterfront development" and "police station".*

Q. Turning now to the broader area you live in, can you name any significant infrastructure projects that are being undertaken or proposed?

Q. What projects can you name?

Prompted Awareness of Project Marinus Once Named

Chart 5 – Prompted Awareness of Project Marinus Once Named (Percentage of all respondents)



% of respondents (n=1,000)

Once prompted with the name 'Project Marinus', total awareness stood at 23% (up from the 3% unprompted).

Among the respondents aware, the proportions were divided almost equally between respondents stating "definitely" (11%) and those stating "somewhat" (12%).

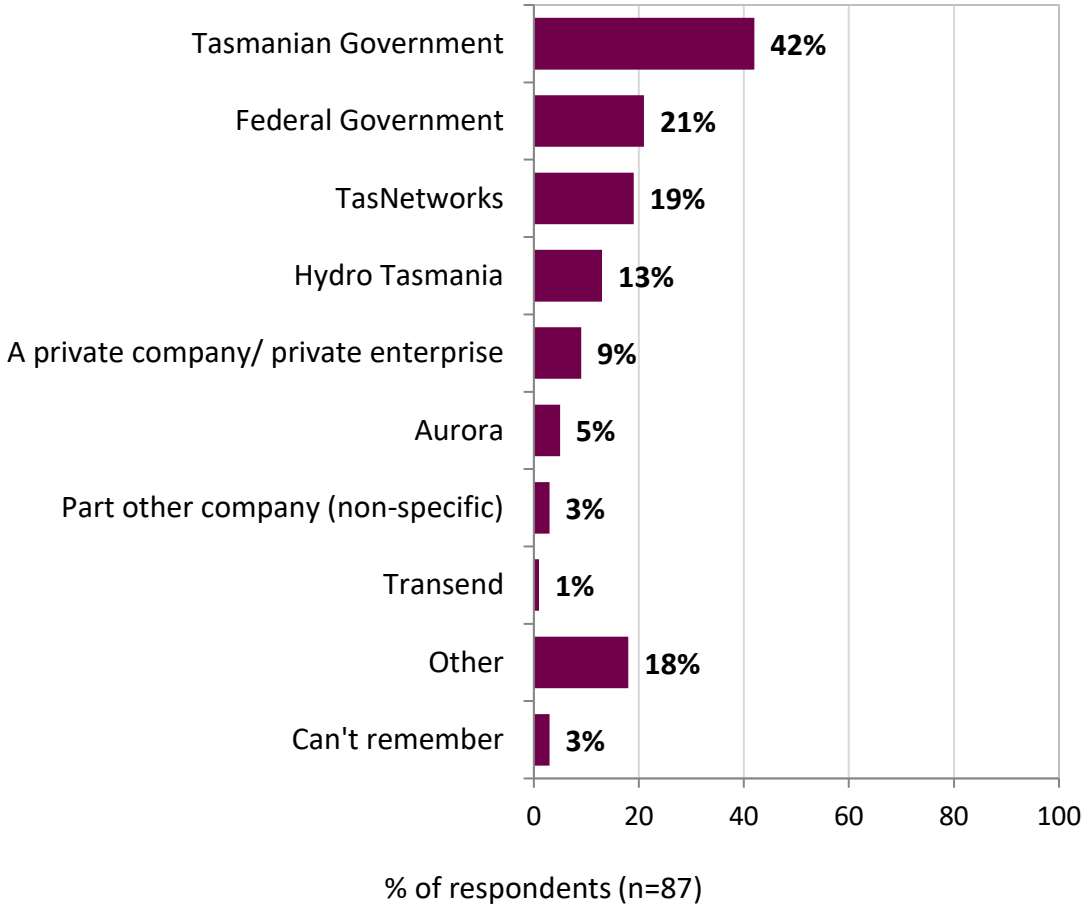
Nonetheless, the clear majority of respondents stated they were "unaware" of the project (73%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

Q. To what extent are you aware of Project Marinus?

Unprompted Awareness of Who is Responsible for Project Marinus

Chart 6 – Unprompted Awareness of Who is Responsible for Project Marinus (Percentage of respondents aware of who is responsible for the project)*



*Percentages do not sum to 100 due to multiple responses being possible.

Among the sample of respondents confirming they were aware of Project Marinus (n=243)**, around one in three stated they were also aware of who was responsible for the project (34%).**

The majority said they were "unaware" (55%) or "unsure" (11%).

Without prompting, the respondents were most likely by far to name the "Tasmanian Government" as the party responsible for the Marinus Project (42%).

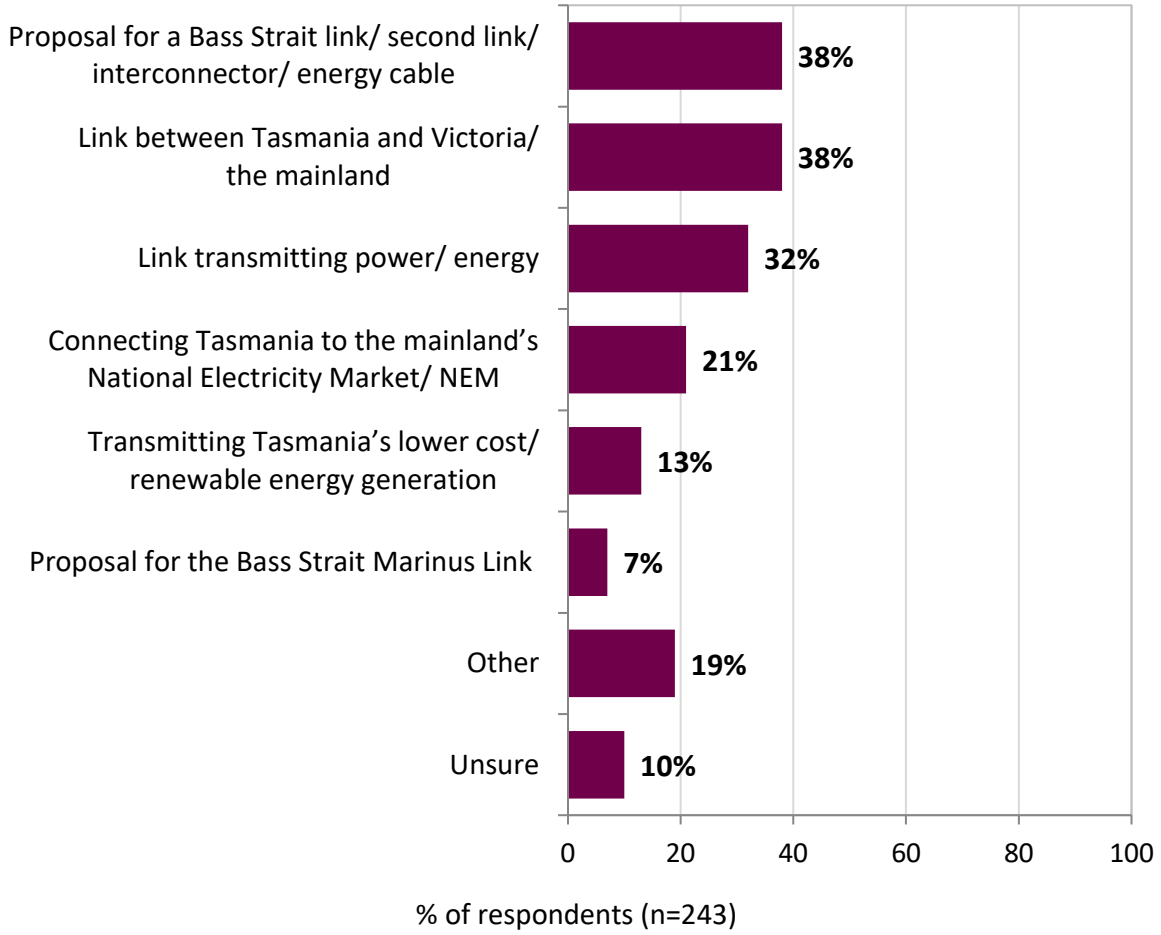
The next highest rate of mention was recorded for the "Federal Government" (21%), closely followed by "TasNetworks" (19%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

Q. Are you aware of who is responsible for the Marinus Project?
Q. Who is responsible for the project?

Unprompted Awareness of What Project Marinus Involves

Chart 7 – Unprompted Awareness of What Project Marinus Involves (Percentage of respondents aware of the Marinus Project)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" which was an exclusive answer.

The majority of respondents aware of Project Marinus correctly identified at least one aspect of what the project involves without any further prompting.

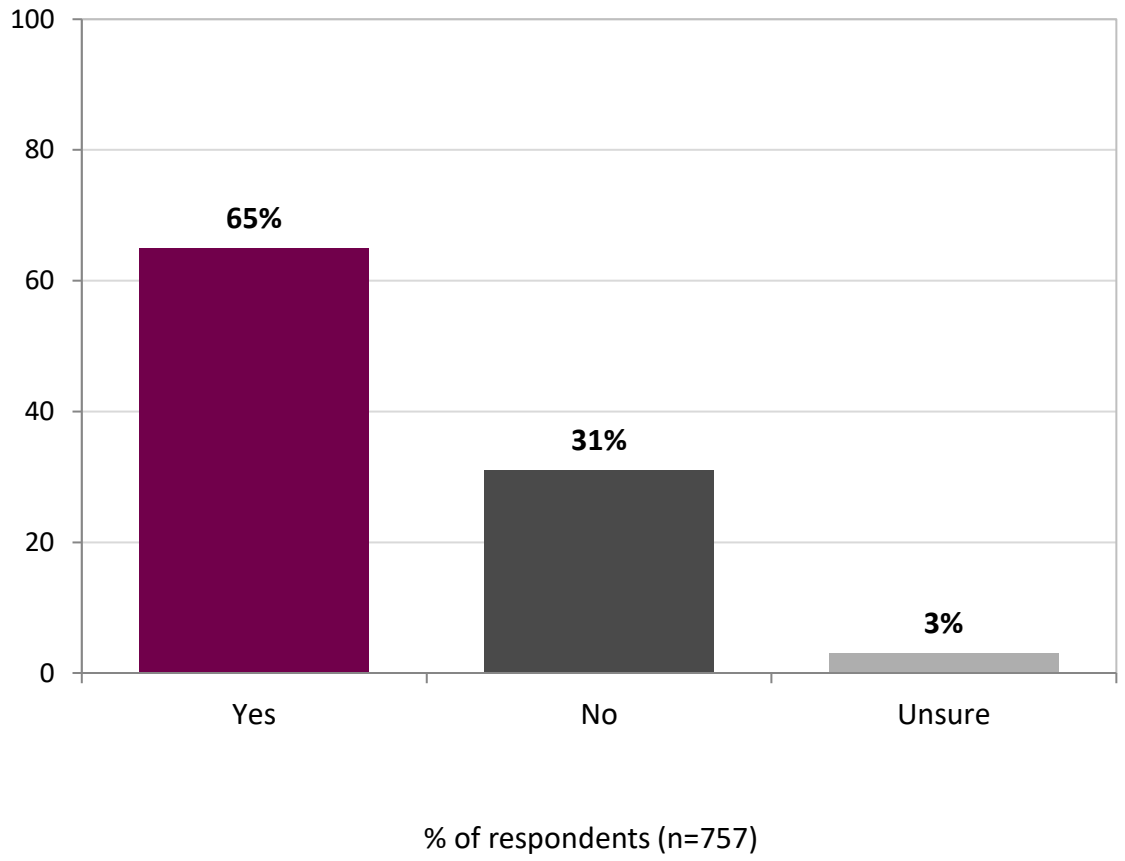
Most frequently cited were the "proposal for a Bass Strait link/ second link/ interconnector/ energy cable" and a "link between Tasmania and Victoria/ the mainland" (38% in each case), followed by a "link transmitting power/ energy" (32%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

Q. From your understanding of Project Marinus, what does it involve?

Prompted Awareness of Project Marinus Once Described

Chart 8 – Prompted Awareness of Project Marinus Once Described (Percentage of respondents not previously aware of Project Marinus)*



% of respondents (n=757)

*Percentages do not sum to 100 due to rounding.

On being read a description of what Project Marinus involves, the majority of respondents previously unable to confirm their awareness of the project now reported that "yes" they were of it (65%).

A not insignificant proportion remained unaware or "unsure" (35% in total).

By demographic group, the following indicative findings emerged:

- Respondents aged 55 years and over were significantly more likely to confirm they were **aware** of Project Marinus once prompted with a description (81%), compared to those aged 18 to 34 years (45%).

Combining unprompted and prompted awareness yielded a high total of 73% of respondents confirming they were aware of Project Marinus.

To briefly explain, Project Marinus is a proposal for a second Bass Strait interconnector, the Marinus Link, an underwater energy cable between Tasmania and Victoria, with some supporting North West Tasmania transmission developments, connecting power generated in Tasmania with the mainland's National Electricity Market.

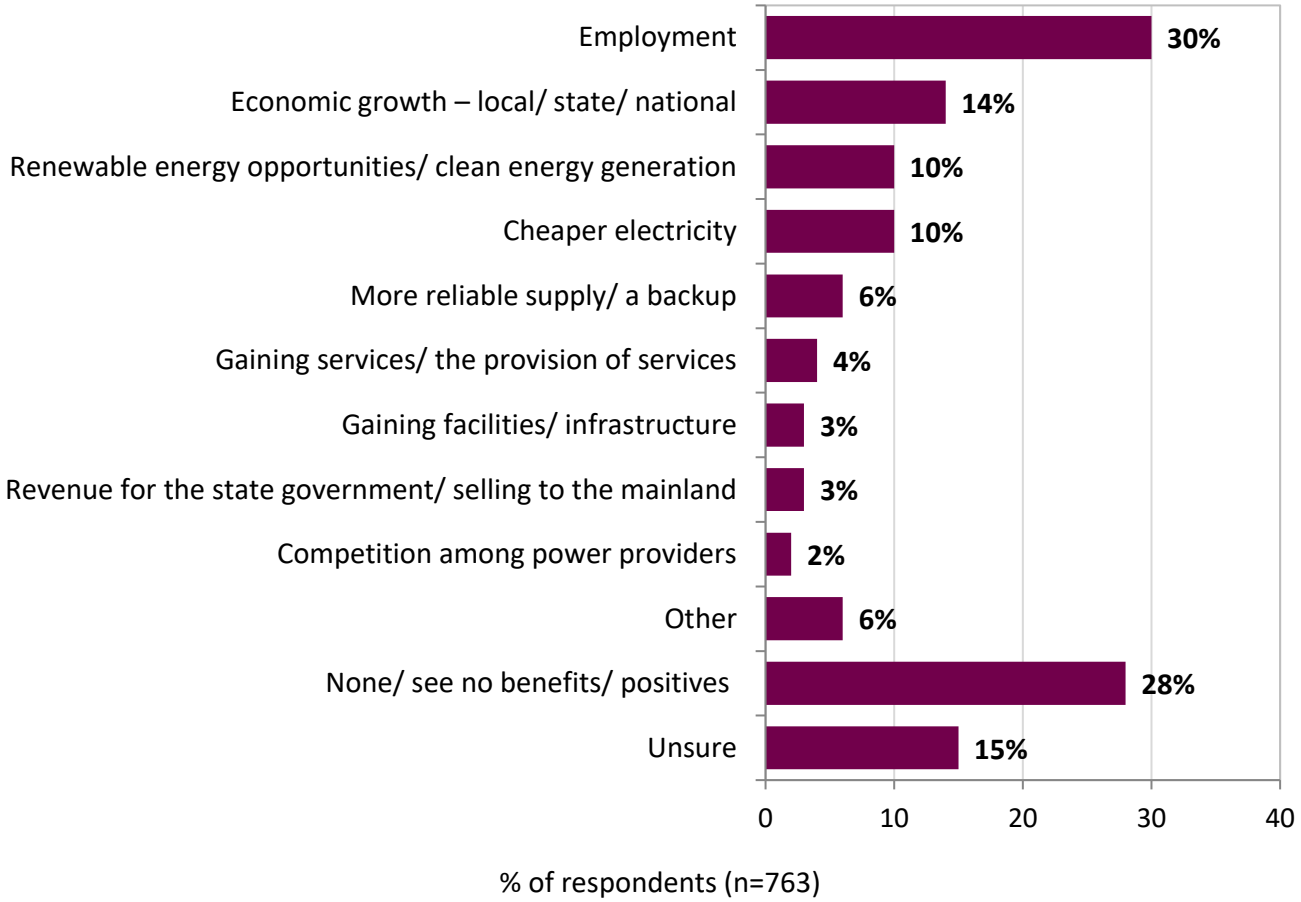
Q. From this description, can you recall having heard of this project?

Section Five

Perceptions of Project Marinus

Perceived Benefits or Positive Impacts of Project Marinus for the Community

Chart 9 – Perceived Benefits or Positive Impacts of Project Marinus for the Community (Percentage of respondents aware of Project Marinus)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" or "none" which were exclusive answers.

The respondents aware of Project Marinus were most likely by far to identify "employment" as the benefit it would bring to their community (30%).

"Economic growth – local/ state/ national" recorded the next highest rate of mention (14%).

Whilst in a minority, a not insignificant proportion stated their view that there were "none/ see no benefits/ positives" (28%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

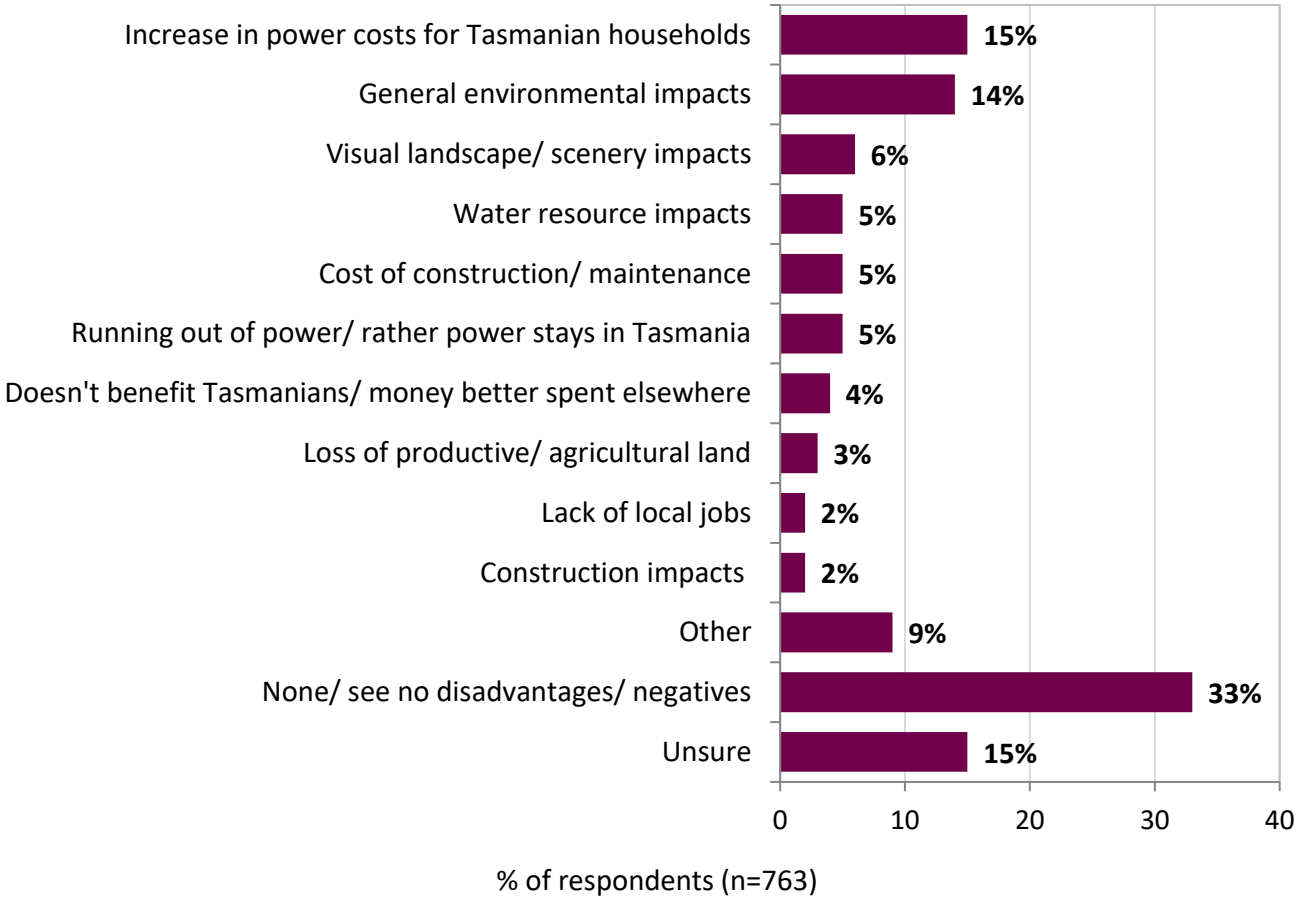
"Other" responses each mentioned by 1% were:

- *"Training and education opportunities", and "improved NBN connection".*

Q. Thinking about the Marinus Link and the North West Tasmania transmission developments, what, if anything, do you think would be its benefits or positive impacts for your community?

Perceived Disadvantages or Negative Impacts of Project Marinus for the Community

Chart 10 – Perceived Disadvantages or Negative Impacts of Project Marinus for the Community (Percentage of respondents aware of Project Marinus)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" or "none" which were exclusive answers.

Positively, a significant proportion of respondents aware of Project Marinus stated their view that there were "none/ see no disadvantages/ negatives" (33%).

Those perceiving potential disadvantages or negative impacts for their community were most likely to mention an "increase in power costs for Tasmanian households" (15%), and "general environmental impacts" (14%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

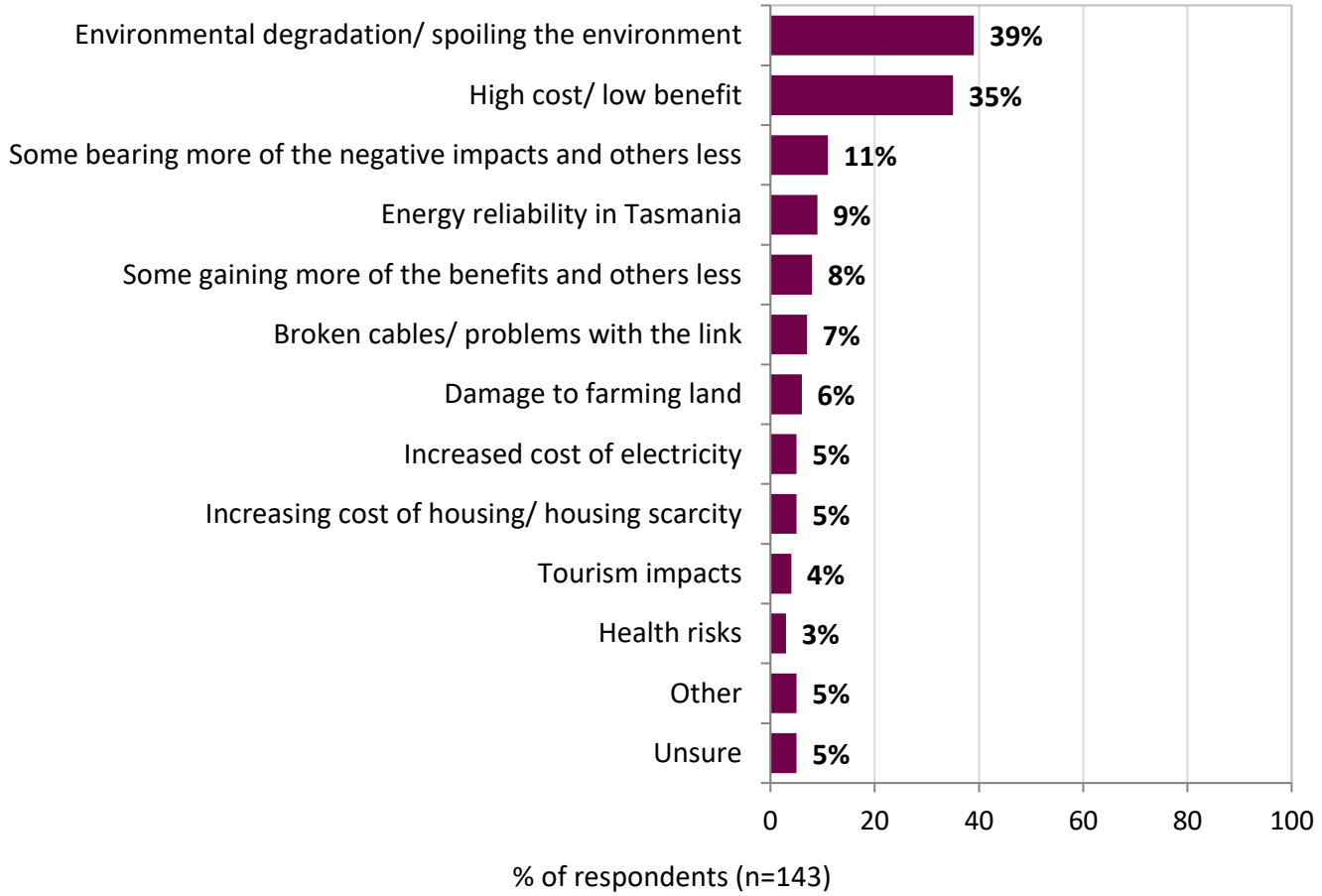
"Other" responses each mentioned by 1% of respondents were:

- *"Impacts on community cohesion", "reduction in housing affordability/ availability", "dirty/ coal energy from Victoria", "road traffic and safety impacts", and "damage to the local tourism industry".*

Q. And what, if anything, do you think would be the disadvantages or negative impacts for your community?

Perceived Potential Risks of Project Marinus for the Community

Chart 11 – Perceived Potential Risks of Project Marinus for the Community
(Percentage of respondents thinking Project Marinus could pose risks for the community)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" which was an exclusive answer.

Among the respondents aware of Project Marinus, 21% stated "yes" they thought it would pose some potential risk for the community.

However, the majority did <u>not</u> think there were any such potential risks (66%), and the remainder were "unsure" (14%).

The potential risks that were identified significantly more frequently were "environmental degradation/ spoiling the environment" (39%), and "high cost/ low benefit" (35%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

Q. Do you think Project Marinus would pose any potential risks for the community?

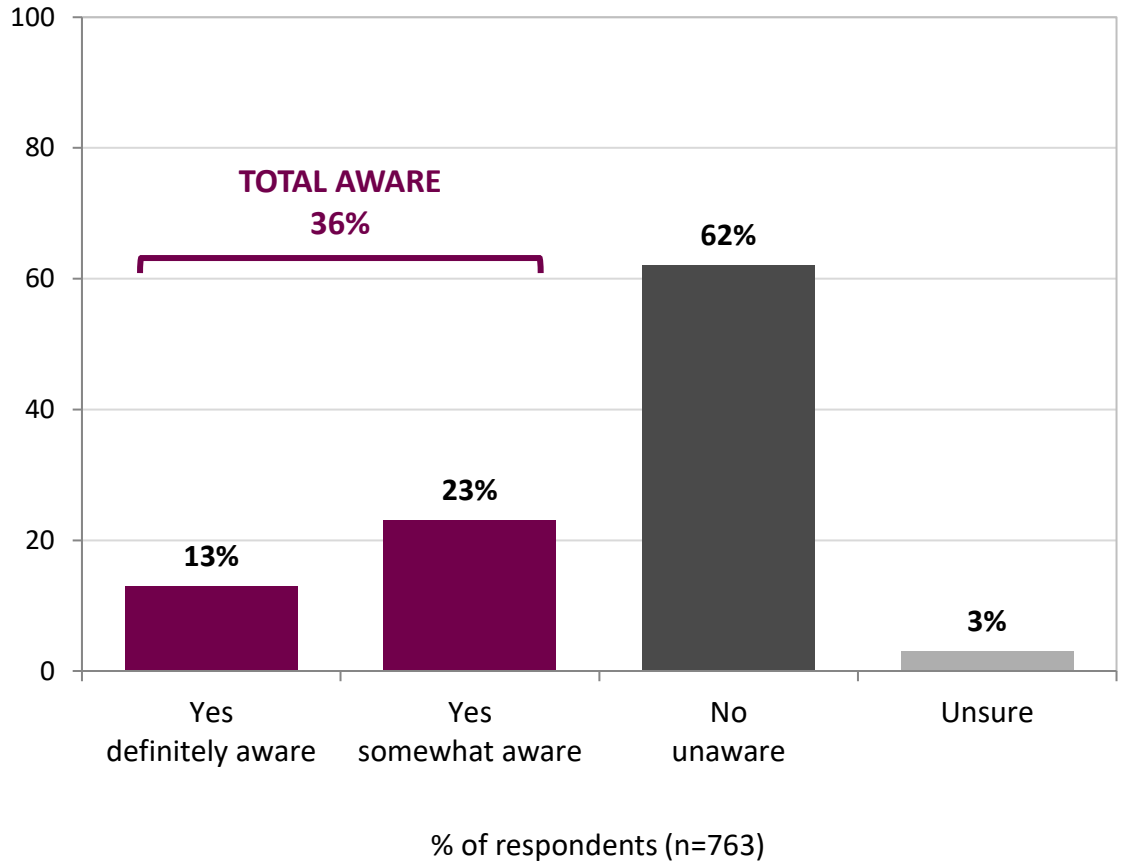
Q. What do you think would be the potential risks of Project Marinus?

Section Six

Perceptions of the Staverton to Hampshire Hills Transmission Line

Awareness of the Staverton to Hampshire Hills Transmission Line

Chart 12 – Awareness of the Staverton to Hampshire Hills Transmission Line (Percentage of respondents aware of Project Marinus)*



*Percentages do not sum to 100 due to rounding.

The respondents aware of Project Marinus were significantly more likely to report that they were "unaware" of the Staverton to Hampshire Hills transmission line (62%).

Of the 36% in total confirming they were aware of it to some degree, the smaller proportion stated they were "definitely aware" (13%).

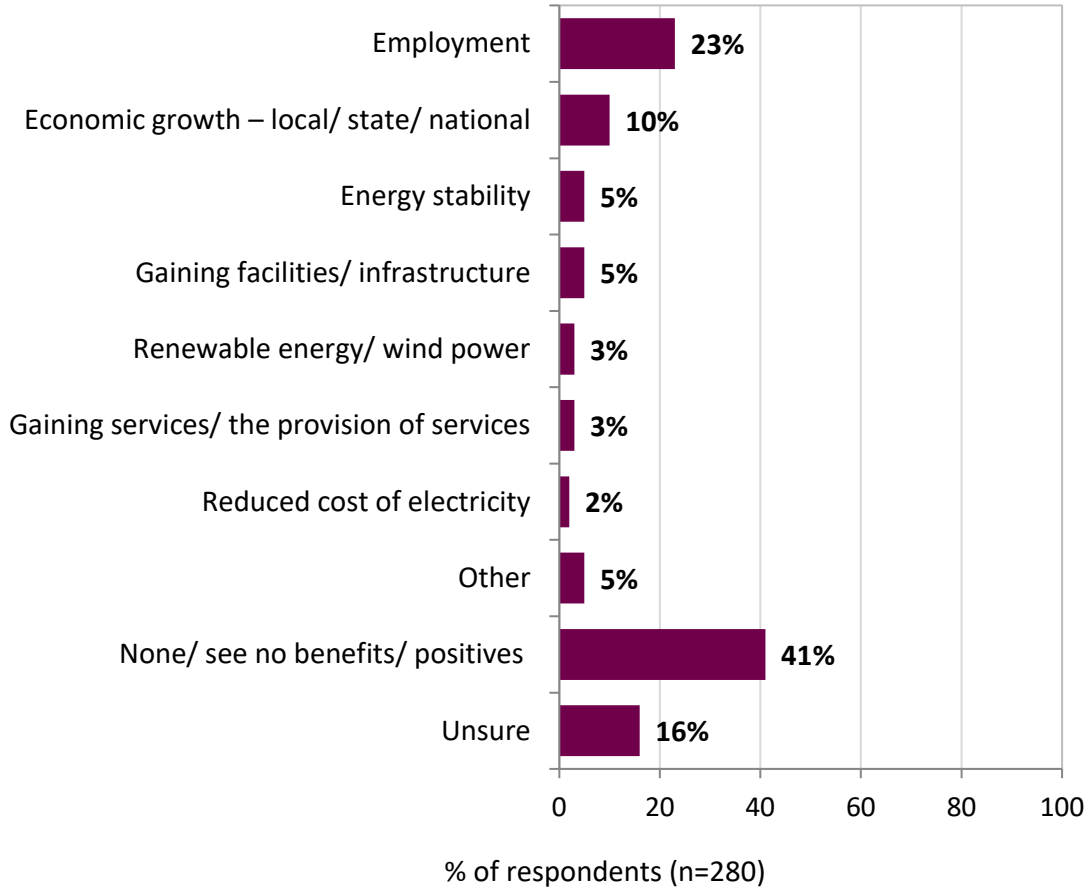
There were no significant findings to be noted on comparing the responses across the population subgroups.

Project Marinus also includes some transmission line developments in North West Tasmania. There will be a staged approach to the planning for these, and a part of the route of the transmission line has already been released.

Q. Are you aware of the proposed Staverton to Hampshire Hills transmission line and its preferred route?

Perceived Benefits or Positive Impacts of the Transmission Line for the Community

Chart 13 – Perceived Benefits or Positive Impacts of the Transmission Line for the Community (Percentage of respondents aware of the proposed transmission line and preferred route)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" or "none", which were exclusive answers.

The respondents aware of the Staverton to Hampshire Hills transmission line were most likely by far to identify "employment" as the benefit it would bring to their community (23%).

"Economic growth – local/ state/ national" recorded the next highest rate of mention (10%).

These two responses reflected those that had also been given most often with respect to Project Marinus.

A significantly large proportion stated their view that there were "none/ see no benefits/ positives" (41%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

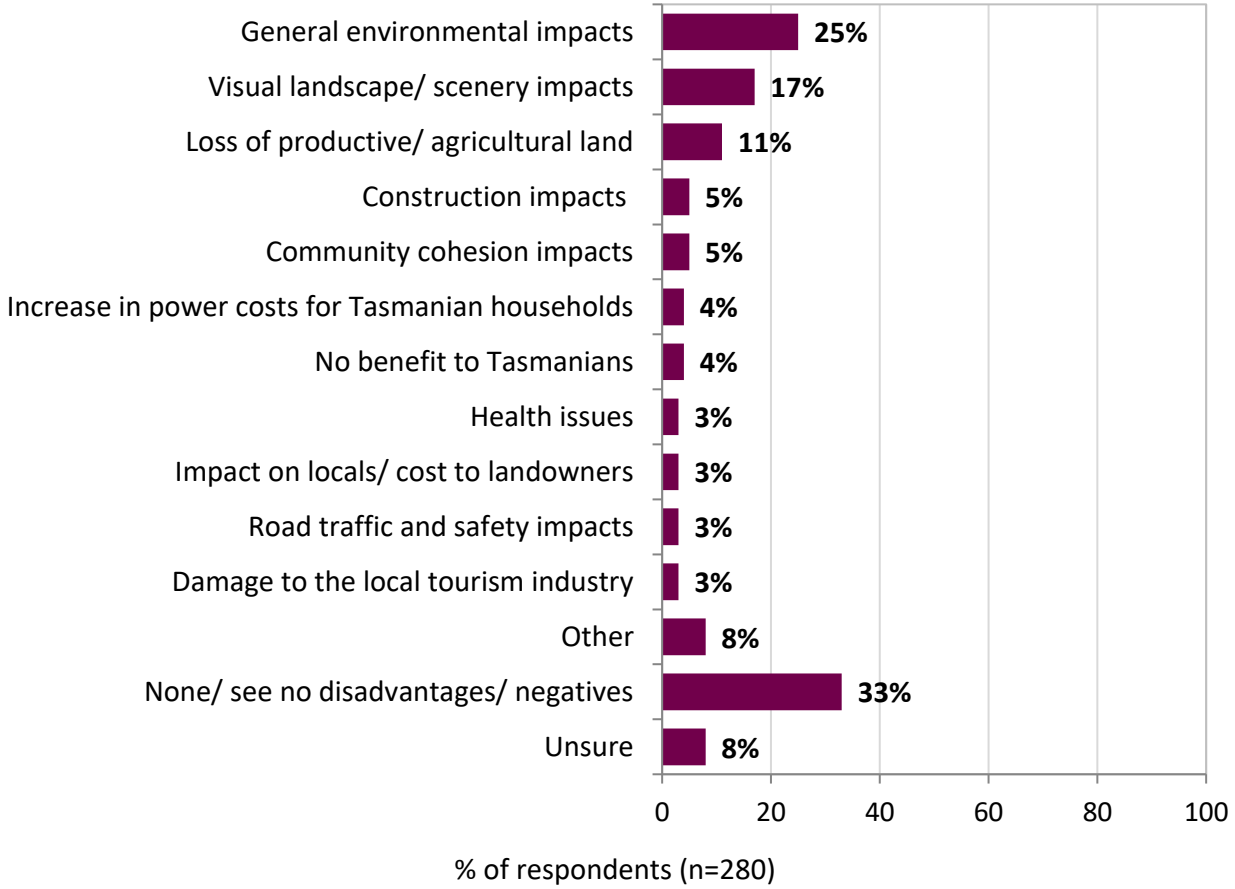
"Other" responses each mentioned by 1% were:

- *"Training and education opportunities", "maintenance of the environment", and "maintenance of the scenery/ landscape".*

Q. Thinking about the Staverton to Hampshire Hills transmission line, what, if anything, do you think would be its benefits or positive impacts for your community?

Perceived Disadvantages or Negative Impacts of the Transmission Line for the Community

Chart 14 – Perceived Disadvantages or Negative Impacts of the Transmission Line for the Community (Percentage of respondents aware of the proposed transmission line and preferred route)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure" or "none", which were exclusive answers.

Again, as was the case with respect to the Marinus Project, a significant proportion of respondents aware of the Staverton to Hampshire Hills transmission Line stated their positive view that there were "none/ see no disadvantages/ negatives" (33%).

Those perceiving potential disadvantages or negative impacts for their community were most likely to mention "general environmental impacts" (25%), followed by "visual landscape/ scenery impacts" (17%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

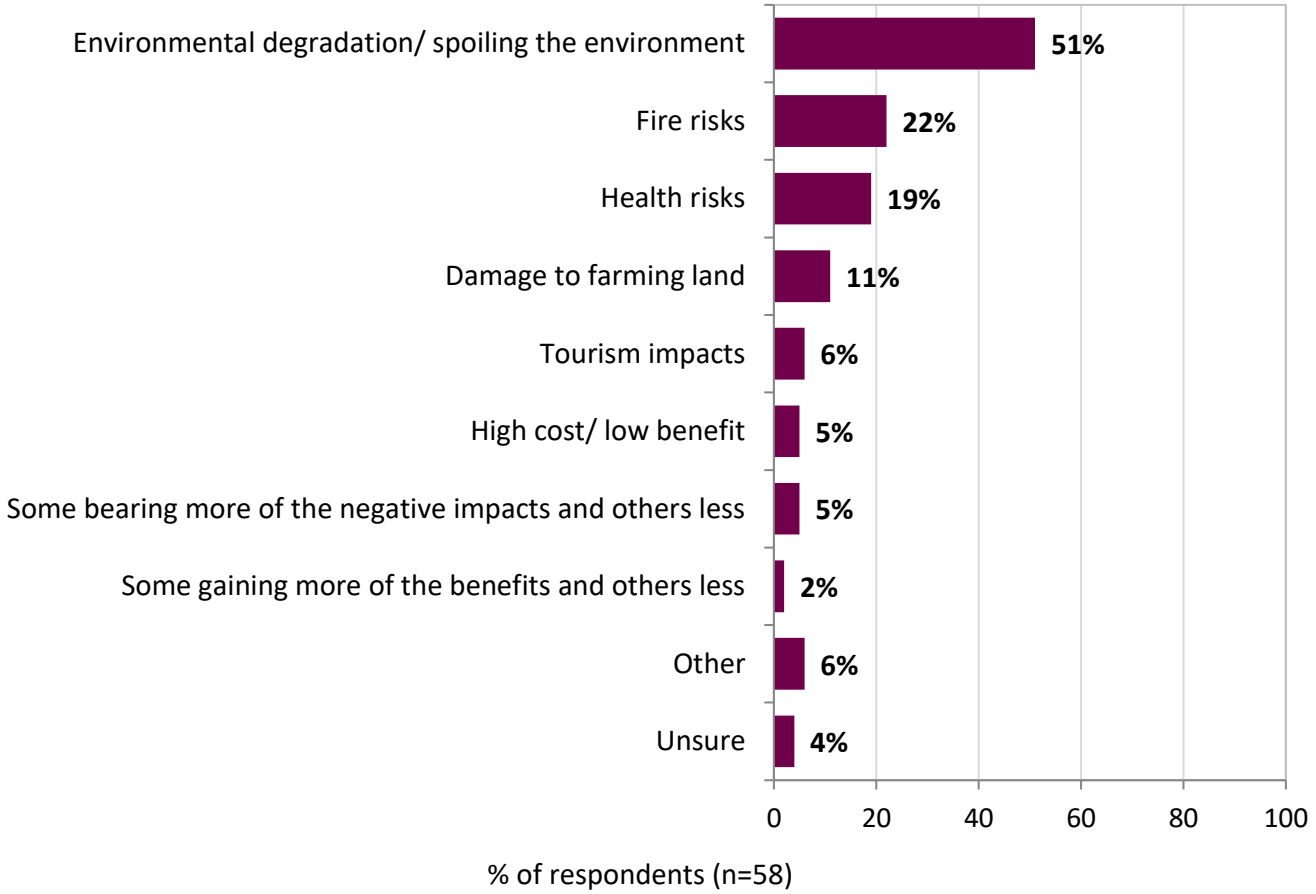
"Other" responses each mentioned by 2% or less included:

- *"Water resource impacts", "depends on the placement/ details", "reduction in housing affordability/ availability" and "bushfire impacts".*

Q. And what, if anything, do you think would be the disadvantages or negative impacts for your community?

Perceived Potential Risks of the Transmission Line for the Community

Chart 15 – Perceived Potential Risks of the Transmission Line for the Community (Percentage of respondents thinking the transmission line could pose risks for the community)*



*Percentages do not sum to 100 due to multiple responses being possible, except for "unsure", which was an exclusive answer.

Among the respondents aware of the Staverton to Hampshire Hills transmission line, 22% stated "yes" they thought it would pose some potential risk for the community.

However, the majority did not think there were any potential risks (69%), and the remainder were "unsure" (9%).

The potential risk that was identified most frequently by far was "environmental degradation/ spoiling the environment" (51%).

Next most commonly cited were "fire risks" (22%), and "health risks" (19%).

There were no significant findings to be noted on comparing the responses across the population subgroups.

Q. Do you think the Staverton to Hampshire Hills transmission line would pose any potential risks for the community?

Q. What do you think would be the potential risks of the Staverton to Hampshire Hills transmission line?

Ranking of the Importance of Potential Impacts of the Transmission Line on the Local Area

Table 9 – Ranking of the Importance of Potential Impacts of the Transmission Line on the Local Area (Percentage of respondents aware of the proposed transmission line and preferred route)*

Potential Impact	RANKING OF IMPORTANCE OF POTENTIAL IMPACTS					
	1 Most important	2	3	4	5 Least important	AVERAGE†
Protection of the natural environment	42	16	18	11	12	2.4
Creation of employment and business opportunities	26	18	21	14	20	2.8
Maintaining community safety	16	23	18	26	17	3.0
Protection of the area's visual landscape	9	29	20	24	18	3.1
Protection of the tourism industry	7	13	22	25	33	3.6

On being prompted with a list of potential impacts of the Staverton to Hampshire Hills transmission line, the respondents were most likely by far to rank "protection of the natural environment" as the "most important" for their local area, 42% giving this the top score of '1'. This element was also ranked top in terms of its average importance score (2.4). "Creation of employment and business opportunities" was ranked next highest (with an average importance score of 2.8).

"Protection of the tourism industry" was the most likely of the elements to record the "least important" score of '5' (by 33%).

*Respondents who were unable to rate the element have not been included in this table.
†The lower the average score, the more important the potential impact was considered.

Q. Thinking further about potential impacts of the Staverton to Hampshire Hills transmission line, how would you rank the following, on a scale from 1 to 5, where 1 is "most important" and 5 is "least important" for your local area?