URBIS

CENTRAL HOBART PRECINCT STRUCTURE PLAN

MOVEMENT ANALYSIS



Prepared for City of Hobart
21st October 2022

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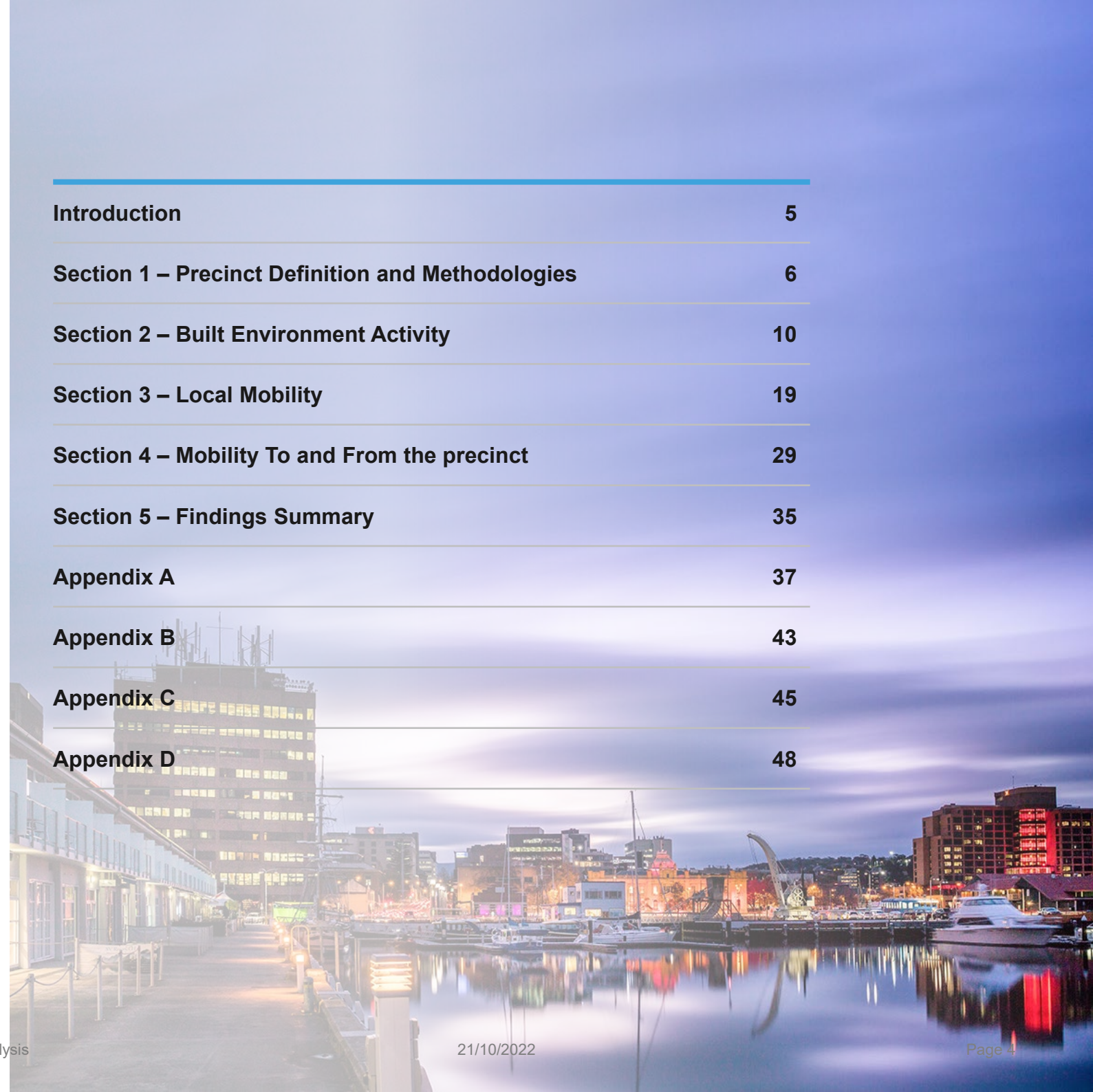
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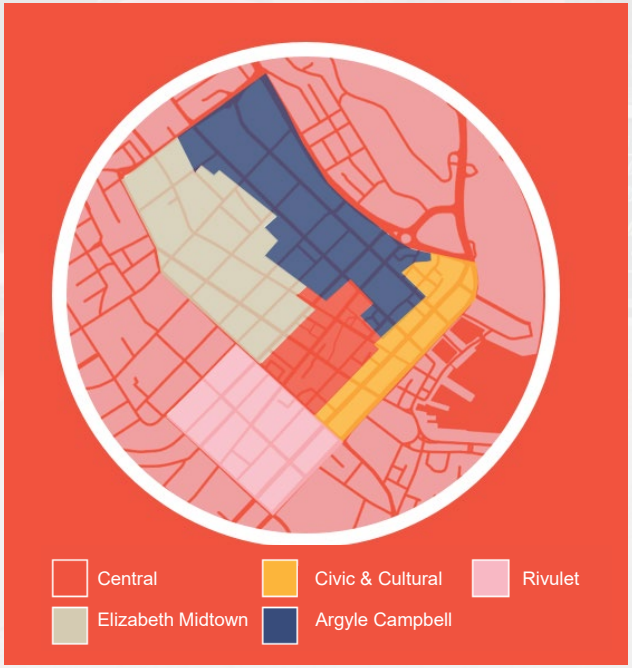
CONTENTS

Introduction	5
Section 1 – Precinct Definition and Methodologies	6
Section 2 – Built Environment Activity	10
Section 3 – Local Mobility	19
Section 4 – Mobility To and From the precinct	29
Section 5 – Findings Summary	35
Appendix A	37
Appendix B	43
Appendix C	45
Appendix D	48



INTRODUCTION

This Movement Analysis Study has been prepared to inform the Central Hobart Precincts Structure Plan (CHPSP). The area comprising the focus of the CHPSP, covers 64 blocks bounded by Davey Street, Burnett Street, Brooker Highway, Molle Street and Harrington Street – referred to as the 'boot'.



To develop an effective CHPSP it is necessary to understand how people move around Central Hobart. In reviewing movement, we have looked at Human Movement Data which utilises mobile phone data, to understand activity patterns by different user groups during different periods of time, alongside a range of transport data provided by the City of Hobart.

In undertaking this study of movement, Urbis alongside the City of Hobart and the other consultant groups assisting on this project, have defined two key study areas including

1. Civic and Cultural Precinct.
2. The Central Hobart Precincts.

(including the Civic and Cultural Precinct).

Given the people movement interconnectivity considerations, an additional study has been undertaken for North Hobart to support a separate future Precinct Structure Plan for that area.

The focus of this study is the Central Hobart Precincts. The Central Hobart Precinct is slightly larger than that defined by the CHPSP given the need to accommodate movement considerations beyond these boundaries. Specifically, the impact of movement in the area of the Civic and Cultural Precinct on the Sullivans Cove side of Davey Street.

01

PRECINCT DEFINITION AND METHODOLOGIES



CENTRAL HOBART PRECINCTS

The Central Hobart Precinct Study Area encompasses the core Capital City functions of Tasmania. As a centre it holds employment, education, residents, visitors and tourist functions. Central Hobart has been broken up into five precincts of similar character, potential and identity.

In the following sections, we will look at the movement and dispersion of activity across this precinct including

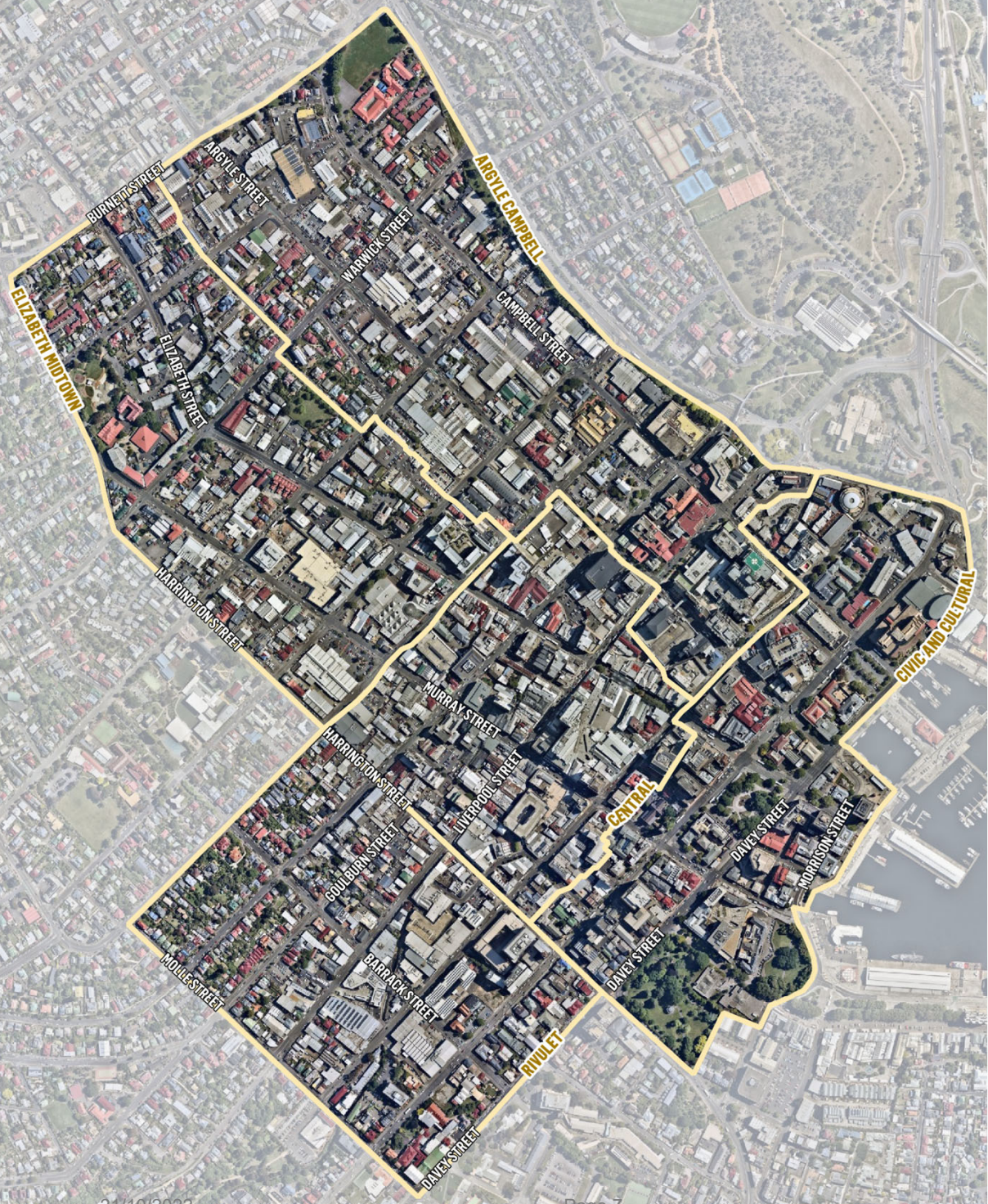
- Variations based on time of day, day of week.
- Visitation by visitor category (i.e., locals, interstate and international tourists).
- Hierarchy of activity in key public spaces and on roads.
- Car park usage and dispersion.
- Transit activity.

Once patterns of visitation were identified, HMD was used with transport data to determine the local mobility pattern of the Central Hobart Precinct and the mobility patterns coming to and from the precinct. The data includes

- SCATS traffic Data.
- Bus Boarding Data.
- Car Park Occupancy Data.
- Hobart Travel Model.

This transport data was used to validate that the HMD sample aligned with the known data sources.

An explanation of HMD is provided over page.



DATA AND METHODOLOGY

What is Human Movement Data?

Human Movement Data (HMD) is a powerful analytical tool that uses mobile phone data to provide insights into



Where visitors come from and where they are going which is instrumental to defining catchment areas and customer profiles.



What places they visit which helps understand drivers of visitation and relationships between different types of activities (for example work, shopping, leisure, school, sport etc.)



How they move around within particular places – the routes they take, how far they walk, where they stop and how long they spend there.



When they visit throughout the year, day, night or hour.



How movement patterns have changed in response to a new development, changes in transport infrastructure, a particular promotion or event, or improvements to the public realm

Methodology

In order to understand the levels of activity and the origins of that activity across Central Hobart, HMD has been utilised.

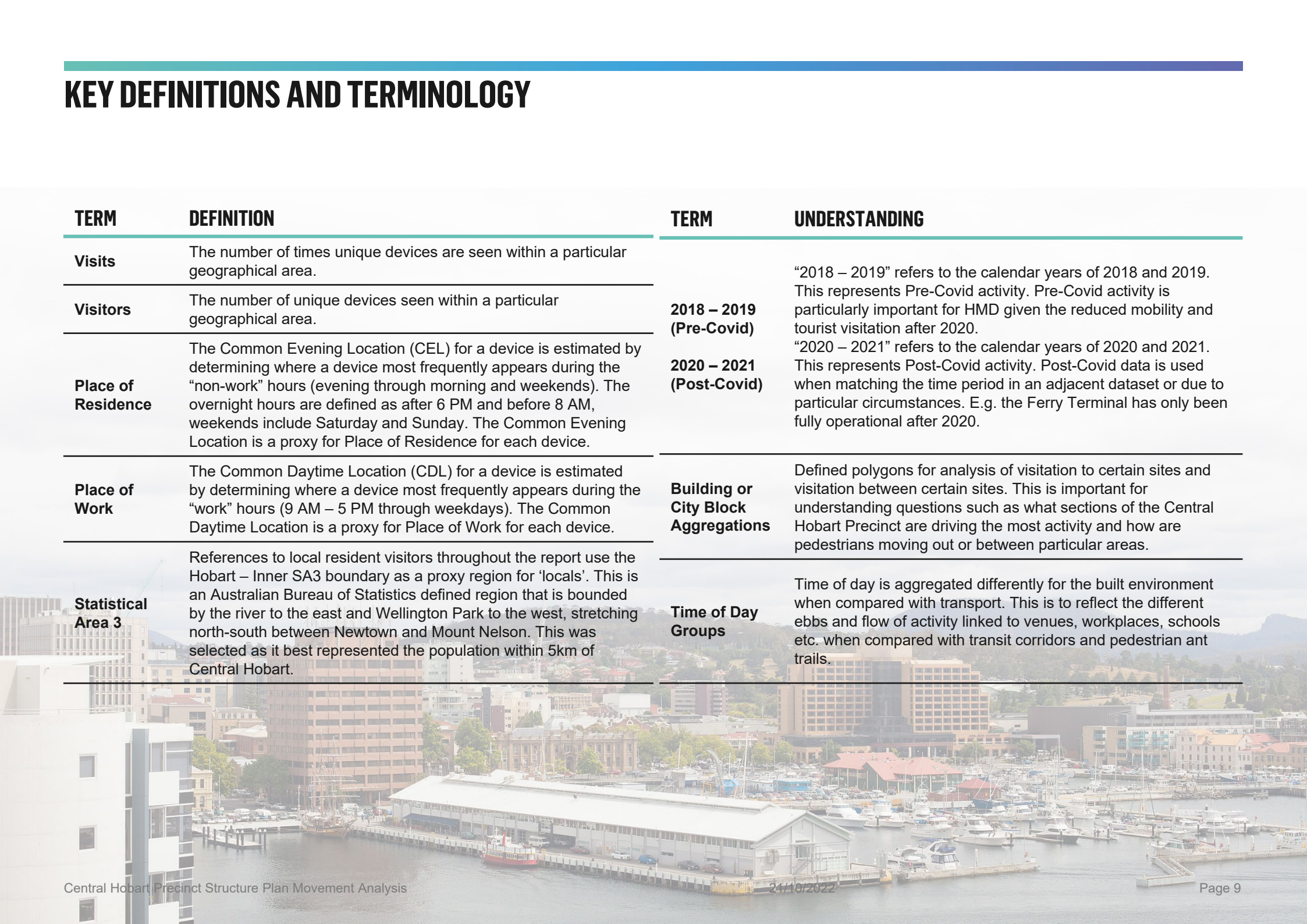
Where the data comes from?

- HMD has been sourced from the third-party provider Near. Near's location data is aggregated from a variety of high-quality sources, including first party data from Near's own apps, partnered applications and locational data derived from mobile advertising.
- Across Australia, the Near dataset has over 6.1 million unique devices that have been active in the last thirty days. These devices contribute to Near's vast database of locational 'pings'. Each one of these devices may give a locational 'ping' when using an application that contains Near's locational software, intermittently throughout the day depending on the application's agreement with Near, or when interacting with advertisement containing Near's software. Information relating to each 'ping' includes a de-identified device identifier, date, time, latitude and longitude. Near then cleans all locational data received to ensure that the data provided to clients is both accurate and actionable.
- Lastly, it is important to note that the raw number of visits counted from the HMD data is not a measure of actual activity. Rather, the visit counts are best used to understand patterns of behaviour and relative levels of activity in areas and across time periods. It is a sample and should be treated as such. For this study as much as possible people that are traveling on the roads have been excluded from the data.
- Data provided within this document primarily relates to Pre-Covid movement data, that is over the 2018-2019 period. Further detail regarding the study period are defined over page.

KEY DEFINITIONS AND TERMINOLOGY

TERM	DEFINITION
Visits	The number of times unique devices are seen within a particular geographical area.
Visitors	The number of unique devices seen within a particular geographical area.
Place of Residence	The Common Evening Location (CEL) for a device is estimated by determining where a device most frequently appears during the "non-work" hours (evening through morning and weekends). The overnight hours are defined as after 6 PM and before 8 AM, weekends include Saturday and Sunday. The Common Evening Location is a proxy for Place of Residence for each device.
Place of Work	The Common Daytime Location (CDL) for a device is estimated by determining where a device most frequently appears during the "work" hours (9 AM – 5 PM through weekdays). The Common Daytime Location is a proxy for Place of Work for each device.
Statistical Area 3	References to local resident visitors throughout the report use the Hobart – Inner SA3 boundary as a proxy region for 'locals'. This is an Australian Bureau of Statistics defined region that is bounded by the river to the east and Wellington Park to the west, stretching north-south between Newtown and Mount Nelson. This was selected as it best represented the population within 5km of Central Hobart.

TERM	UNDERSTANDING
2018 – 2019 (Pre-Covid) **2020 – 2021 (Post-Covid)**	"2018 – 2019" refers to the calendar years of 2018 and 2019. This represents Pre-Covid activity. Pre-Covid activity is particularly important for HMD given the reduced mobility and tourist visitation after 2020. "2020 – 2021" refers to the calendar years of 2020 and 2021. This represents Post-Covid activity. Post-Covid data is used when matching the time period in an adjacent dataset or due to particular circumstances. E.g. the Ferry Terminal has only been fully operational after 2020.
Building or City Block Aggregations	Defined polygons for analysis of visitation to certain sites and visitation between certain sites. This is important for understanding questions such as what sections of the Central Hobart Precinct are driving the most activity and how are pedestrians moving out or between particular areas.
Time of Day Groups	Time of day is aggregated differently for the built environment when compared with transport. This is to reflect the different ebbs and flow of activity linked to venues, workplaces, schools etc. when compared with transit corridors and pedestrian ant trails.



02

PRECINCT CONTEXT



CENTRAL HOBART KEY ACTIVITY GENERATORS

Key activity generators have been identified in Central Hobart. These include major trip attractors such as

- Cat & Fiddle Arcade.
- Royal Hobart Hospital.
- Centrepoint Shopping Centre.
- University of Tasmania (UTAS).
- Federation Concert Hall.
- Elizabeth Street North.

These areas were identified as key activity generators based on their land-use typology and contribution to the Central Hobart urban environment.



CENTRAL HOBART BUILDING CONTEXT

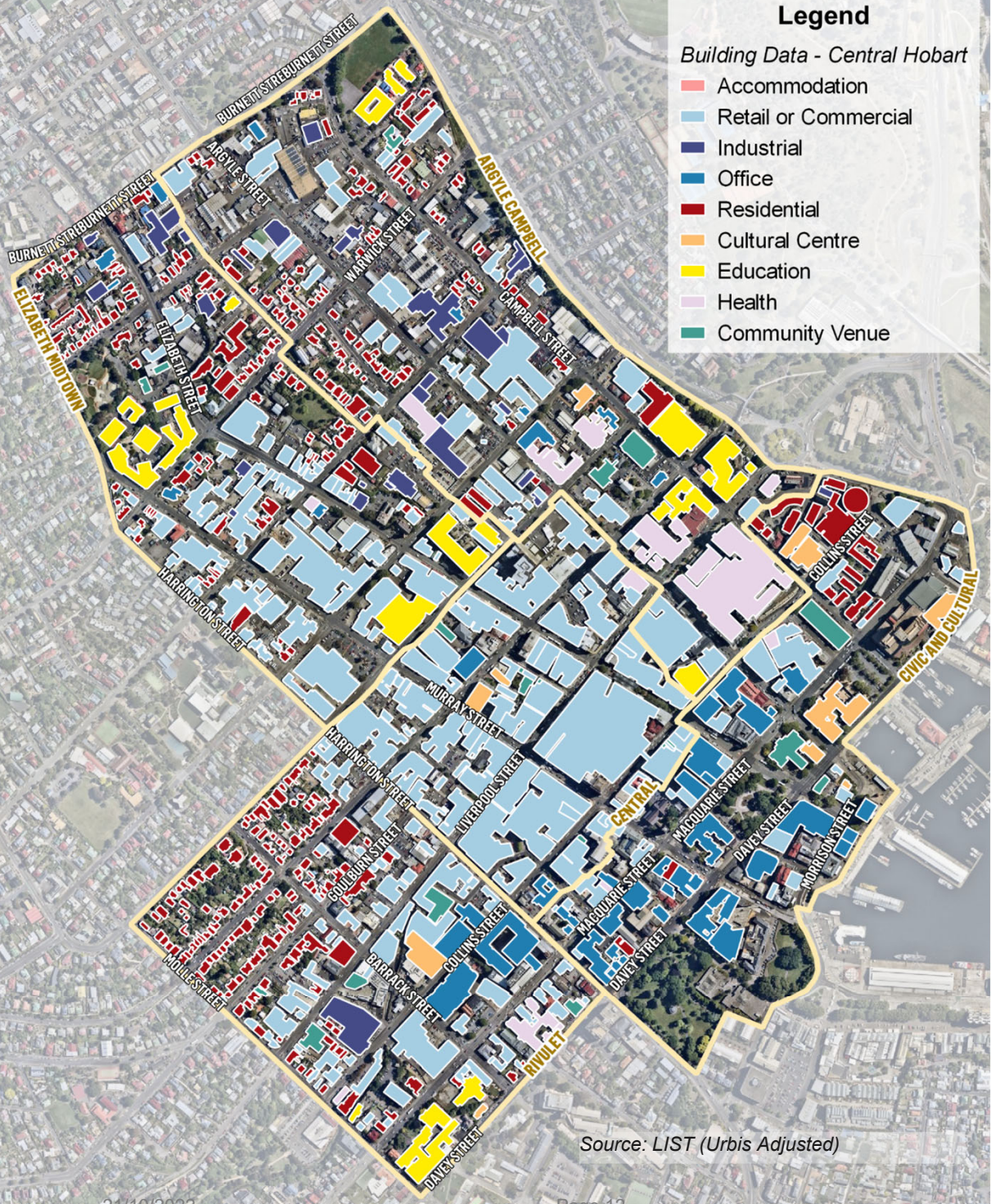
Central Hobart encompasses the Hobart CBD and the residential areas immediately surrounding the CBD.

Retail, commercial and office land uses dominate Macquarie, Davey, Argyle, Murray, and Liverpool Streets.

Hobart Hospital sits on the north-eastern edge of the precinct, surrounding it, and includes a mix of educational, cultural, and commercial uses.

Land uses start to shift from commercial uses to accommodation/community uses north of Bathurst Street, reflective of the inner Hobart suburbs.

There is a concentration of cultural and community venues around Wapping and Franklin Wharf. This area is a key tourist destination for visitors to Hobart and the land uses reflect that. These locations are key trip attractors to tourists and are near the cruise terminal at Macquarie Point.



Source: LIST (Urbis Adjusted)

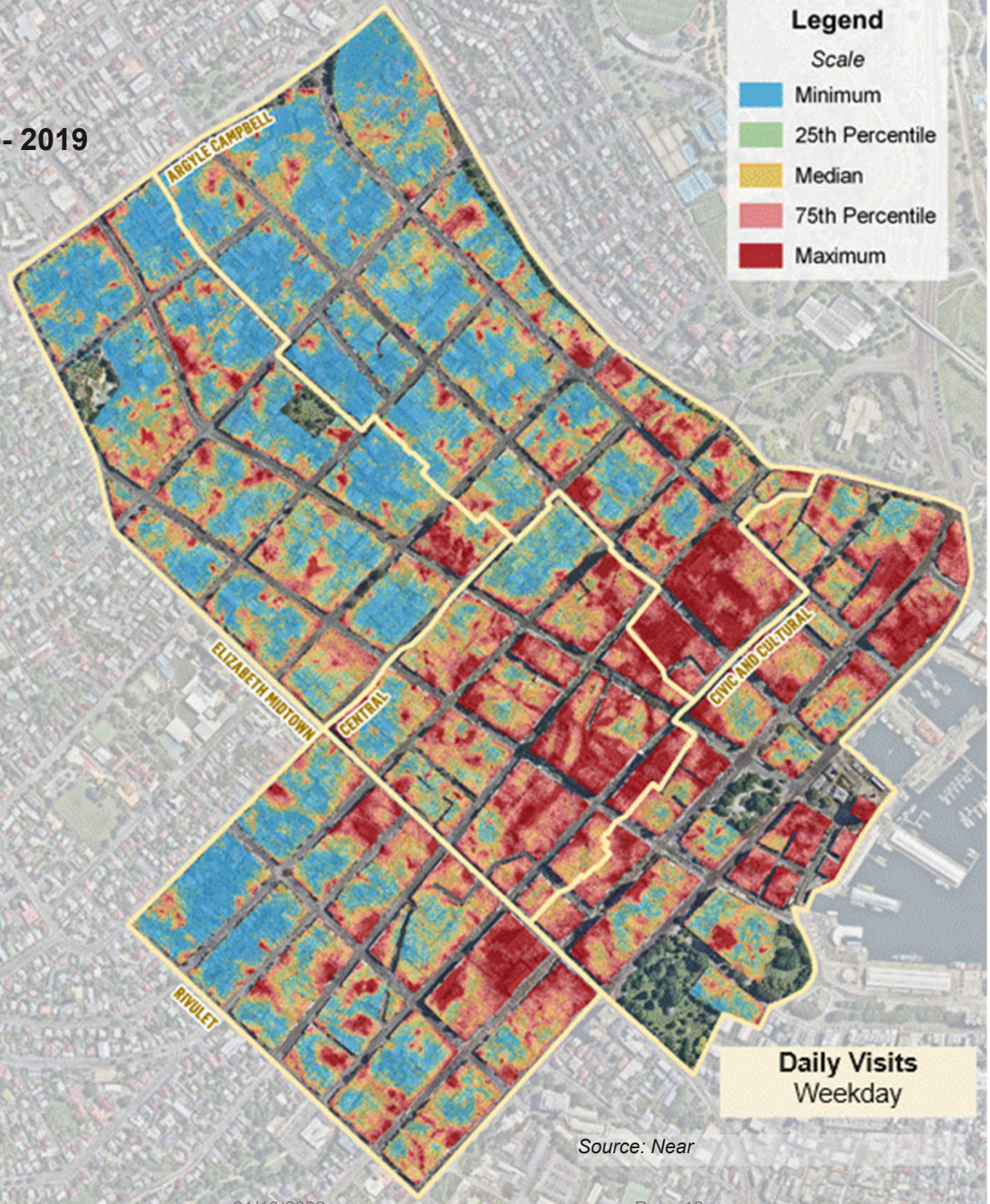
VISITATION DISTRIBUTION BY DAY TYPE

Total visits to Central Hobart built environment 2018 - 2019

The adjacent map visualises the total pre-Covid visitation into Central Hobart by weekend vs. weekday trips.

Key hotspots or cold spots of activity include

- The Royal Hobart Hospital, shows high levels of visitation across the week since it does not close down.
- Federation Concert Hall and the Hotel Grand Chancellor Hobart drive and support many of the tourists that come to Central Hobart.
- The Cat & Fiddle Arcade, a consistently busy retail centre that picks up workers during the week and shoppers on the weekend.
- The blocks around Morrison Street near Franklin Wharf are very busy during the week but drop off on the weekend. Areas outside of Central, Civic and Cultural precincts have a large drop-off in activity from weekday to weekend.
- Argyle Campbell and Elizabeth Midtown have many cold spots through the middle of the precinct where there are many commercial and light industrial uses.



Source: Near

DAY TYPE DETAILED ANALYSIS

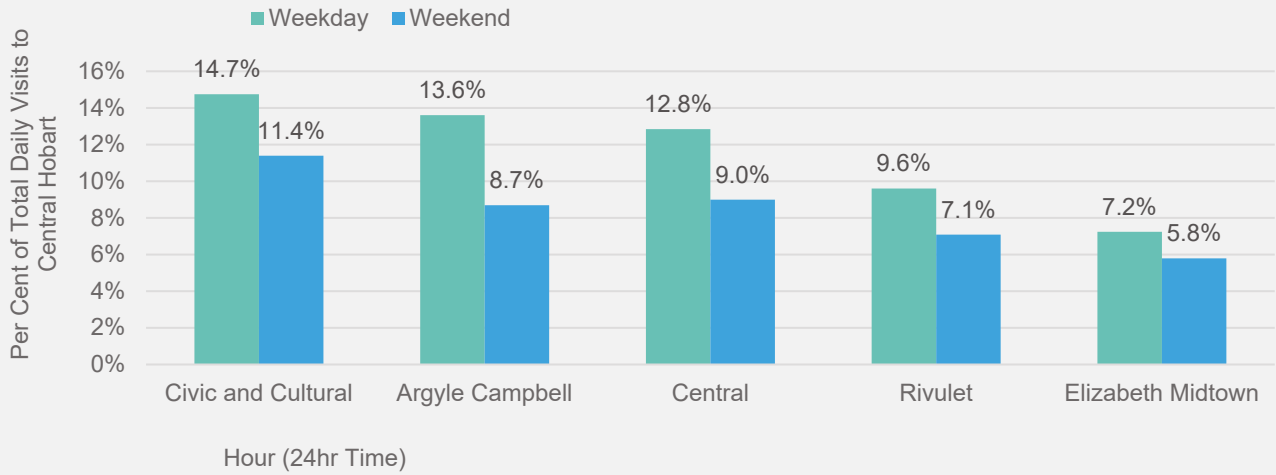
Key findings

Total visitation is shown by day type and sub-precinct splits, with the highest share of activity being weekdays in the Civic and Cultural precinct (14.7 per cent which also has the highest activity on weekends (11.4 per cent of Central Hobart visits). Argyle Campbell has the second-highest weekday visitation and third-highest weekend visitation, although this is held up significantly by the Royal Hobart Hospital. The least visits occur in Elizabeth Midtown.

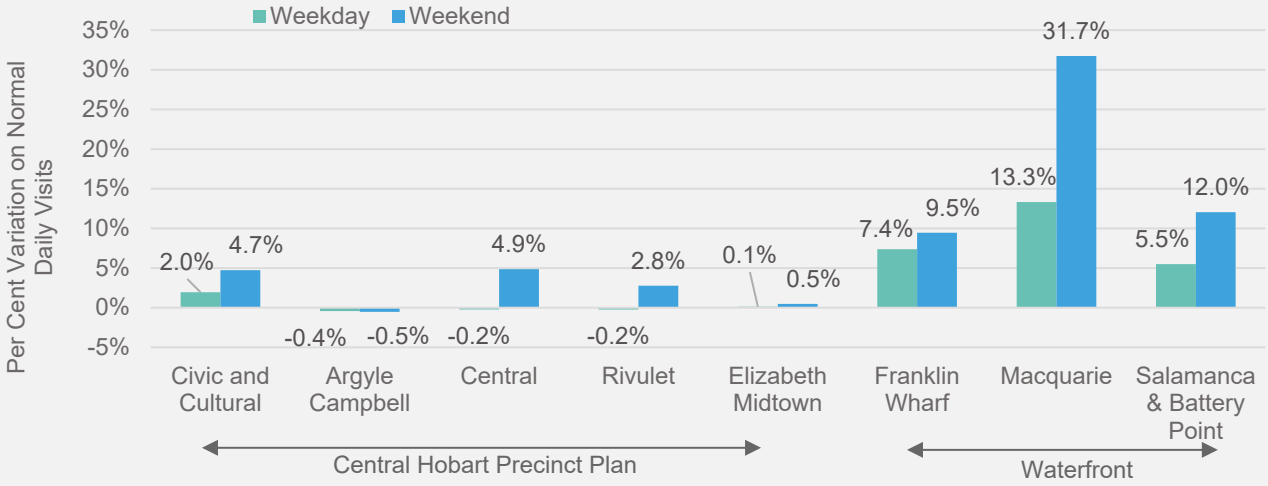
When an event is on such as Dark Mofo there is a significant swing in visitation for certain precincts in Central Hobart. Note that overall visitation is negative relative to the average across 2018 and 2019 due to the time of year in the middle of winter

- The Central precinct has an approximate 4.9 per cent uplift in visits during the Dark Mofo festival on weekends. Similarly, the Civic and Cultural precinct has a 4.7 per cent uplift and Rivulet 2.8 per cent. The other two precincts only show minor or no uplift on weekends during the festival.
- In contrast, the areas where many of the large events occur along the waterfront show major increases in activity during this period. The peak uplift is almost 32 per cent on the weekend in the normally light industrial precinct of Macquarie Wharf and Macquarie Point which is repurposed for events during the festival. This highlights the activity is typically held in close proximity to where the events occur and there is limited spread into the Central Hobart area defined on page 7.

Central Hobart usage by day type
2018 - 2019



Central Hobart daily visit variation due to dark mofo
Dark Mofo Dates vs. June & July Average*, 2018 - 2019



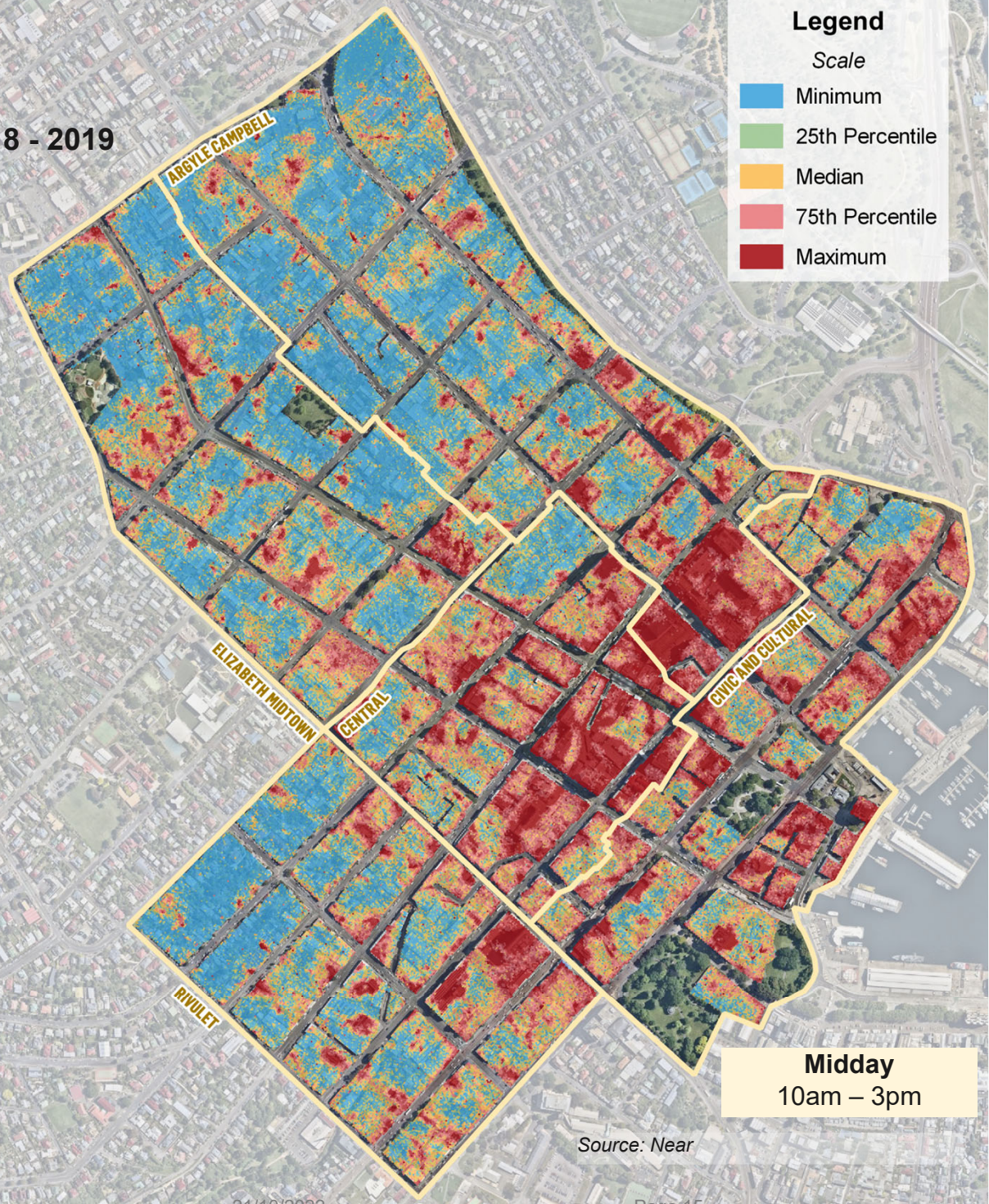
** June and July as a Proxy for Winter Due to Large Shift in Recorded Devices Around August 2019*
Source: Near

VISITATION DISTRIBUTION BY TIME OF DAY

Hourly visits to Central Hobart built environment 2018 - 2019

Daily activity appears to rise towards a peak through the middle of the day with a steep rise in activity in the morning time and a steep drop-off in activity in the afternoon. This reflects the working day, elevated by tourist or retail visitors through the middle of the day in the central areas.

Night-time activity is very low for a central city area with very few hot spots maintained past 7 PM.



Source: Near

TIME OF DAY DETAILED ANALYSIS

Key findings

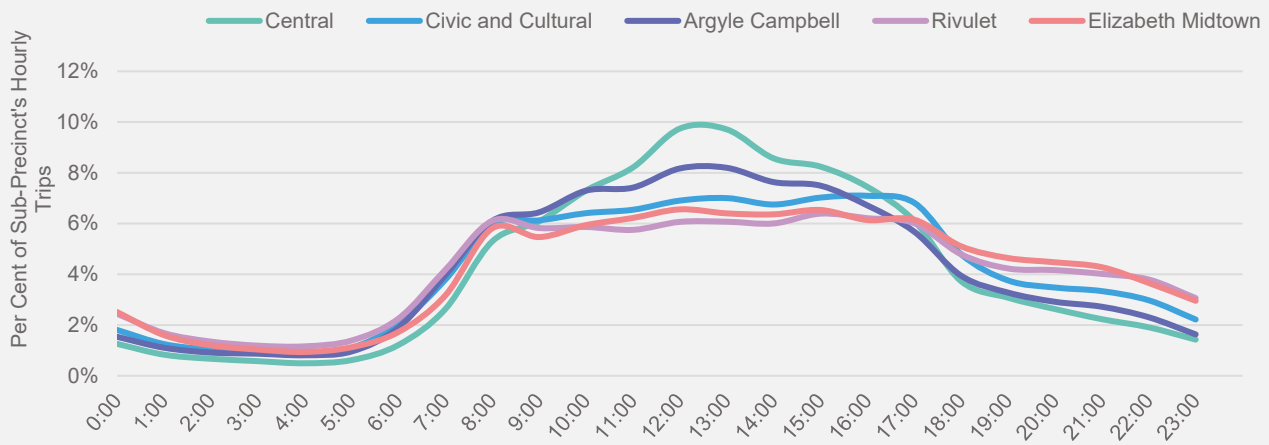
Central Hobart has activity peaks around 8 AM and 5 PM, further illuminating the precinct's activity alignment with the working day. Activity doesn't bottom out until around 3 AM on average which would indicate a precinct with established night-time attractors.

By building type, the following trends emerge from the sample

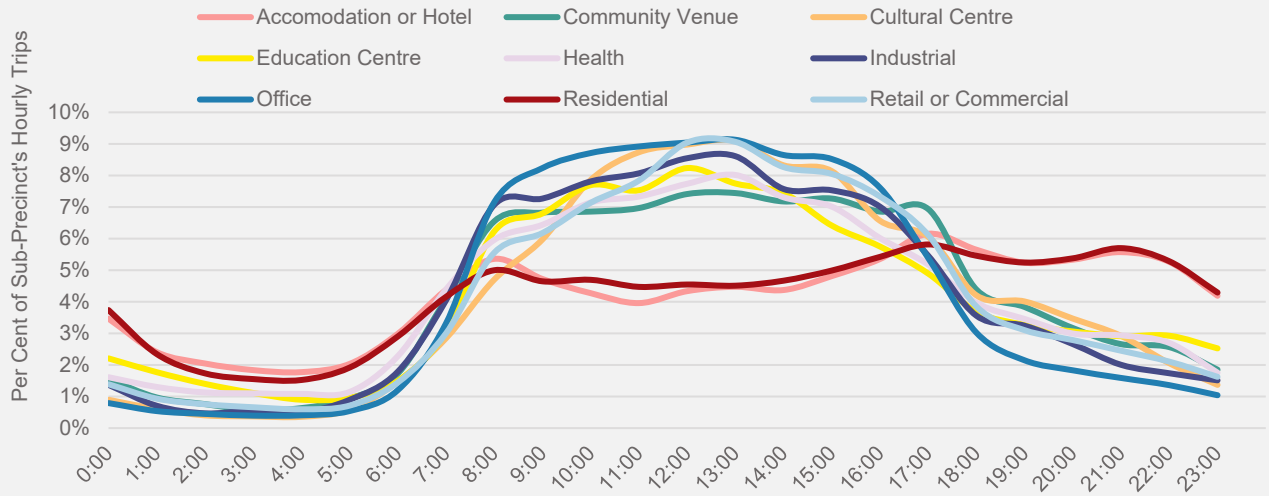
- Health and education centres have sharp inclines and declines in activity at the beginning and end of the working day with very minimal activity observed around this period.
- Community venues, cultural centres and accommodation or hotels have activity that inclines across the day and peaks towards the night time period.
- Office and industrial uses rise at the beginning of the working day but don't tail off until after midnight reflecting the typology of industrial uses in this precinct (predominantly logistics and warehousing with offices attached).
- Residential uses are fairly consistent across the day.

Note: A time of day analysis comparing North and Central Hobart can be found in **Appendix A.**

Central Hobart time of day analysis by precinct
2018 – 2019



Central Hobart time of day analysis by building type
2018 - 2019



Source: Near, LIST

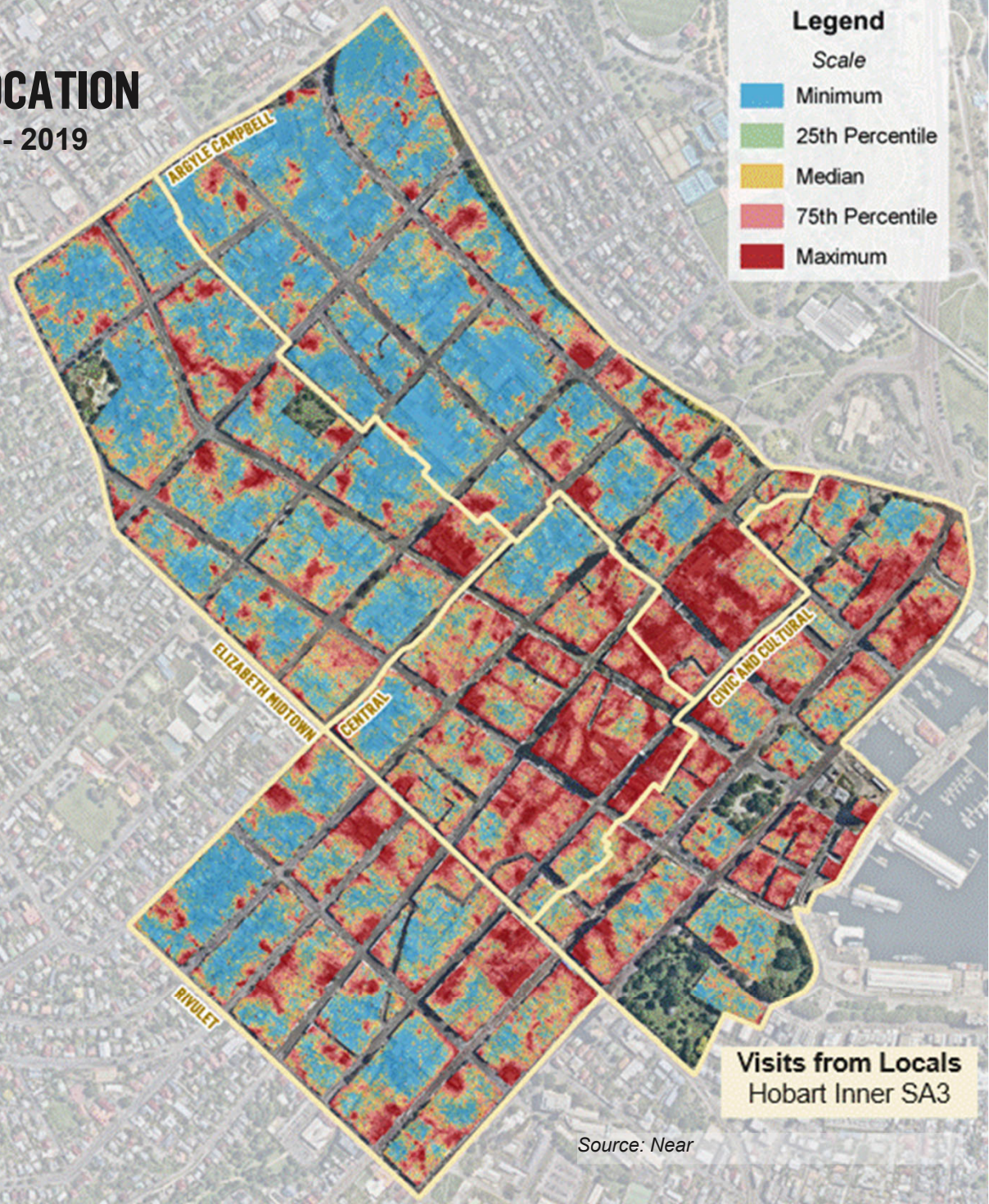
VISITATION DISTRIBUTION BY RESIDENT LOCATION

Total visits to Central Hobart built environment 2018 - 2019

Each recorded device has a common evening location that can be used to infer the residential location of the visitor. We have aggregated these residential locations into ABS and State Government geographies to look at trends by visitors from various visitor categorisations.

As per the accompanying GIF, we note

- **Locals** (Hobart – Inner SA3 geography) have a widespread of activity in the Central Hobart Precinct Structure Plan Area.
- Residents of **Adjacent Municipalities** (Glenorchy, Clarence, Kingborough) have slightly less visitation in the Central Hobart Precinct Structure Plan Study locals. The activity of people from adjacent municipalities aligns more with sport, employment, and retail buildings.
- Residents of the **Rest of Greater Hobart** rarely visit parts of Central Hobart that are outside the main commercial area. There is a focus on activity around the hospital and adjacent Wellington Centre.
- Residents from the **Rest of Tasmania** come to Central Hobart specifically for the Central Precinct, sports and around the hospital.
- People from **Interstate** show a wider spread across the city as visitors access the cultural and retail precincts within Central Hobart.
- **International tourists** show up predominantly at the Central Precinct and Civic and Cultural Precinct given its proximity to hotels and the cruise terminal.



Source: Near

VISITOR CATEGORY DETAILED ANALYSIS

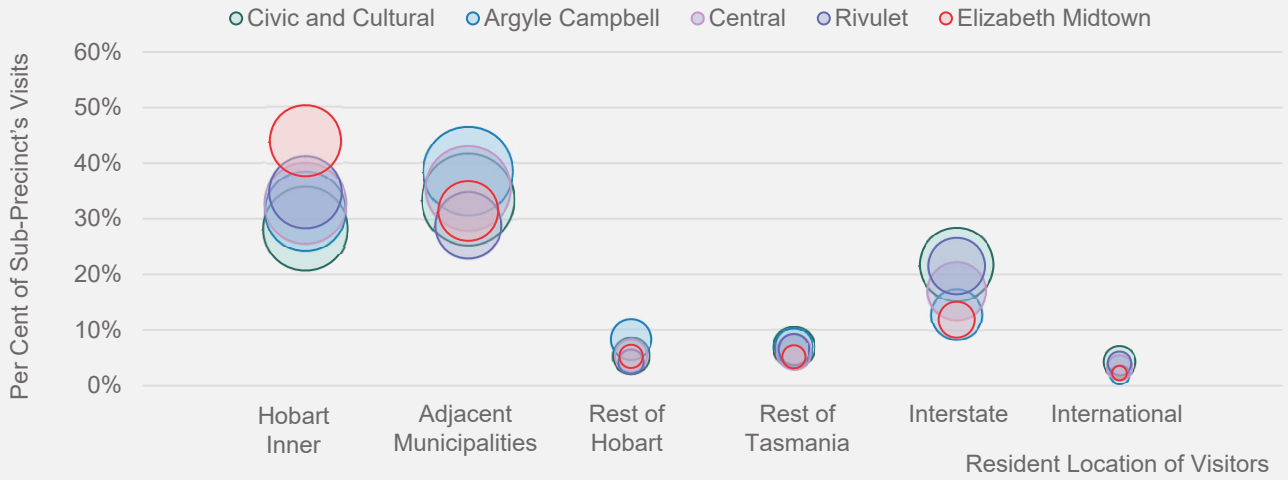
Key findings

As touched on in the previous slide, the majority of visits to Central Hobart pre-Covid were from inner Hobart residents, within approximately 5 km of the precinct. Those in the directly adjacent municipalities also had strong representation.

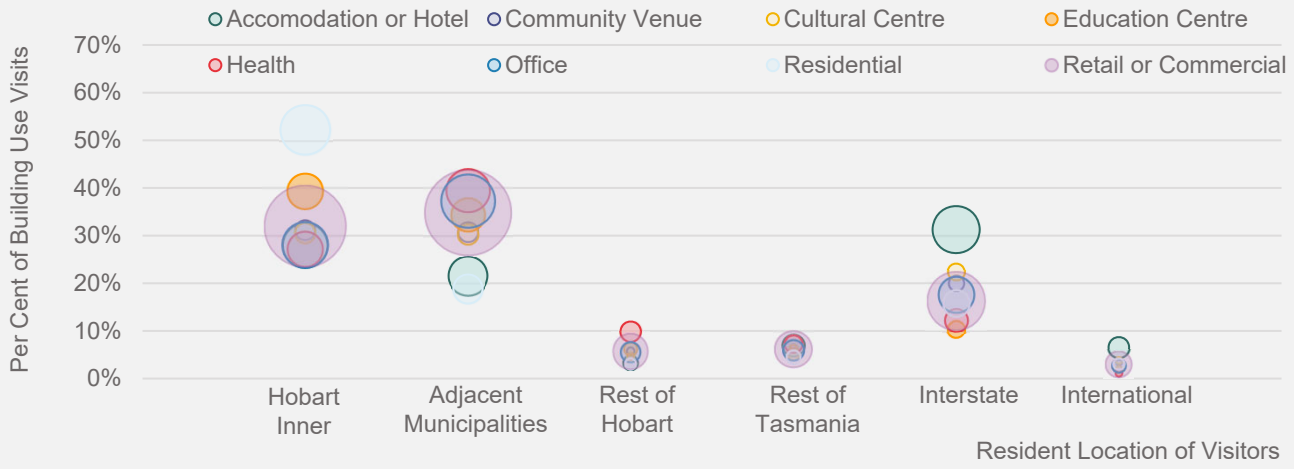
Breaking this down by the building type that these visits were recorded within

- **Hobart Inner** residents made up the majority of visits to residential buildings and retail / commercial buildings. Equally, they represented a large proportion of those in Education centres and office buildings.
- **Adjacent municipalities** worked in or attended retail or commercial buildings in Central Hobart more than any other visitor segment. The majority of pings were to residential and retail/commercial buildings, followed by office and health-related uses.
- Visits from the **Rest of Hobart** were minimal although those that did visit went to health, commercial/retail, and community buildings. The **rest of Tasmania's** visitation showed similar trends.
- The relatively large number of **Interstate** and **International visitors** could be found within the local retail / commercial establishments or back at the accommodation/hotels.

Central Hobart resident location of visitors
Bubbles Sized by Total Visits Number, 2018 - 2019



Central Hobart resident location of visitors by building type
Bubbles Sized by Total Visits Number, 2018 - 2019



Source: Near, LIST

03

LOCAL MOBILITY



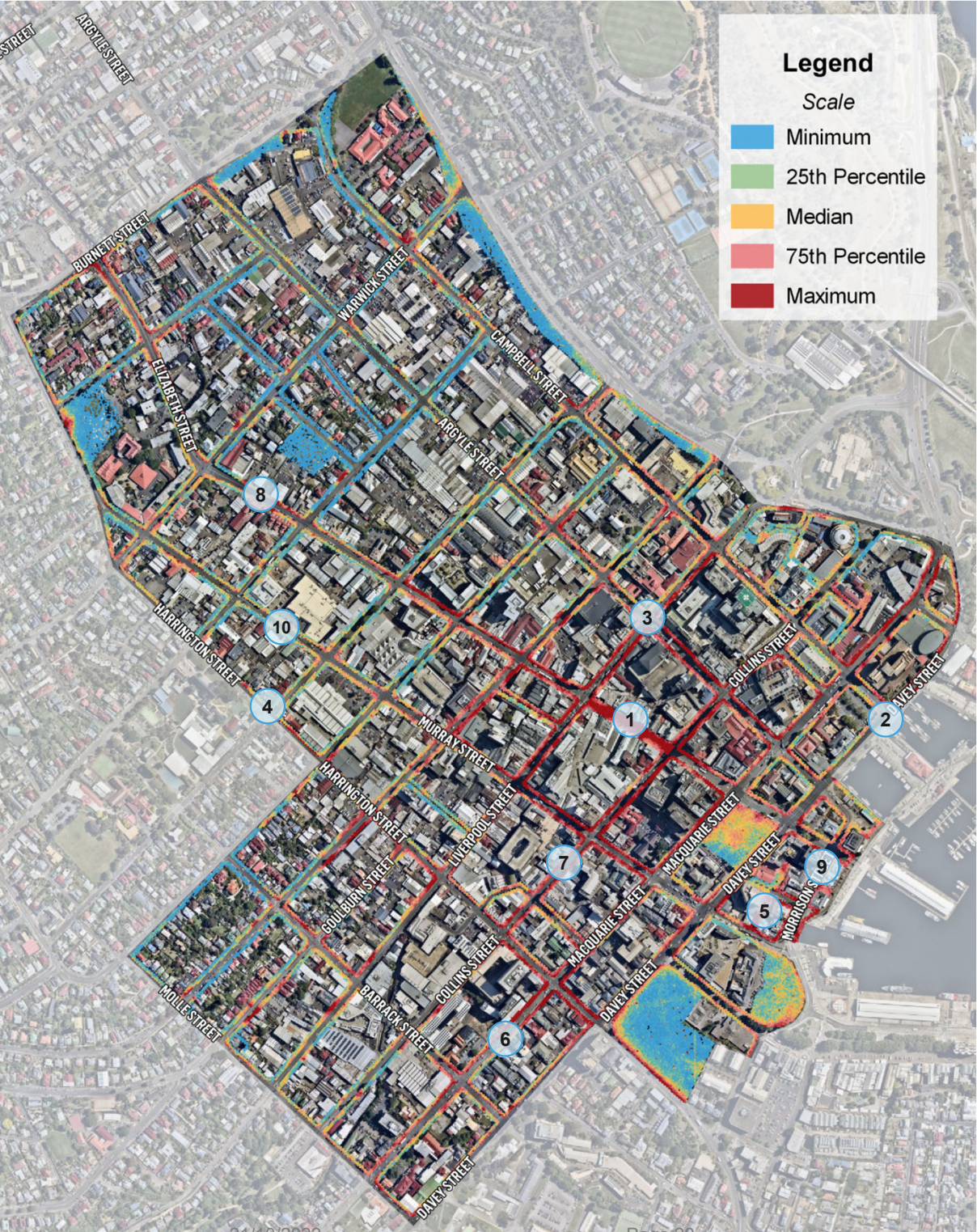
MOST USED PEDESTRIAN LINKS

Visits per sq.m to Central Hobart public open space and footpaths filtered list, 2018 - 2019

Top pedestrian and public spaces

Visits per Sq.m, 2018 - 2019

1	Elizabeth Mall	11.8
2	Davey Street	8.4
3	Liverpool Street	7.2
4	Harrington Street	7.2
5	Despard Street	7.1
6	Macquarie Street	7.1
7	Collins Street	6.7
8	Elizabeth Street	6.4
9	Morrison Street	5.6
10	Murray Street	5.0



PRECINCT USAGE BY TIME OF DAY

Hourly visits to Central Hobart public open space and footpaths by time of day (scale indexed to midday) 2018 - 2019

Key Findings

During the morning period, the busiest footpaths were along

- Macquarie Street southwestern end.
- Liverpool Street.
- Elizabeth Street.

This is reflective of workers accessing the commercial buildings and street-front retail in the morning. This trend continues to a lesser extent throughout the day before declining in the evening.

The footpaths along Elizabeth Street, particularly in the mall had high levels of usage. reflective of it being a major retail destination.

There were lower levels of footpath activity north of Bathurst Street, reflective of the lower concentration of trip attractors in this part of Central Hobart.



Source: Near

CROSS USAGE BETWEEN PLACES IN THE PRECINCT

Key findings

Using the HMD for visitors across the study period in 2018-2019, the locations within Central Hobart were assessed to determine which locations had the highest level of cross usage. Cross usage relates to places visited within the same day and shows

- Centrepoint shopping centre and Cat & Fiddle Arcade (48 per cent).
- Hotel Grand Chancellor and Federation Concert Hall (36.6 per cent).
- Hobart GPO and Deloitte Building (10.1 per cent).
- UTAS Medical Science Building and Royal Hobart Hospital (25 per cent).

There is a high level of interaction between key retail areas such as Cat & Fiddle Arcade, Mathers Place, and Centrepoint Shopping Centre.

The data shows that there is a 14.4 per cent cross usage between the Hotel Grand Chancellor and Federation Concert Hall. This suggests that there is a desire-line between some tourism-related destinations and cultural destinations.

Note: For precinct definitions, refer to page 7.

Central Hobart cross usage
2018 - 2019

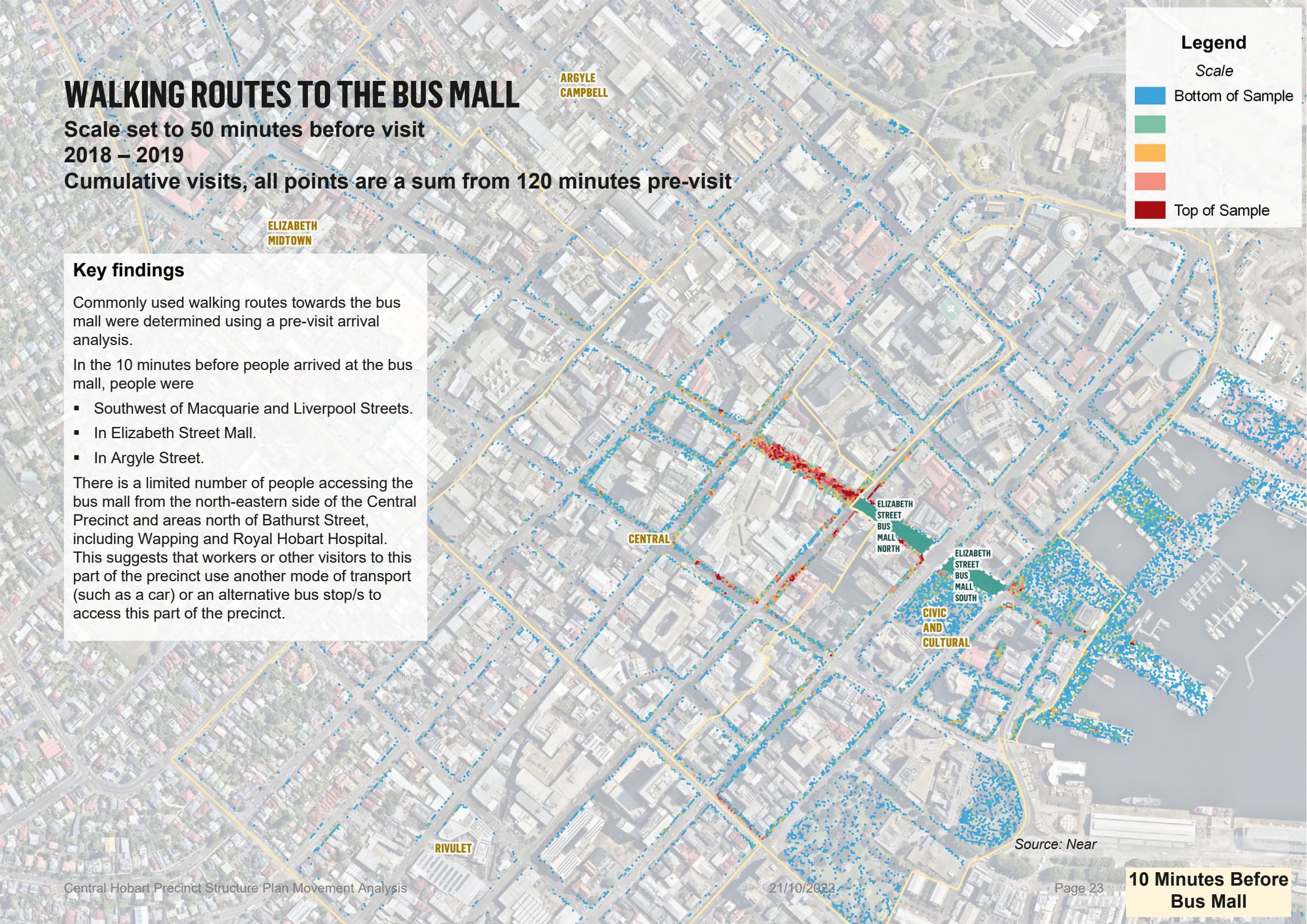
Smallest | 2nd Smallest | 3rd Smallest | 3rd Largest | 2nd Largest | Largest

No.	Precinct (Origin Below)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
1	Cat & Fiddle Arcade	-	13.0%	16.0%	16.0%	8.0%	6.0%	1.0%	2.0%	1.0%	4.0%	1.0%	3.0%	4.0%	2.0%	1.0%	2.0%	3.0%	1.0%	1.0%
2	Royal Hobart Hospital	12.0%	-	15.0%	3.0%	2.0%	4.0%	1.0%	2.0%	1.0%	4.0%	1.0%	2.0%	2.0%	1.0%	0.0%	1.0%	1.0%	1.0%	3.0%
3	Wellington Centre	30.0%	32.0%	-	7.0%	5.0%	5.0%	1.0%	3.0%	1.0%	8.0%	1.0%	4.0%	4.0%	2.0%	1.0%	1.0%	2.0%	2.0%	2.0%
4	Centrepoint Shopping Centre	49.0%	9.0%	11.0%	-	6.0%	5.0%	1.0%	2.0%	1.0%	2.0%	0.0%	2.0%	3.0%	2.0%	1.0%	1.0%	2.0%	1.0%	1.0%
5	Trafalgar Centre	37.0%	13.0%	13.0%	9.0%	-	6.0%	1.0%	3.0%	1.0%	3.0%	2.0%	7.0%	17.0%	3.0%	1.0%	3.0%	2.0%	2.0%	1.0%
6	Elizabeth Street North	11.0%	7.0%	5.0%	3.0%	2.0%	-	7.0%	2.0%	1.0%	1.0%	0.0%	2.0%	2.0%	1.0%	1.0%	1.0%	2.0%	1.0%	1.0%
7	Elizabeth College	9.0%	5.0%	5.0%	2.0%	2.0%	27.0%	-	1.0%	1.0%	1.0%	0.0%	1.0%	2.0%	2.0%	0.0%	1.0%	2.0%	1.0%	1.0%
8	Hotel Grand Chancellor Hobart	8.0%	9.0%	5.0%	2.0%	2.0%	3.0%	1.0%	-	13.0%	1.0%	1.0%	2.0%	2.0%	3.0%	1.0%	2.0%	1.0%	5.0%	2.0%
9	Federation Concert Hall	8.0%	8.0%	5.0%	2.0%	3.0%	3.0%	1.0%	36.0%	-	1.0%	1.0%	1.0%	2.0%	3.0%	1.0%	2.0%	1.0%	5.0%	1.0%
10	Tasmanian Polytechnic	31.0%	39.0%	35.0%	5.0%	6.0%	5.0%	1.0%	3.0%	1.0%	-	1.0%	8.0%	5.0%	1.0%	1.0%	1.0%	1.0%	2.0%	2.0%
11	Hobart General Post Office	19.0%	14.0%	12.0%	4.0%	13.0%	6.0%	1.0%	5.0%	2.0%	4.0%	-	26.0%	20.0%	3.0%	1.0%	3.0%	1.0%	4.0%	2.0%
12	Deloitte Building	20.0%	16.0%	13.0%	4.0%	11.0%	6.0%	1.0%	3.0%	1.0%	7.0%	7.0%	-	13.0%	3.0%	1.0%	2.0%	1.0%	2.0%	2.0%
13	ANZ Centre	20.0%	11.0%	10.0%	4.0%	16.0%	6.0%	1.0%	3.0%	1.0%	3.0%	4.0%	9.0%	-	4.0%	1.0%	3.0%	1.0%	2.0%	2.0%
14	St Michael's Collegiate	9.0%	6.0%	5.0%	3.0%	3.0%	4.0%	1.0%	4.0%	1.0%	1.0%	1.0%	2.0%	4.0%	-	1.0%	2.0%	1.0%	2.0%	1.0%
15	Salamanca Court Precinct	11.0%	5.0%	5.0%	4.0%	3.0%	4.0%	1.0%	5.0%	1.0%	1.0%	1.0%	2.0%	3.0%	3.0%	-	21.0%	1.0%	3.0%	1.0%
16	Parliament Square	10.0%	5.0%	4.0%	2.0%	4.0%	3.0%	1.0%	3.0%	1.0%	1.0%	1.0%	2.0%	4.0%	2.0%	9.0%	-	1.0%	2.0%	1.0%
17	State Library of Tasmania	23.0%	7.0%	7.0%	6.0%	3.0%	8.0%	3.0%	2.0%	1.0%	1.0%	0.0%	1.0%	2.0%	2.0%	1.0%	2.0%	-	1.0%	1.0%
18	Tasmanian Museum & Art Gallery	12.0%	12.0%	8.0%	3.0%	3.0%	4.0%	1.0%	13.0%	5.0%	2.0%	1.0%	3.0%	4.0%	3.0%	2.0%	3.0%	1.0%	-	2.0%
19	UTAS - Medical Sciences Building	11.0%	25.0%	10.0%	2.0%	2.0%	5.0%	1.0%	4.0%	1.0%	2.0%	1.0%	2.0%	3.0%	2.0%	1.0%	1.0%	1.0%	2.0%	-

Source; Near
Note: Cross-Usage can be greater than 100 per cent given there will be multiple visits to separate spaces by the same device

WALKING ROUTES TO THE BUS MALL

Scale set to 50 minutes before visit
2018 – 2019
Cumulative visits, all points are a sum from 120 minutes pre-visit



Key findings

Commonly used walking routes towards the bus mall were determined using a pre-visit arrival analysis.

In the 10 minutes before people arrived at the bus mall, people were

- Southwest of Macquarie and Liverpool Streets.
- In Elizabeth Street Mall.
- In Argyle Street.

There is a limited number of people accessing the bus mall from the north-eastern side of the Central Precinct and areas north of Bathurst Street, including Wapping and Royal Hobart Hospital. This suggests that workers or other visitors to this part of the precinct use another mode of transport (such as a car) or an alternative bus stop/s to access this part of the precinct.

10 Minutes Before Bus Mall

TOP ANT TRAILS FROM THE CAR PARKS

Where people's device went 60 min post visiting a car park (See Appendices for larger images) 2018 – 2019

Once drivers have parked in Central Hobart, they tend to move towards the employment centres of the Hospital and Elizabeth Street as well as the cultural draws of Franklin Wharf and Wapping. On weekends, people stay closer to the car parks or they operate at reduced hours. This is reflective of fewer people accessing Central Hobart for employment on the weekend. Larger versions of these images are shown in **Appendix B**. The Location of these car parks are outlined in **Appendix C**.

	Argyle Street Car park	Market Place Car park	Dunn Place Car park
Weekday			
Weekend			

TOP ANT TRAILS FROM THE CAR PARKS

Where people's device went 60 min post visiting a car park (See Appendices for larger images)
2018 – 2019

	Hobart Central Car park	Melville Street Car park
Weekday		
Weekend		

CAR PARK USERS – PLACES VISITED

Key findings

The top destinations for people parking in the three major car parks in Central Hobart are broadly made up of commercial office / retail areas and key employment attractors such as

- Royal Hobart Hospital.
- Cat & Fiddle Arcade.
- Wellington Centre.

The above finding suggests that a high number of people are parking and driving to Central Hobart to access the Royal Hobart Hospital.

Certain car parks are also popular for those who attended cultural institutions or tourism-related destinations such as

- Hotel Grand Chancellor.
- Tasmanian Museum and Art Gallery.

Only certain car parks had high occupancy in this category, however, including Dunn Place car park due to the concentration of tourist and cultural activity around Franklin Wharf and Salamanca.

Central Hobart car parks cross usage
2018 - 2019

Smallest | 2nd Smallest | 3rd Smallest | 3rd Largest | 2nd Largest | Largest

No.	Index Precinct	Area (Origin Below)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
1	Cat & Fiddle Arcade	Vodaphone Central Car park	4.4%	5.4%	4.9%	0.7%	1.4%	1.8%	0.3%	0.7%	0.2%	0.6%	0.3%	1.1%	1.3%	1.7%	0.2%	0.3%	0.5%	0.4%	1.0%
2	Royal Hobart Hospital																				
3	Wellington Centre																				
4	Centrepoint Shopping Centre																				
5	Trafalgar Centre	Melville Street Car park	3.2%	3.7%	2.3%	0.5%	0.8%	2.2%	0.3%	0.4%	0.2%	0.3%	0.2%	0.5%	0.7%	0.6%	0.1%	0.3%	0.4%	0.3%	1.0%
6	Elizabeth Street North																				
7	Elizabeth College	Melville South-West Ticketed Car park	4.2%	1.3%	1.5%	1.1%	1.1%	1.7%	0.3%	0.5%	0.2%	0.3%	0.1%	0.5%	0.5%	0.7%	0.1%	0.3%	2.6%	0.3%	0.3%
8	Hotel Grand Chancellor Hobart																				
9	Federation Concert Hall	Hobart Central Car park	7.4%	1.6%	1.4%	2.7%	0.7%	1.9%	0.4%	0.4%	0.2%	0.3%	0.1%	0.3%	0.4%	0.5%	0.2%	0.3%	3.6%	0.3%	0.3%
10	Tasmanian Polytechnic																				
11	Hobart General Post Office	Argyle Street Car park	8.5%	9.5%	13.3%	1.5%	1.2%	1.3%	0.3%	0.7%	0.2%	4.2%	0.2%	1.0%	0.9%	0.4%	0.2%	0.3%	0.4%	0.4%	0.5%
12	Deloitte Building																				
13	ANZ Centre	Dunn Place Car park	3.5%	4.6%	2.0%	1.0%	1.2%	1.3%	0.4%	4.9%	1.9%	0.6%	0.3%	0.8%	1.1%	1.3%	0.4%	0.9%	0.5%	4.6%	0.7%
14	St Michael's Collegiate																				
15	Salamanca Court Precinct	Patrick Street Secure Parking	4.0%	4.3%	3.8%	0.6%	0.4%	3.2%	0.4%	0.4%	0.1%	0.2%	0.2%	0.3%	0.4%	0.4%	0.0%	0.4%	0.3%	0.3%	0.4%
16	Parliament Square																				
17	State Library of Tasmania	Market Place Car park	3.7%	16.6%	3.5%	0.8%	1.2%	0.8%	0.1%	1.6%	0.4%	0.8%	0.3%	1.3%	0.8%	0.4%	0.1%	0.3%	0.2%	1.3%	0.4%
18	Tasmanian Museum & Art Gallery																				
19	UTAS - Medical Sciences Building																				

Source; Near
Note: Cross-Usage can be greater than 100% given there will be multiple visits to separate spaces by the same device

CAR PARK USERS – RESIDENT LOCATION

Key findings

Using the Common Evening Location of the HMD, the resident location of car park users was determined.

The size of bubbles in the figures on the right are sized by the total number of visits.

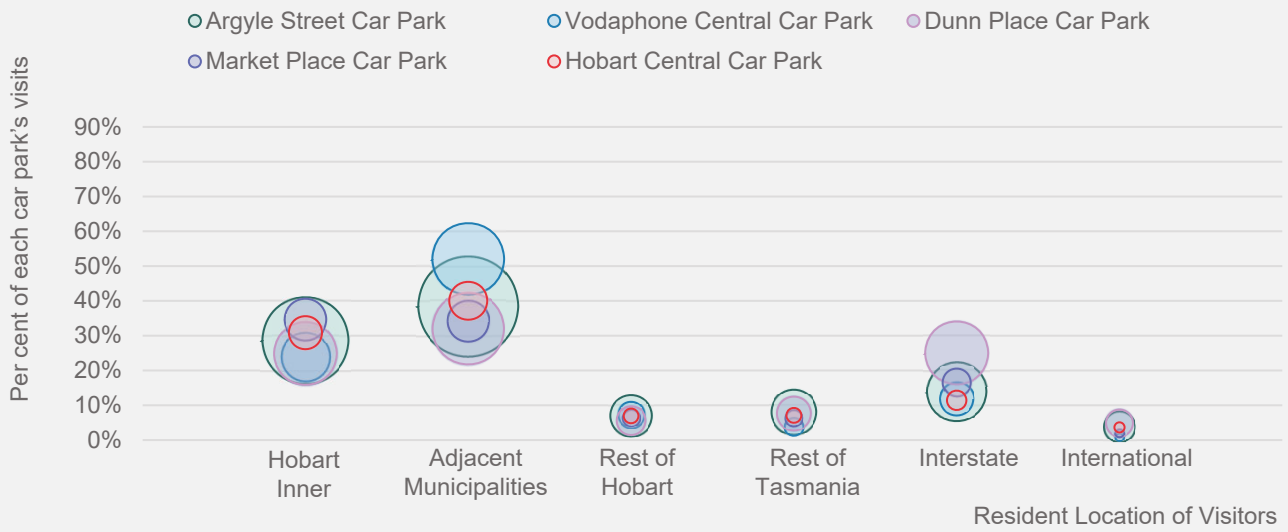
As shown on the right, visits from adjacent municipalities accounted for the vast majority of trips to car parks. This could indicate that people who do not live in the suburbs immediately surrounding Central Hobart are more likely to drive to Central Hobart rather than catch public transport.

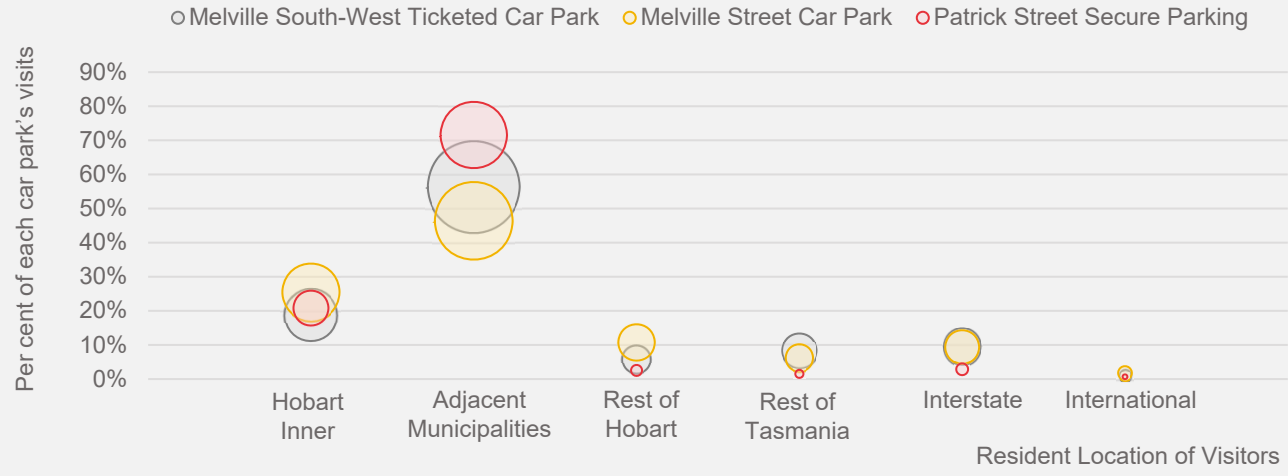
Car parks with notably high percentages of trips from adjacent municipalities include

- Melville South-West Ticketed Car park.
- Melville Street Car park.
- Patrick Street Secure Parking.

These car parks may be particularly popular due to their proximity to the bulk of the commercial buildings within Central Hobart and other major trips attractors such as UTAS.

Central Hobart resident location of visitors to car parks
Bubbles Sized by Total Visits Number, 2018 - 2019





Source: Near

DISPERSION FROM THE CRUISE SHIP TERMINAL

Scale set to 10 minutes after visit
2018 – 2019
Cumulative visits

Key findings

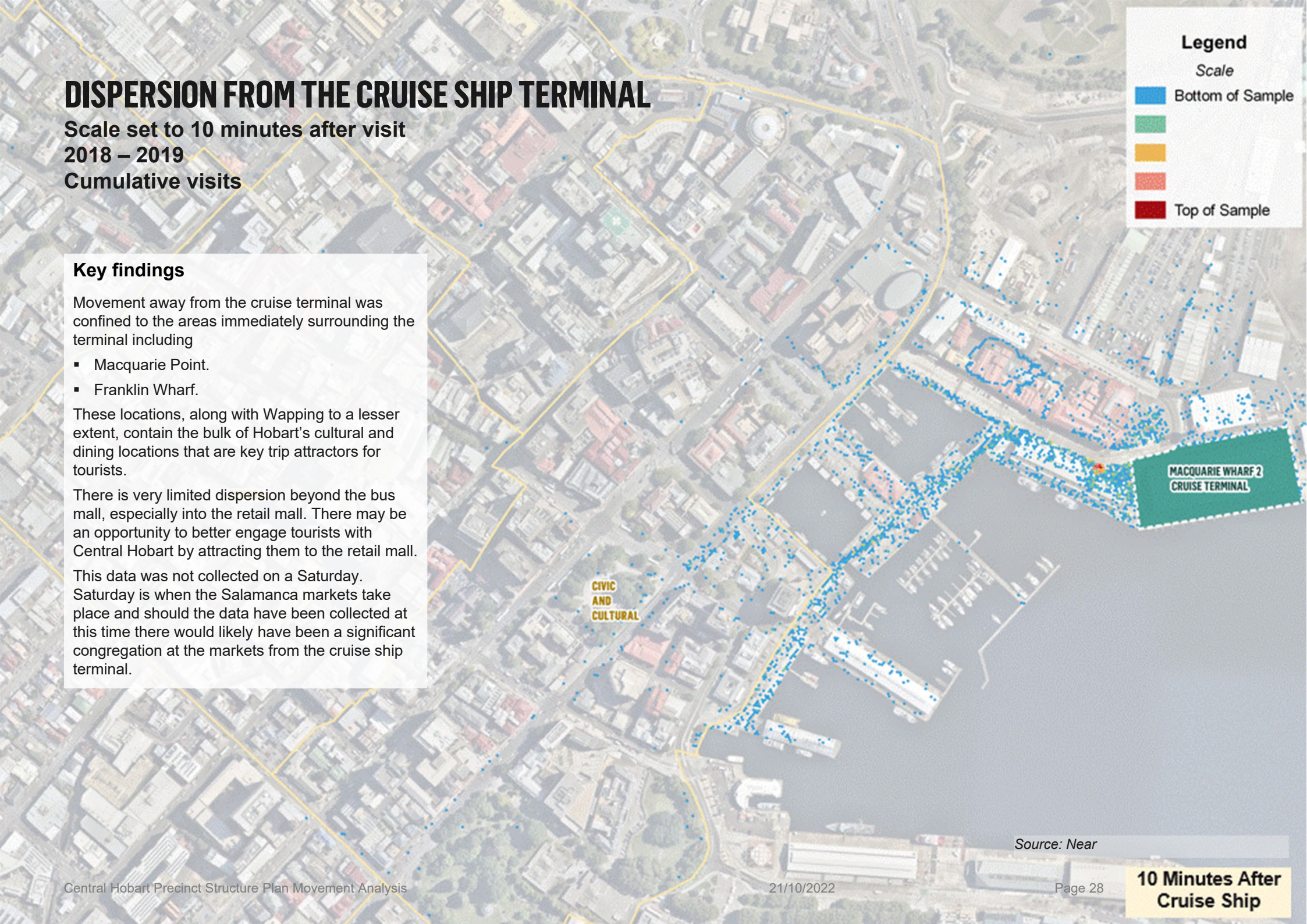
Movement away from the cruise terminal was confined to the areas immediately surrounding the terminal including

- Macquarie Point.
- Franklin Wharf.

These locations, along with Wapping to a lesser extent, contain the bulk of Hobart's cultural and dining locations that are key trip attractors for tourists.

There is very limited dispersion beyond the bus mall, especially into the retail mall. There may be an opportunity to better engage tourists with Central Hobart by attracting them to the retail mall.

This data was not collected on a Saturday. Saturday is when the Salamanca markets take place and should the data have been collected at this time there would likely have been a significant congregation at the markets from the cruise ship terminal.



Source: Near

10 Minutes After Cruise Ship

04

MOBILITY TO AND FROM CENTRAL HOBART



WHERE ARE PEOPLE ACCESSING CENTRAL HOBART FROM?

Resident location of pings, randomised within travel zone
2018 - 2019

Key findings

The Common Evening Location (CEL) was used to determine where people were travelling from to access different parts of Central Hobart. The CEL was assigned to different parts of Hobart based on the walking distance from the Study Area. Anywhere within a 45-minute walk of the Study Area was considered “inner”, anywhere beyond that was considered “outer”.

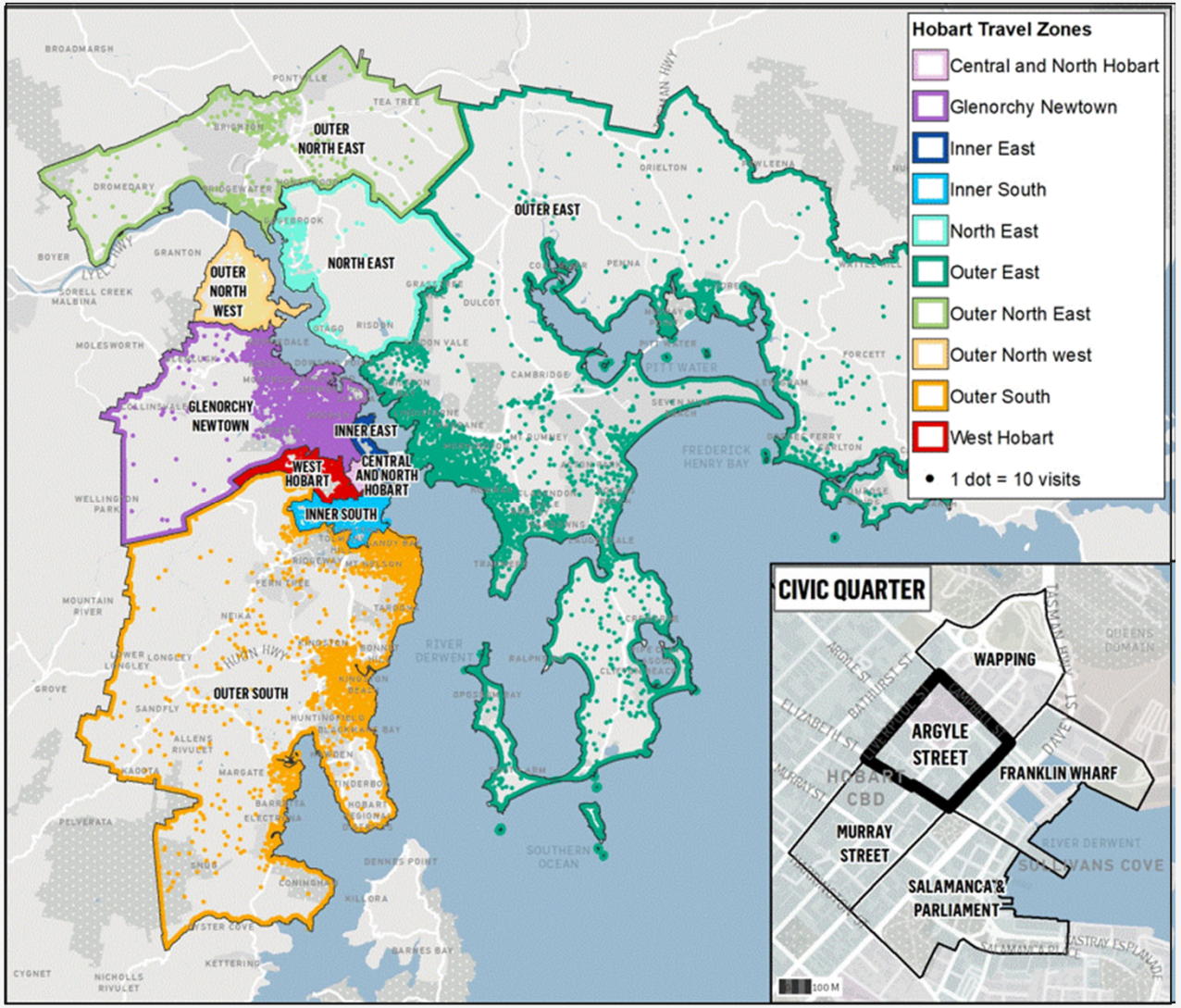
The Argyle and Murray Street areas, as well as Central and Bathurst Streets have the highest level of visitation from greater Hobart which is unsurprising given they are the employment and retail centres of Hobart.

Areas north of Bathurst Street have significantly lower levels of visitation. With visits being more concentrated in the areas immediately surrounding Central Hobart. This is likely due to the fewer amenities and employment opportunities in these areas.

Note: All Common Evening Locations are randomised within a Travel Zone to maintain anonymity.

Note: The 45-minute proxy for walking was determined using estimated walk times from local residential areas on Google Maps. 45 minutes is a good proxy as this is a typical ‘maximum’ acceptable walk time for adults walking to work (based on a walk speed of 4.5 km per hour for 45 minutes being just over 3 km).

Visitation to Central Hobart precinct from Greater Hobart



Source: Near,

WHERE ARE PEOPLE ACCESSING CENTRAL HOBART FROM?

Hobart Travel Model

Key findings

The Hobart Travel Model was reviewed to determine where people were coming from outside Central Hobart for comparison with the relevant information from the HMD.

The commercial areas around Elizabeth and Murray Streets are the most-visited parts of Central Hobart. These are major retail and employment centres for Hobart.

The areas of Greater Hobart which saw the most trips to Central Hobart include

- Inner South.
- Outer East.

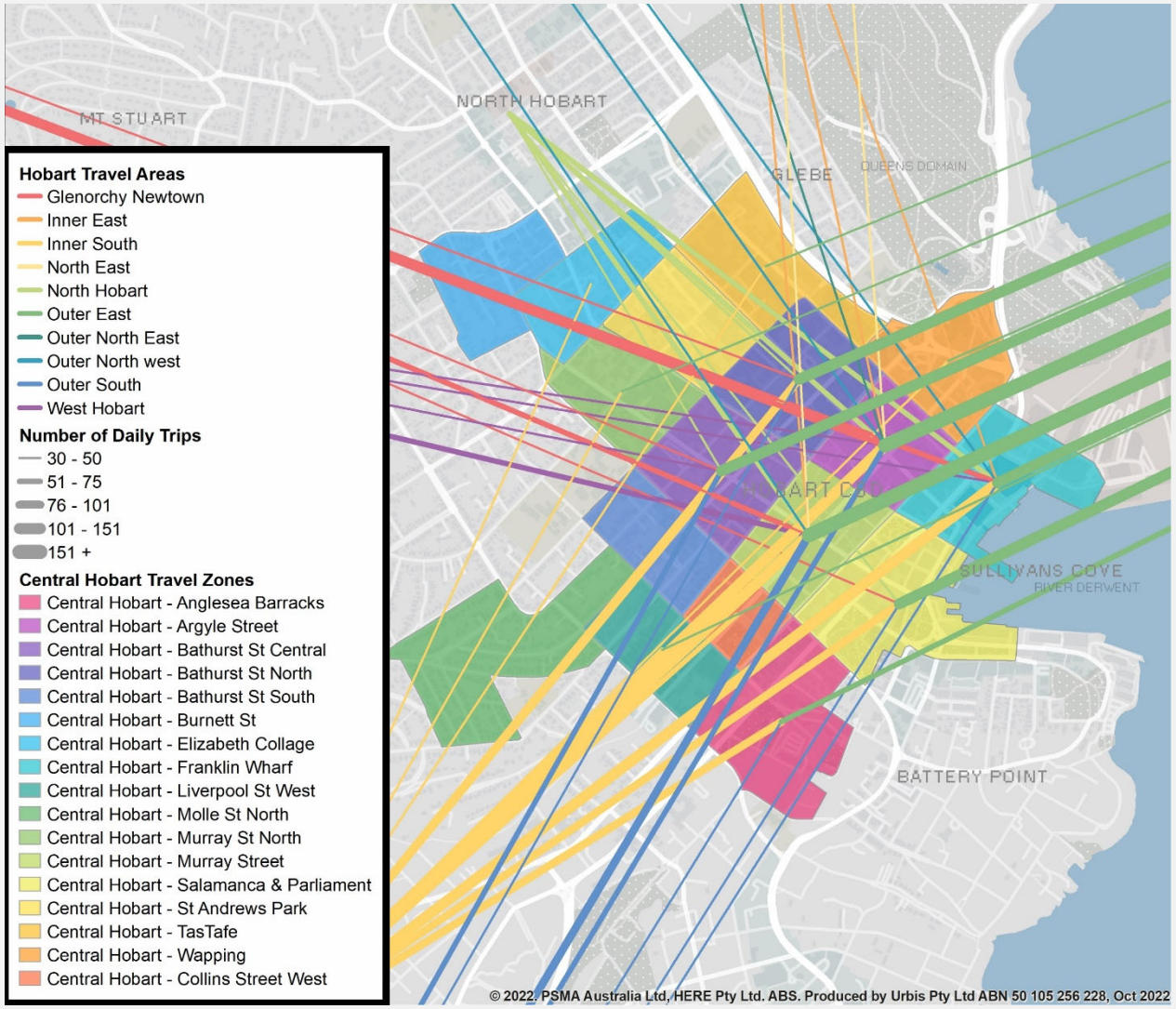
Given that Central Hobart is the main employment centre for Greater Hobart, the majority of work-related trips are towards Central Hobart.

There is also good representation at Franklin Wharf from the Outer East. All other travel zones also have good representation from the Outer East.

Areas to the north of Bathurst Street were accessed significantly less than other parts of Central Hobart. This is likely reflective of the reduced level of retail and employment trip attractors in this part of Central Hobart

Note: The Hobart Travel Model is owned and was developed by the Department of State Growth. To identify how many people are travelling to each destination from each origin, for what purpose and by what mode at various times of the day.

Hobart Travel Model – Daily trips to Central Hobart by travel zone area

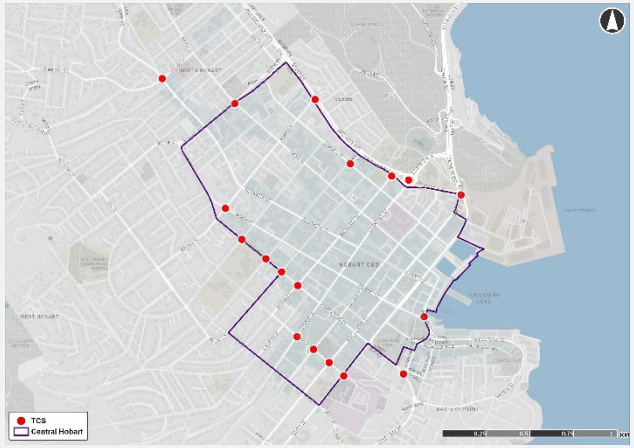


Source: Urbis

TOTAL VEHICLE ENTRIES AND EXITS TO CENTRAL HOBART

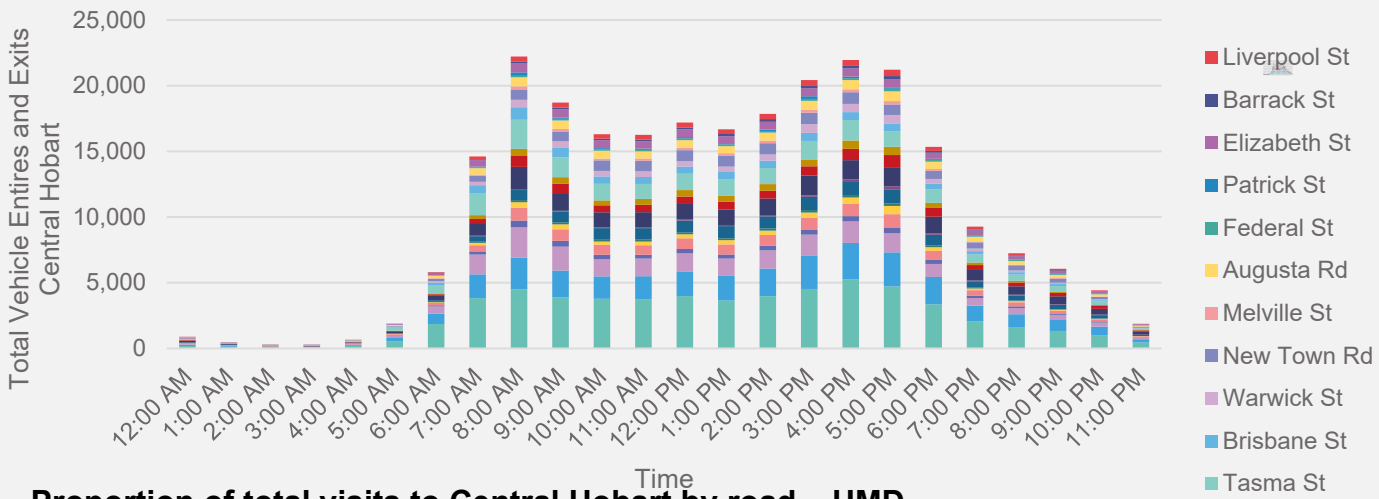
Key findings

- The roads running roughly northeast to southwest such as Macquarie and Davey Streets carry the most traffic through the precinct. These roads provide a connection between Hobart's southern suburbs and the Tasman Highway.
- Macquarie and Davey Streets are key connectors also carrying people commuting from the eastern side of the Derwent River into the Hobart CBD.
- Elizabeth Street and Argyle Street are identified as the main north-south connector within the Study Area and provide connection to Hobart's northern suburbs and the CBD.
- Key northwest to southeast routes are Harrington and Argyle Streets.

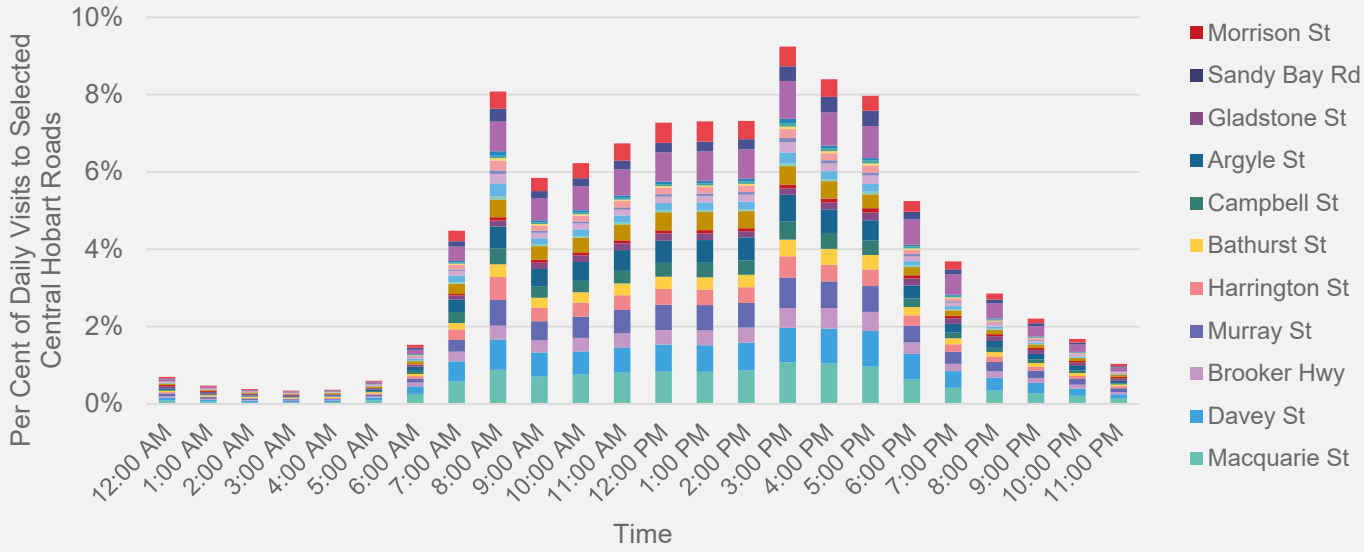


*Note: A larger version of this diagram can be found in **Appendix D.***

Central Hobart total entries and exits May 19 2021 – SCATS traffic data



Proportion of total visits to Central Hobart by road – HMD



Source: Near, SCATS

BUS STOPS USAGE BY TIME OF DAY

Key findings

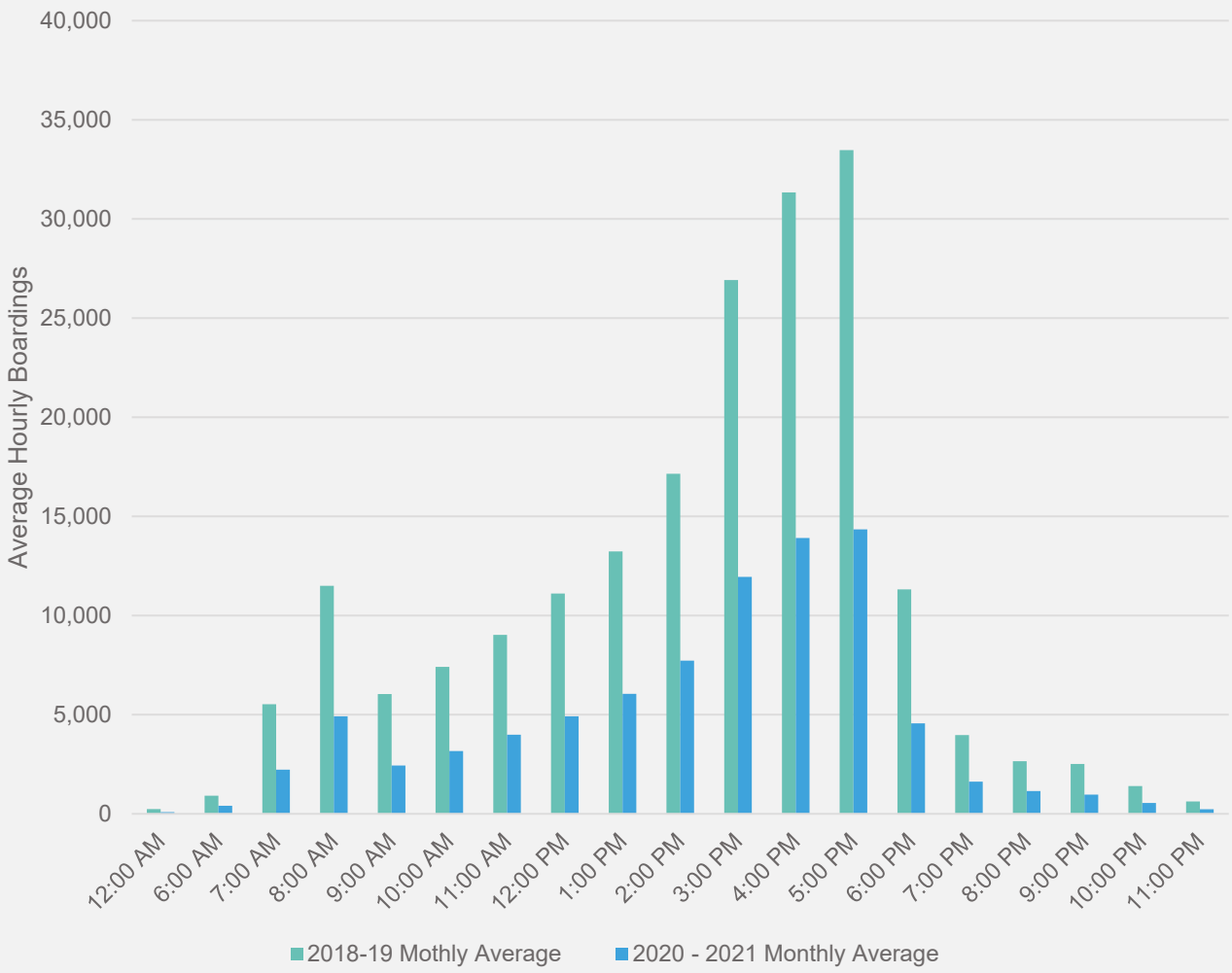
Monthly boarding data from all bus stops located in Central Hobart was analysed between 2018-2019 and 2020 to determine the change in public transport usage.

The following was identified

- There was a significant drop in the number of boardings pre Covid and during Covid restrictions and immediately after.
- The average hourly difference of monthly boardings between pre Covid and during Covid restrictions / immediately after is a 58 per cent reduction.
- This may suggest that fewer people are choosing to catch public transport post-Covid, as well as changes in working habits (e.g work from home).

Note: Data was not available past August 2021

Central Hobart average monthly bus boardings by hour – Pre-Covid vs Post-Covid



CENTRAL HOBART HOURLY CAR PARK OCCUPANCY DATA

Key findings

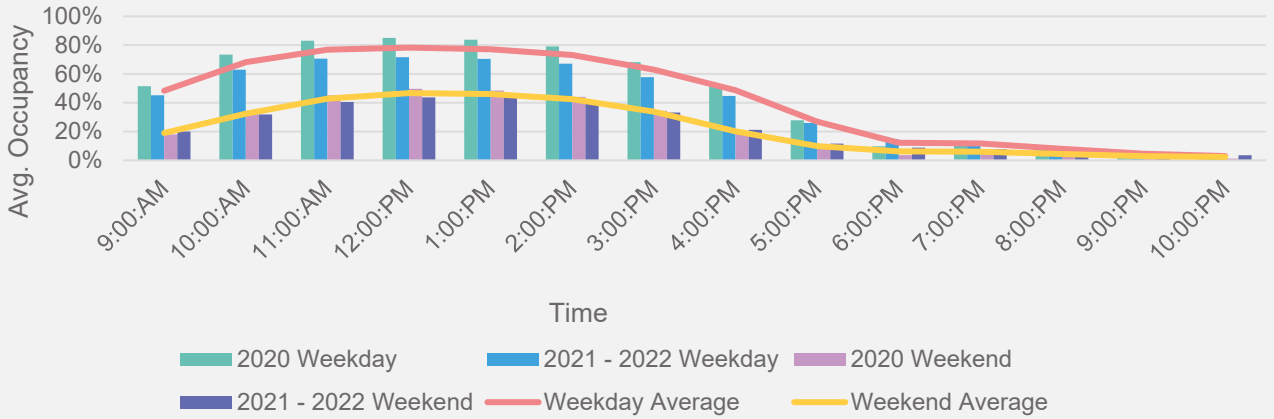
Data provided by the City of Hobart Between 2020 and 2022 was analysed to determine the average occupancy of the multi-story car parks within Central Hobart and the Dunn Place Car Park. Key findings include

- Peak average multi-storey car park usage across all weekday dates is 78 per cent at 12 PM reflecting strong daytime usage.
- In contrast, peak average multi-story car park usage across all weekend dates is 47 per cent at 12 PM.
- Average morning weekday occupancy at 10 AM is 77 per cent, suggesting that there is a high level of car usage as the mode of travel for CBD workers.

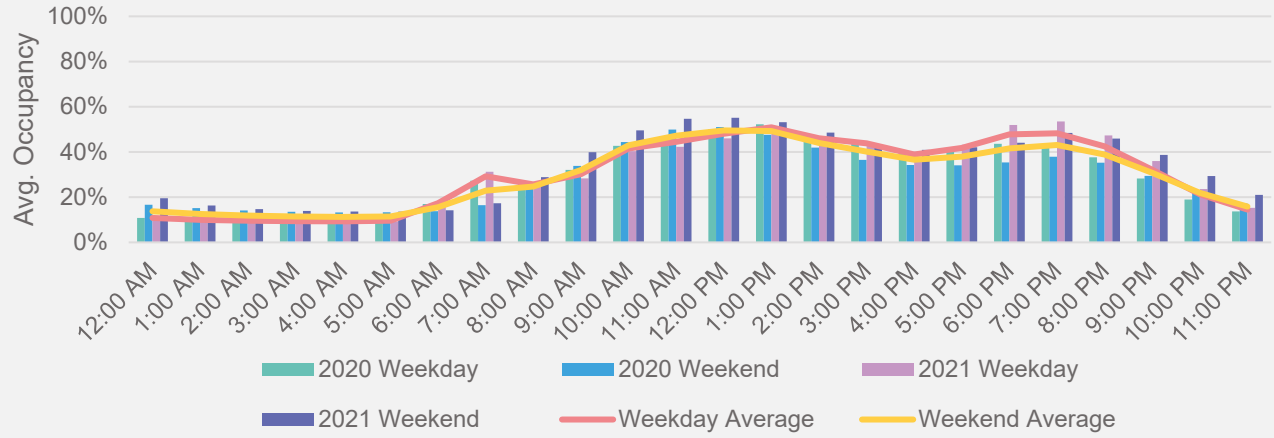
The UTAS Apartments car park saw an increase in car parking usage between 2020 and 2021, this is likely reflective of changed travel behaviours as result of Covid and the effects of limited lockdowns in 2021.

As a guide, parking is considered to be well-utilised, but not overly subscribed at 85 per cent occupancy. This analysis shows that there is some additional parking capacity in the area, particularly at weekends.

Hobart multi storey car park average hourly occupancy



UTAS apartments car park average hourly occupancy



Note: Multistorey car parking Data provided was for all multistorey car parks within the Hobart CBD, not just those within Central Hobart. Data for multistorey car parks was provided between September 2020 and January 2022.

UTAS apartment Car Parking Data also included meter data from Macquarie Street, Argyle Street, and Franklin Wharf immediately surrounding the car park. Data provided from these meters was recorded for January 2020 to September 2020

05

FINDINGS SUMMARY



KEY FINDINGS



Where are people visiting from and where are they visiting?

The majority of visitation is coming from inner Hobart or adjacent municipalities.

The key land uses driving the majority of activity include

- Royal Hobart Hospital.
- Cultural Institutions around Franklin. Wharf and Wapping.
- Key retail precincts such as Cat & Fiddle Arcade.

Refer to Pages 15 and 17.



When are people visiting?

The highest rate of visitation follows a traditional workday pattern between mid-morning and late afternoon.

Night-time activity is very low for a central city area with very few hot spots maintained past 7:00 PM.

Refer to Page 15.



What is the degree of tourism to Central Hobart?

Visitors to major event such as Dark Mofo do not permeate much beyond the waterfront.

Refer to Page 14.



What are the main pedestrian routes and areas?

There is a network of key streets which forms the main pedestrian and public spaces of central Hobart. These are Elizabeth Mall, Davey Street, Liverpool Street, Harrington Street, Despard Street and Macquarie Street. There is an opportunity to further strengthen the pedestrian offering and 'join up' these spaces to create a more cohesive pedestrian environment and attract tourists to a greater variety of destinations.

Refer to Page 20.



Is there enough parking?

Weekdays are significantly busier in multi-story car parks than weekends, at around 78 per cent and 47 per cent respectively. Even though weekdays have a higher demand for parking, there is ample parking (85 per cent being the benchmark), allowing some flexibility for reallocation of on-street parking for better uses.

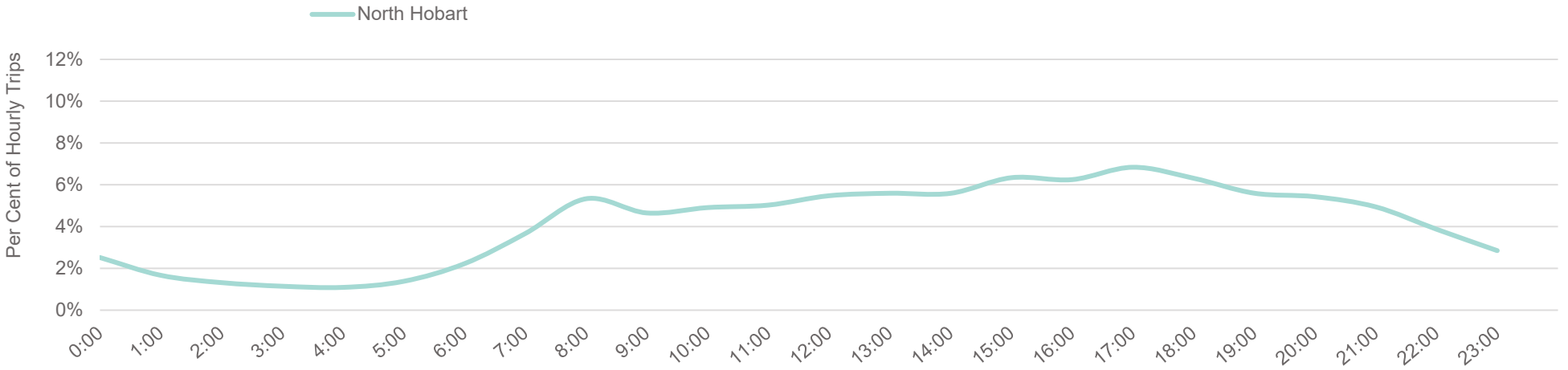
Refer to Page 32.



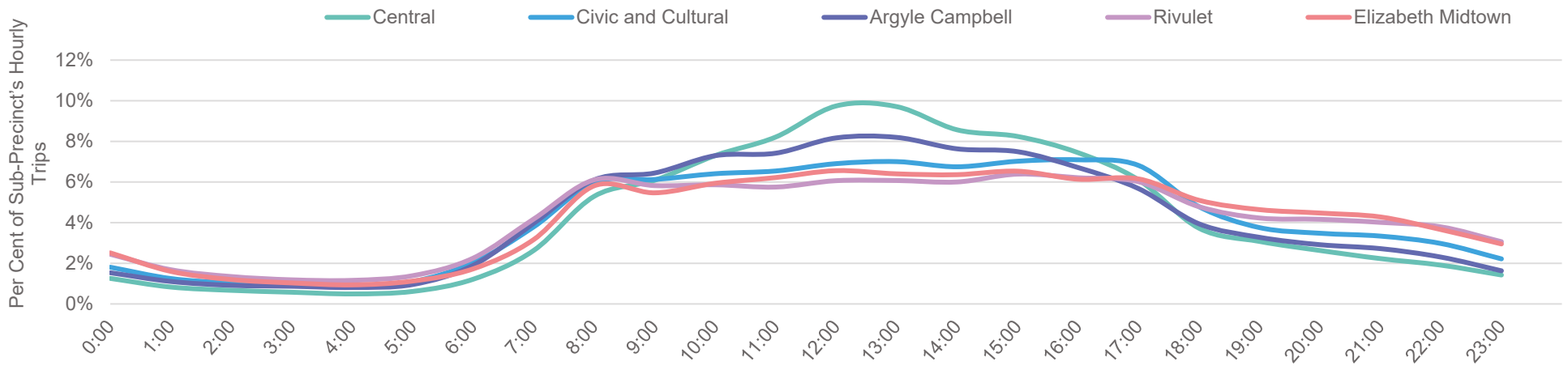
APPENDIX A – COMPARISON OF NORTH HOBART AND CENTRAL HOBART ACTIVITY LEVELS

TIME OF DAY ANALYSIS

North Hobart Precinct time of day analysis
2018 – 2019



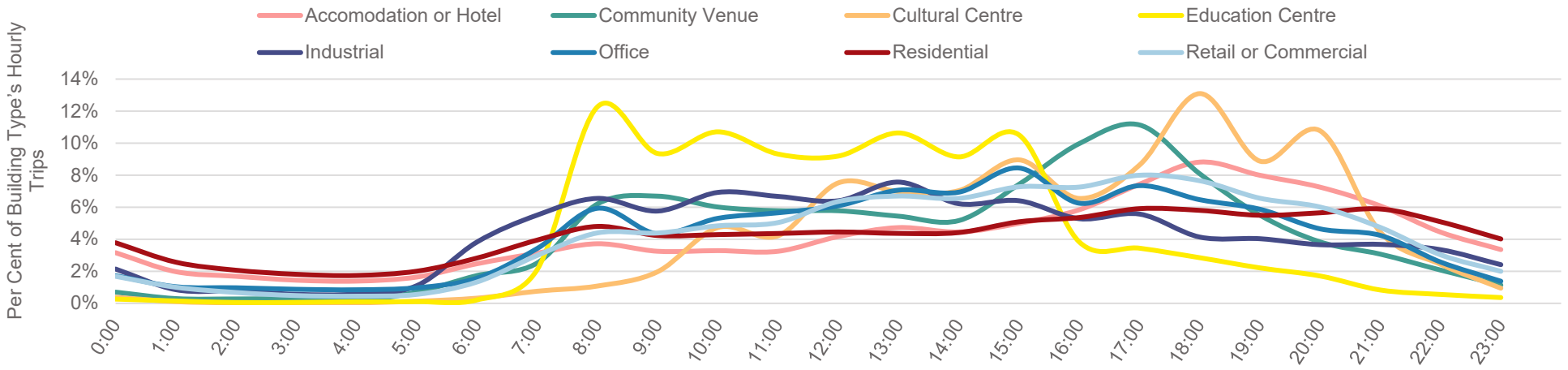
Central Hobart Precinct time of day analysis
2018 - 2019



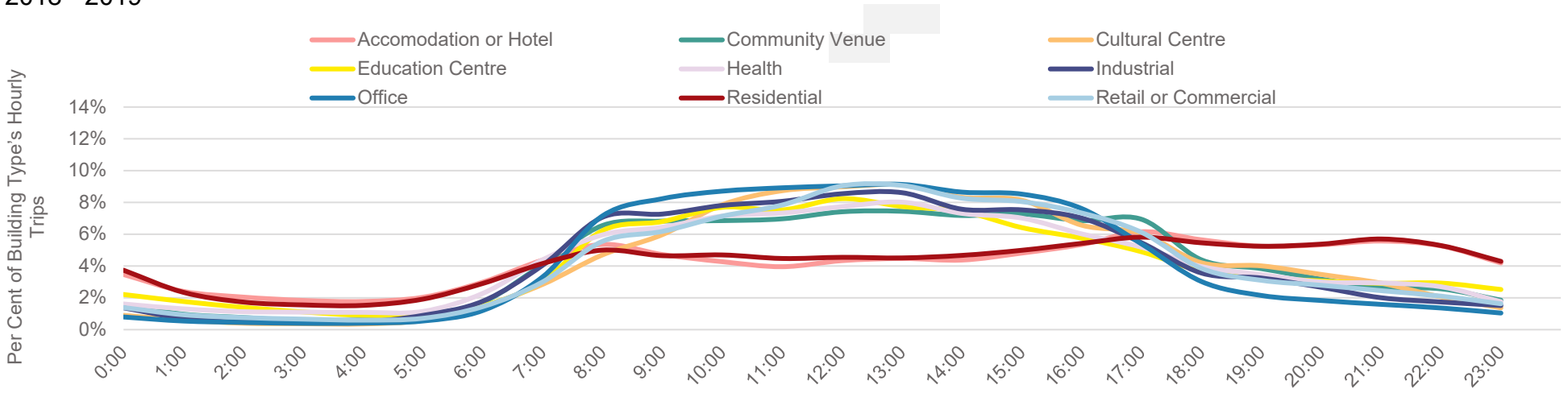
Source: Near, LIST

TIME OF DAY ANALYSIS

North Hobart Precinct time of day analysis by building type
2018 – 2019



Central Hobart Precinct time of day analysis by building type
2018 - 2019



Source: Near, LIST

APPENDIX B – ANT TRAILS



ARGYLE STREET CAR PARK ANT TRAILS

2018 – 2019

Weekday



Weekend



MARKET PLACE CAR PARK ANT TRAILS

2018 – 2019

Weekday



Weekend



DUNN PLACE CAR PARK ANT TRAILS

2018 – 2019

Weekday



Weekend



HOBART CENTRAL CAR PARK ANT TRAILS

2018 – 2019

Weekday



Weekend



MELVILLE SOUTHWEST CAR PARK ANT TRAILS

2018 – 2019

Weekday



Weekend



APPENDIX C – ANT TRAIL CAR PARKS



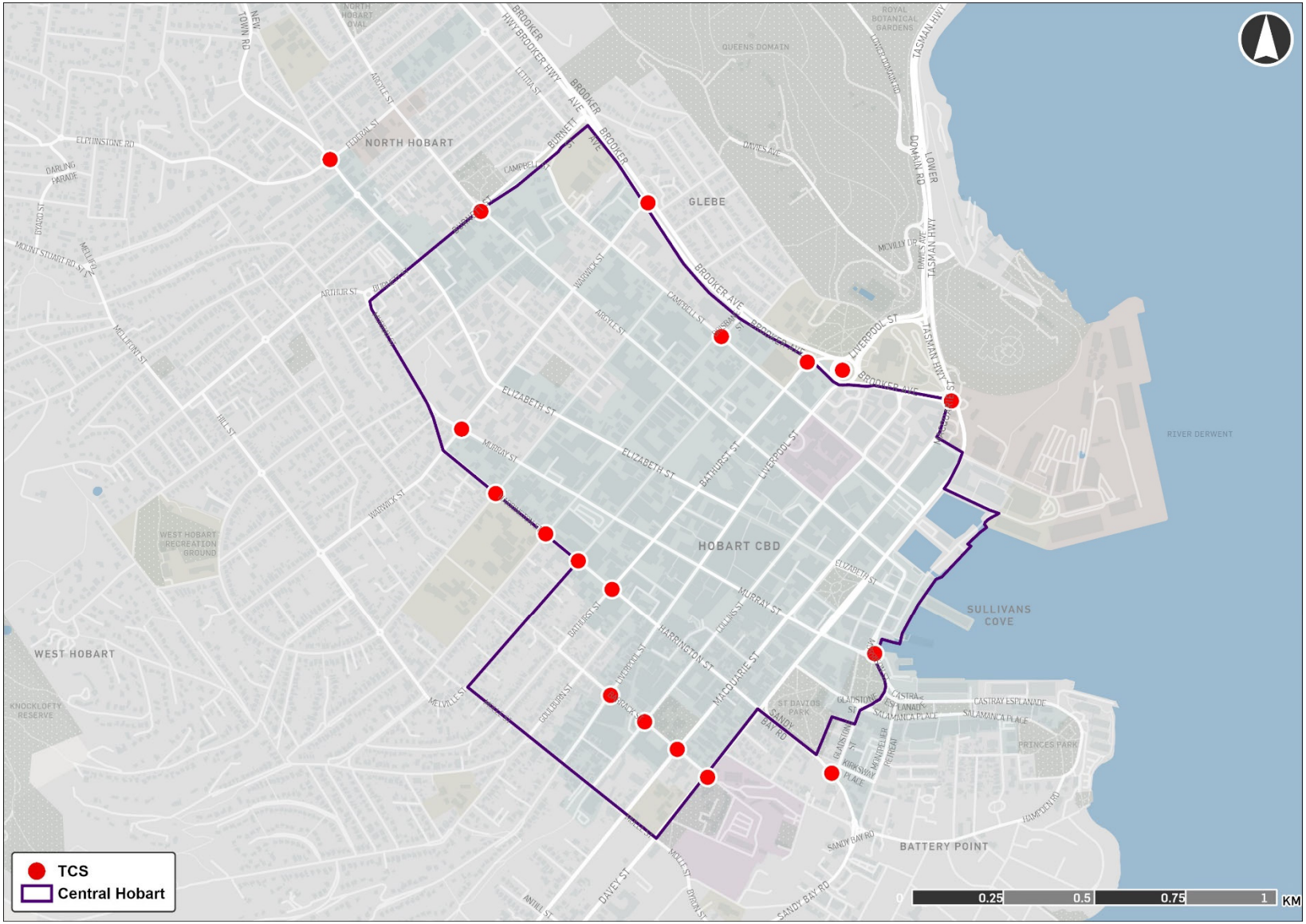
ANT TRAIL CAR PARKS

Car Park	Address
Argyle Street Car Park	38 Argyle St, Hobart TAS 7000
Market Street Car Park	6 Market Pl, Hobart TAS 7000
Dunn Place Car Park	3 Davey St, Hobart TAS 7000
Hobart Central Car Park	60 Melville St, Hobart TAS 7000
Melville Street Car Park	90 Melville St, Hobart TAS 7000

APPENDIX D – LOCATION OF SCATS SITES



TCS LOCATIONS FOR VEHICLE ENTRY AND EXIT CORDON ANALYSIS



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