

Corangamite Shire Tourism Opportunities Study

Corangamite Shire Council

DECEMBER 2010



URBAN PLANNING • LAND ECONOMICS • TOURISM PLANNING

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GLOSSARY

Corangamite CMA	This is the area that is defined by the Catchment Management Authority. It is used for the ABARE statistics provided by the ABS.
Great Ocean Road Region	This includes the municipalities of Surf Coast, Colac Otway, Corangamite and Warrnambool.
Country Victoria	This refers to all Tourism Regions outside Melbourne defined by the ABS.
ABS	Australian Bureau of Statistics, responsible for national statistics relating to population and industry.
TRA	Tourism Research Australia
NVS	National Visitor Survey - An Australian wide phone survey of more than 80,000 respondents per year.
IVS	International Visitor Survey - A survey of international visitors to Australia conducted in international airport departure lounges Australia wide.
Overnight Visitor	In the NVS an Overnight Visitor is someone who is taking a trip involving a stay away from home for at least one night, at a place at least 40km from home.
Visitor Nights	Visitor Nights refer to the number of nights spent away from home in association with individual visits.
Daytrip visitors	Daytrip visitors are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel.
International Visitors	International Visitors are those who are visiting Australia, and staying away from their home Country for less than 12 months.
Average Length of Stay	Average length of stay is expressed in numbers of days and calculated by dividing guest nights by guest arrivals.
Bed Spaces	Three quarter beds are counted as one bed space; double beds as two bed spaces. Cots are excluded.
Capacity	Capacity in terms of Guest Rooms/Units or Bed spaces is the maximum number available to accommodate paying guests during the survey period.
Establishments	The number of Hotels, Motels and Guest Houses and Serviced Apartments within the scope of the survey, which operated for any part of the survey period.
Guest Arrivals	The total number of paying guests counted on the first night they stayed in the accommodation establishment.
Guest Rooms	The total number of rooms available at each establishment at the end of the survey period for accommodating short term paying guests. Units and apartments within serviced apartments are treated as rooms in these survey results.
Occupancy	Occupancy in terms of room nights refers to the total number of nights each paying guest stayed during the survey period.
Occupancy Rate	Occupancy Rates represents Occupancy expressed as a percentage of total capacity available during the survey period. $\text{Room Occupancy rate (\%)} = \frac{\text{Room Nights Occupied}}{(\text{Guest Rooms}) * (\text{Room Nights Available})}$
Persons Employed	The total number of persons working at each accommodation establishment at the end of the survey period.
Room Nights	Number of rooms physically occupied.
Guest Nights	The number of guests physically staying in the accommodation facility for the particular quarter.
Room Nights Available	The number of Guest Rooms/Units available multiplied by the number of days for which they were available during the survey period. For establishments closing (other than for seasonal reasons) or opening during this period, operating periods only are included.
Small Accommodation Establishments	Accommodation establishments with 5 to 14 rooms.

Large Accommodation
Establishments

Accommodation establishments with 15 rooms or more.

Takings from Accommodation

Gross revenue from the provision of accommodation, including bed taxes. Takings from meals are excluded. Takings from accommodation for each month generally represent the takings received during that month. Where payments are received in advance of, or after, the provision of accommodation to guests, the monthly figure for takings from accommodation may not necessarily bear direct relationship to the number of guests accommodated during that month.

KEY FINDINGS

INTRODUCTION

BACKGROUND

The Corangamite Tourism Opportunities Study was commissioned by Corangamite Shire Council with support from Tourism Victoria and DPCD to identify tourism product and accommodation development opportunities which will contribute to the economic benefits of tourism to the Shire and to identify and remove any barriers for investment. It is understood that whilst Corangamite Shire has iconic natural attractions within Port Campbell National Park and attracts a large number of visitors, the economic benefit to the Shire from these visitors is low due to underdeveloped complementary tourism product.

The Twelve Apostles and Port Campbell National Park within Corangamite Shire are one of Australia's three most recognised natural attractions (along with Uluru and the Great Barrier of Reef). The Twelve Apostles have strong recognition nationally and internationally but are not enhanced by quality branded tourism product in the way that the other two iconic natural attractions are.

The key aims of this study are to:

- Identify the supply, quality and gaps in existing accommodation and tourism product in the Shire;
- Understand why previous tourism developments have not proceeded;
- Understand the strategic policy framework for tourism and planning in the Shire;
- Identify visitor markets and demand for tourism product and accommodation;
- Identify the barriers to tourism development in Corangamite Shire and provide recommendations to remove these barriers and facilitate development including a prospectus for tourism development and amendments to the planning scheme where required.

SHIRE OVERVIEW

Corangamite Shire is a large rural Shire located along Victoria's South West Coast. The Shire includes land from Skipton to the Southern Ocean. Corangamite Shire includes the townships of Camperdown, Port Campbell, Terang, Noorat, Princetown, Derrinallum, Lismore, Simpson, Cobden and Timboon.

The Corangamite Shire is geographically diverse. Within this report Southern Corangamite Shire refers to land south of Camperdown, whilst northern Corangamite Shire refers to land north of Camperdown.



PART A TOURISM OPPORTUNITIES

VISITATION TO CORANGAMITE SHIRE

Urban Enterprises PAVE (Population and Visitor Estimator) model confirms that Corangamite Shire attracts a large number of visitors (approximately 2.6 million visitors annually). This is comprised of around 400,000 overnight visitors and 2.2 million daytrip visitors. Research shows that the vast majority of these visitors are travelling to Corangamite Shire to visit Port Campbell National Park. (Parks Victoria data suggests that over 2 million visitors are attracted to Port Campbell National Park annually). This highlights that whilst Corangamite Shire attracts a large number of visitors, an overwhelming number of these are daytrippers to the Shire who visit Port Campbell National Park. The existing visitation patterns may provide an opportunity to convert daytrippers to overnight visitors and increase visitor yield.

ANNUAL VISITATION	Visitor Days	Total Visitors
Number of Visitors Staying in Commercial Accommodation	262,679	183,951
Number of Visitors Staying in Caravan Parks	108,500	34,300
<i>Sub Total - Number of Visitors Staying in Paid Accommodation (commercial accommodation & caravan parks)</i>	371,179	218,251
Number of Visitors Staying in Their Second Home	242,200	74,900
Number of Visitors Staying with Friends and Relatives	211,069	105,534
Total Number of Overnight Visitors	824,448	398,685
Total Number of Daytrip Visitors	2,186,306	2,186,306
Total Number of Visitors	3,010,754	2,584,991

VISITATION PATTERNS

Understanding the visitor market segments to Corangamite Shire is essential for identifying product and accommodation opportunities that meet market demand. This report has analysed visitors to Corangamite Shire and compared these with the average for municipalities that comprise the Great Ocean Road Region, using data from the National and International Visitor Survey (Tourism Research Australia).

Domestic visitor markets to the Corangamite Shire vary greatly from domestic visitors to the Great Ocean Road Region. Visitors to Corangamite Shire are generally older and have a higher preference for hotel and resort accommodation than those to other municipalities in the Great Ocean Road Region, however there is very little accommodation product available in the Shire which meets this market. Domestic overnight visitors in Corangamite Shire also have a shorter length of stay (1.9 nights compared to 2.7 nights) than the Great Ocean Road Region.

The international visitor profile of Corangamite Shire however is almost identical to that of the Greater Ocean Road Region. This highlights that international visitors are travelling through the entire region, with Corangamite Shire as one of the main stopping points.

International visitors predominantly fall into two groups: young singles/ couples and older married couples. International visitor preferences for accommodation include hotels and resorts, backpackers and caravan parks.

Roy Morgan Segmentation of nature based tourism visitors highlights that the segment's Visible Achievement, Socially Aware and Young Optimism are the key markets for this product which is the primary product in Corangamite Shire. These three segments differ greatly in their socio-economic status and

holiday style. This highlights the need for a broad range of product and accommodation types to match market demand.

Visitors to Corangamite Shire undertake significantly less activities than visitors to other municipalities in the Great Ocean Road Region. This may be due to lack of awareness of existing tourism product however research shows that lower product offer in Corangamite Shire than elsewhere in the Great Ocean Road Region is a key contributor to this.

VISITOR DEMAND FOR TOURISM PRODUCT

The primary visitor survey undertaken as part of this study has identified a range of opportunities for product and accommodation development to meet visitor demand. This is based on actual accommodation and activities undertaken and compared to preferred accommodation and activities by visitors.

The primary visitor research shows that the focus of tourist visitation to Corangamite Shire is along the Great Ocean Road. This area includes the two main attractors for visitation: touring and the Twelve Apostles. The focus on tourism activity in this area combined with visitor preferences for accommodation characteristics including “close to the ocean”, “ocean views” or “rural setting” shows that the Great Ocean Road area is the key opportunity for tourism product and accommodation development based on existing and potential visitor demand.

Three quarters of visitors to Corangamite Shire have used a Visitor Information Centre (VIC) on their trip; this highlights the demand for a dedicated VIC within the proposed Great Ocean Road Interpretive Centre. This VIC could increase visitation to the Centre as well as contribute to the dispersal of visitors.

New accommodation development in the southern part of Corangamite Shire should consider the following attributes based on visitor preferences as identified by a recent survey of visitors to Corangamite Shire in 2010:

- Views of either the coast or rural setting;
- Be in close proximity to the coast;
- Be in close proximity to an existing township;
- Provide facilities directed to adult couples and large family/friendship groups.

The key accommodation gaps based on accommodation preferences and actual accommodation used are B&B's and Resort accommodation. If these were to fulfil the prerequisites above, there is likely to be existing demand for these facilities. There is also likely to be continued steady demand for self contained accommodation in the Shire.

The reasons why visitors chose not to stay overnight including “not enough things to do and see” highlights great potential to convert the existing daytrip visitor base to stay overnight, through provision of targeted activities, attractions and accommodation and further promotion of the area for overnight stay.

TOURISM PRODUCT

A review of tourism product in Corangamite Shire highlights that the majority of product is located south of the Princes Highway.

Understanding the location of existing tourism nodes is important for identifying areas which are suitable for further tourism development in order to maximize efficiencies in joint marketing initiatives by business, labour pools and infrastructure (roads, signage, sewer, water etc) as well as to improve the visitor experience through provision of choice in activities, attractions, accommodation and dining.

The nodes with the highest concentration of tourism product are Camperdown and the Great Ocean Road area which encompasses the Port Campbell Township, Port Campbell National Park, Princetown and Peterborough. The coastal hinterland area including Timboon is also a developing tourism node.

The primary node for tourism development is unquestionably the Great Ocean Road area which incorporates Port Campbell National Park, the iconic Twelve Apostles and unparalleled coastal scenery.

Natural attractions remain the key type of tourism product in Corangamite Shire with the coastal attractions of Port Campbell National Park, the coastal hinterland's remnant forests and the volcanic lakes and volcanic geology to the north of the Shire.

Manmade tourism product such as food and wine product and attractions are limited in Corangamite Shire, and provide opportunity for future development. Further development of activities that engage the visitor will assist in increasing the "length of stay" and "yield" from visitors.

The development of product which enhances the visitor experience is essential in order to ensure that Corangamite Shire remains competitive with other areas that have iconic product (E.g.: the Penguin Parade and Sovereign Hill) which focus on visitor experience rather than general sightseeing.

Corangamite Shire is well positioned to expand its eco-tourism and nature based tourism activities by building on the pristine and iconic natural attractions. New public sector initiatives include the Crater to Coast Trail, a world class interpretive centre at Port Campbell National Park and the Great Ocean Walk. Building on this there is opportunity for private sector investment in nature based tourism product such as wildlife tours (penguins), guided walks, education and other soft adventure activities.

SOUTHERN CORANGAMITE SHIRE TOURISM DEVELOPMENT OPPORTUNITIES

In summary opportunities for tourism product development in the south of the Shire include:

- Local produce, food and wine. Local produce and wineries in the coastal hinterland - Timboon and surrounds;
- Nature based activities which encourage experience of the natural attractions, e.g.: Eco tours: Fairy Penguin tours, boat charters, guided walks and interpretation;
- Retail activities - greater tourist retail mix in the townships of Port Campbell and Timboon for tourism;
- Geothermal spa and wellness centre. Building on the geothermal water in Port Campbell and potentially in the broader region.

NORTHERN CORANGAMITE SHIRE TOURISM DEVELOPMENT OPPORTUNITIES

Opportunities for tourism product in the north of Corangamite Shire include:

- Events: Water skiing, sailing, fishing competitions at the volcanic lakes;
- Arts, culture and music events in northern towns;

- Water based activities. The Volcanic lakes are renowned for high quality fishing, infrastructure and services to support this industry need further development. Sailing and boating are also development opportunities at these lakes;
- Education. There are a range of educational opportunities in the north of Corangamite Shire. The north is rich in history (indigenous and pastoral) and geology (volcanoes, etc). These are themes which can be further developed for education purposes;
- Dining and food. There is opportunity for better quality dining and food retailing facilities in towns in the northern Corangamite Shire.

ACCOMMODATION

There are 753 guest rooms and 1,575 bedspaces in accommodation establishments in Corangamite Shire. Port Campbell has the greatest number and the largest variety of tourist accommodation establishments compared to the remainder of Corangamite Shire however most of these are small scale. The current strength in the provision of accommodation in the Shire is in Motels and Self Contained accommodation.

Demand data suggests that the areas with the greatest demand for tourist accommodation are those in the southern part of Corangamite Shire, in particular coastal areas and the coastal hinterland. This is supported by research which suggests that the Port Campbell National Park attracts over 2 million visitors annually - over three quarters of all visitors to the Corangamite Shire. State-wide data from the Australian Bureau of Statistics highlights that with increased supply of rooms, occupancy levels have remained consistent over time. This adds to the argument that whilst accommodation establishments are operating at moderate occupancy levels, an increase in supply of targeted and quality accommodation can attract new overnight visitors to Corangamite Shire.

SOUTHERN CORANGAMITE SHIRE ACCOMMODATION OPPORTUNITIES

Based on the visitor markets, the initial opportunities for accommodation development include:

- Large high quality 4.5-5 star internationally ready accommodation along the Great Ocean Road: within close proximity to Port Campbell National Park. This would be targeted towards high yield independent travellers and small tour groups.
- Boutique high quality accommodation in the Coastal Hinterland (Timboon and surrounds) (B&BS, Self Contained);
- Large 4 star accommodation such as an integrated resort facility along the coast (incorporating a Tourist Park, Self Contained Accommodation, Bistro/Dining, Bar, recreation facilities). This would be targeted to large coach groups, the touring market and family groups.
- Walker accommodation in various locations which meets the demand from the Great Ocean Walk. This includes a range of accommodation types which meet the various market segments (self contained cabins, fixed tent camp sites, backpacker and 5 star fully catered accommodation).

NORTHERN CORANGAMITE SHIRE ACCOMMODATION OPPORTUNITIES

- Large 4-4.5 star accommodation facility in Camperdown to meet the needs of the business market.
- Tourist Parks and casual caravan/camping grounds in the smaller northern towns targeted at the touring market (E.g.: Skipton).
- Self contained accommodation and B&Bs in proximity to some of the key northern natural attractions. (e.g.: Lake Purrumbete).

PLANNING FRAMEWORK

Whilst the supply and demand analysis for accommodation identifies a number of opportunities for accommodation development in Corangamite Shire, a review of the planning framework has highlighted potential barriers to investment in tourism development.

Firstly, the key coastal township of Port Campbell has limited opportunities for a large integrated resort type accommodation establishment due to constraints to township growth and the limited supply of land zoned to accommodate resort accommodation. Furthermore, a Design and Development Overlay specifies a number of design directions which seek to minimise scale, height and footprints for new buildings. These guidelines are not compatible with large resort development, particularly when there is limited urban land for development.

Secondly, the Farming Zone and Rural Conservation Zones in the rural areas of the Shire place significant limitations on tourism use in the Corangamite Shire. In particular, the limitations on tourism uses in the Farming Zone include:

- Prohibition on accommodation, other than a Bed and Breakfast and Host Farm, unless used in conjunction with agriculture, outdoor recreation, rural industry or winery;
- Prohibition on retail sales, other than primary produce sales (which only allows sale of unprocessed produce grown on the property or adjoining property).

CONCLUSION

A number of tourism development opportunities have been identified in this report. The coastal areas of Corangamite Shire provide demand for tourist facilities of a much larger scale and capacity than areas in the north of Corangamite Shire. Key opportunities for tourism development in the coastal areas of Corangamite Shire include an integrated resort, walker accommodation and internationally branded accommodation as well as nature based tourism activities, geothermal, wellness and local produce.

In the northern areas of Corangamite Shire there is unlikely to be great demand for large scale tourist facilities however opportunities include self contained accommodation, tourist park accommodation, water based activities and events on the Volcanic lakes, outdoor education facilities and food, dining and local produce.

Review of the planning framework and capacity of the key tourist towns such as Port Campbell, Princetown and Timboon in the south of the Shire highlight very little opportunity for tourism development within existing urban land. In Port Campbell there are only two sites which can accommodate tourism product of any scale. A permit exists for a hotel on one of these sites, whilst the other has been earmarked for future tourism development. An integrated resort, walker accommodation and other wilderness/ nature based accommodation cannot be accommodated within the existing townships. Rural land is required to accommodate these facilities.

A review of rural zones highlights that existing rural zones including the Farming Zone and Rural Conservation Zone do not support these land uses. Therefore rezoning of specific sites in the rural areas to a zone which facilitates tourism development is required.

In the north of the Shire, most townships can generally support the tourism development opportunities identified, particularly accommodation and tourist retail and dining. Many of these activities should be located within the core commercial precincts of Camperdown, Terang, Derrinallum and Skipton, through redevelopment of underutilised sites. There is however some requirement to identify rural land to

accommodate tourism development in Timboon, around Lake Purrumbete and around Skipton, in order to link to the natural settings and attractions of these locations.

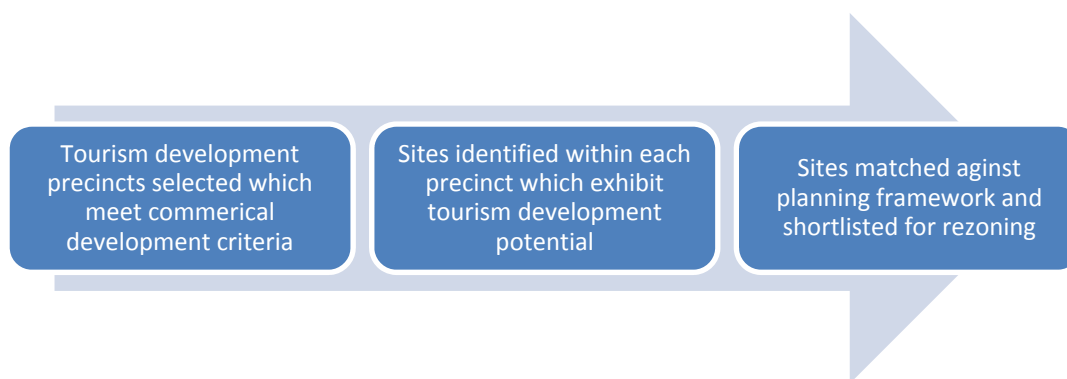
In addition land in close proximity to the coast is also required to be rezoned to support tourism development as currently there is very little development opportunity due to Farming Zone restrictions and limitations for development within existing coastal townships. These sites need to be identified with regard to commercial development criteria and also assessed against the planning framework.

PART B: IMPLEMENTATION

APPROACH

In order to implement the tourism opportunities identified above within the rural areas of Corangamite Shire a number of precincts have been reviewed and sites identified for rezoning to support tourism development.

The selection of sites for rezoning involved a three stage process as identified below. Firstly precincts were identified through an assessment of commercial development criteria, secondly sites within each precinct which exhibited tourism development potential were identified and thirdly selected sites were matched against the planning framework to shortlist specific sites for rezoning. An overview of assessment criteria is included in Part B of this report.



TOURISM PRECINCTS

The following tourism precincts were identified through consideration of commercial development criteria. These precincts have been identified for their tourism strength and potential for tourism development.

Northern Corangamite Shire Precincts	Southern Corangamite Shire Precincts
Glenelg Highway Skipton;	Peterborough East;
Mount Widderin Caves;	Port Campbell West;
Mount Elephant, Derrinallum;	Loch Ard;
Lake Purrumbete;	Glenample;
Glenormiston College;	Kangarooobie;
Timboon;	Prinetown East;
Scotts Creek;	Moonlight Head.
Camp Corriemungle;	

SHORTLISTED SITES

35 specific sites within each of the identified precincts above were assessed against the planning framework.

Based on the above assessments and through consideration of the tourism opportunities identified in Part A, 25 sites have been recommended for rezoning. These sites equate to 1,662 ha of land, only 0.4% of the total area of Corangamite Shire (4425km²). The rezoning of these sites provides opportunity for existing tourism businesses to expand and new tourism developments to occur.

The following table provides an overview of sites recommended for immediate rezoning for tourism development. A map is included in section 10.21 for reference.

Site Indicator	Precinct Name	Current Zone	Recommended Zone	Tourism Opportunity
1	Glenelg Highway Skipton	Farming Zone	Rural Activity Zone	Camping and caravan park
3	Mount Elephant	Farming Zone	Special Use Zone	Food and drink premises (other than Hotel and Tavern), Interpretation centre
4a	Lake Purrumbete	Farming Zone	Rural Activity Zone	Function centre, Group accommodation, Motel, Restaurant, Tavern
5	Glenormiston	Farming Zone	Special Use Zone	Education centre, Function centre, Residential building
6a	Timboon	Farming Zone	Rural Activity Zone	Convenience shop, Restaurant
6b	Timboon	Farming Zone	Rural Activity Zone	Camping and caravan park, Group accommodation, Residential hotel
7	Scotts Creek	Farming Zone	Rural Activity Zone	Convenience shop, Group accommodation, Restaurant, Tavern
8	Camp Coorimungle	Farming Zone	Rural Activity Zone	Camping and caravan park, Group accommodation
9	Peterborough East	Rural Conservation Zone	Special Use Zone	Airport/ group accommodation, Heliport
10	Port Campbell West	Rural Conservation Zone	Special Use Zone	Camping and caravan park, Group accommodation, Host farm, Residential hotel
11c	Loch Ard	Rural Conservation Zone	Rural Activity Zone	Residential Hotel
12	Glenample	Rural Conservation Zone	Rural Activity Zone	Camping and caravan park, Interpretation centre, Residential hotel, Restaurant
13a	Kangarooobie	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Group accommodation, Residential hotel
13b	Kangarooobie	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Group accommodation, Residential hotel
13d	Kangarooobie	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Group accommodation, Residential hotel
14b	Prinetown East	Rural Conservation Zone	Rural Activity Zone	Backpackers' lodge, Group accommodation
15a	Moonlight Head	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Bed and breakfast, Group accommodation, Residential hotel
15b	Moonlight Head	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Bed and breakfast, Group accommodation, Residential hotel
15c	Moonlight Head	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Bed and breakfast, Group accommodation, Residential hotel
15d	Moonlight Head	Rural Conservation Zone	Rural Activity Zone	Backpackers lodge, Bed and breakfast, Group accommodation, Residential hotel
16a	Moonlight Head	Rural Conservation Zone	Special Use Zone	Education centre, Group accommodation, Residential college
16b	Moonlight Head	Rural Conservation Zone	Special Use Zone	Education centre, Group accommodation, Residential college
16c	Moonlight Head	Rural Conservation Zone	Rural Activity Zone	Backpackers' lodge, Bed and breakfast, Group accommodation, Residential hotel
16e	Moonlight Head	Rural Conservation Zone	Rural Activity Zone	Backpackers' lodge, Bed and breakfast, Group accommodation, Residential hotel

1. INTRODUCTION

1.1. BACKGROUND

PROJECT DRIVERS

Urban Enterprise was appointed by Corangamite Shire to undertake a Tourism Opportunities Study in response to the following drivers:

- The Corangamite Shire contains significant natural attractions, but there is an inadequate supply of tourism product in the Shire, particularly tourist accommodation establishments, to support these;
- Despite high tourist visitation levels, the Shire receives relatively little economic benefit;
- Tourism is one of the municipality's most significant sectors, and there is local strategic support for growing the tourism sector;
- Recent State and regional strategies provide policy support for tourism developments that complement the natural attractions along the Great Ocean Road and the surrounding areas;
- Many previous attempts at tourism development in the area have failed, resulting in the need for a specific and detailed study to identify opportunities and the strategic support necessary to attract investment.

PROJECT AIMS

The key aims of this study are to:

- Identify the supply, quality and gaps in existing accommodation and tourism product in the Shire
- Understand why previous tourism developments have not proceeded;
- Understand the strategic policy framework for tourism and planning in the Shire;
- Identify visitor markets and demand for tourism product and accommodation;
- Identify the barriers to tourism development in Corangamite Shire and recommendations to remove these barriers and facilitate development including a prospectus for tourism development and amendments to the planning scheme where required.

1.2. REPORT FORMAT

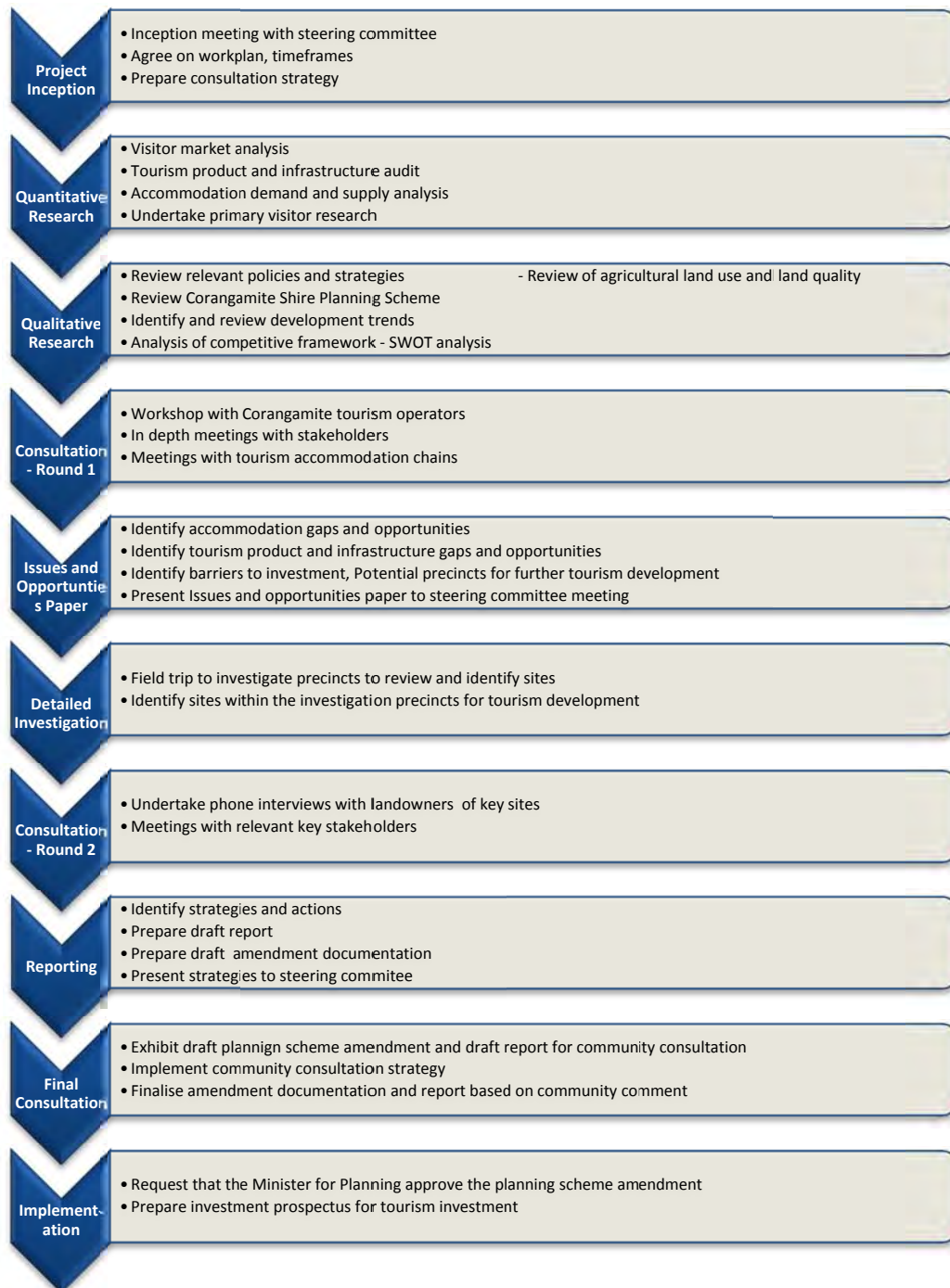
The report is presented in two sections:

- Part A: Tourism Opportunities. The purpose of this section is to identify tourism product and accommodation development opportunities in Corangamite Shire that meet policy directions, visiting and potential market segments and projected need. Furthermore Part A examines the impact of Rural Zones on tourism development in the Shire and whether the opportunities will be supported by appropriate planning policy.
- Part B: Rural Tourism Development Site Selection. This section identifies precincts and sites in the rural areas of Corangamite Shire which may be suitable for tourism

development, based on commercial development principals and assessed against the Victorian Planning Framework.

1.3. APPROACH

The following methodology has been applied to the study, with the aim to complete the project within a one year timeframe. The study commenced in December 2009.



PART A TOURISM OPPORTUNITIES



2. STRATEGIC POLICY CONTEXT FOR TOURISM DEVELOPMENT

2.1. INTRODUCTION

This section outlines the strategic policy context relevant to the use and development of land for tourism purposes. The policy context provides a framework for this study to build upon and ensures that the study draws on existing initiatives and matches with existing strategies and policy in the State, regional and local contexts.

2.2. REGIONAL CONTEXT

2.2.1. GREAT SOUTH COAST REGIONAL STRATEGIC PLAN 2010

The Great South Coast Regional Strategic Plan highlights a range of economic development initiatives for the region, in particular for developing a “broader and greater yield from Tourism”.

Strategic policy support has been provided for the following initiatives relevant to Corangamite Shire:

- Increase multiple night stays by international visitors to the Twelve Apostles.
- Develop nature based tourism products including the Loch Ard interpretive centre;
- Identify, develop and promote inland and private tourism products and associated connecting infrastructure;
- Better integrate nature based and Indigenous tourism products into State, national and international marketing structures;
- Ensure tourism planning protects natural assets from disturbance and degradation;
- Build tourist attractions in smaller towns by investing in arts, heritage and cultural events.

2.2.2. GREAT OCEAN ROAD REGION LAND USE AND TRANSPORT STRATEGY 2004

The Great Ocean Road extends between Torquay to the east of Warrnambool and north to the Princes Highway. The study provides a long term strategy that manages growth and change to the area and recommends infrastructure improvements to support this. The study is of particular relevance given the Great Ocean Road’s key icon, the Twelve Apostles is within Corangamite Shire.

Key directions for consideration by Corangamite Shire include:

1. **Protect landscape and care for the environment.** Tourism in Corangamite Shire is highly dependent on the quality of the natural environment, therefore, any tourism development needs to be developed in an environmentally sensitive manner.

2. **Manage growth of towns.** The character of small towns in Corangamite Shire should not be compromised by inappropriate urban growth that does not complement the character of the area.
3. **Improve the management of access and transport.** The poor quality of signage and roads in the Corangamite Shire Hinterland are a hindrance to visitors. Traffic flow and touring routes in the Shire could be better managed to improve visitor access.
4. **Encourage sustainable tourism and resource use.** An ecotourism resort would encourage and promote sustainable tourism and resource use. Since the natural environment is of such high importance to the local tourism industry, it is vital that sustainable tourism takes place.

The report identifies that the safety of the north - south route between Port Campbell and Princess Highway West needs to be improved. Camperdown, Terang, Cobden and Timboon have all been identified as townships where population growth and urban development can best be accommodated. While Peterborough, Port Campbell and Princetown are all listed to have their coastal town character respected by limiting urban development.

2.2.3. REGIONAL TOURISM ACTION PLAN 2009–2012

The Regional Tourism Action Plan was prepared by Tourism Victoria and provides an outline for tourism development in Regional Victoria. The plan identifies a number of areas in which state wide initiatives can be actioned and outlines a number of priority projects and funding that will be implemented in the future.

The report asserts that the Great Ocean Road's primary tourism product strength is nature based tourism and identifies the spa and wellbeing market as emerging. The relevant investments in infrastructure that have been recommended include:

- Development of nature based tourism infrastructure including the Great Ocean Walk. The Great Ocean Walk runs for 100km from Apollo Bay and terminating in close proximity to the Twelve Apostles. This presents an opportunity for the area to capitalise on these arrivals and promote the nature based tourism industry in Corangamite Shire.
- Geothermal bathhouse developments. There may be opportunities for a geothermal bathhouse development to be accommodated in Corangamite Shire. The region has sufficient geothermal waters to warrant such a venture.
- Creation of the Great Ocean Road Interpretive Centre. A large high quality interpretive centre is currently being scoped by Parks Victoria.

2.2.4. GREAT SOUTH COAST SUSTAINABLE INVESTMENT AND DEVELOPMENT SNAPSHOT 2008

SED Consulting completed the Great South Coast Investment and Development Framework in 2008. The Great South Coast is located in the South West of Victoria and includes the municipalities of Colac-Otway, Corangamite, Glenelg, Moyne, Southern Grampians and Warrnambool City. The Sustainable Investment and Development Framework provides an overview of investment and development in the region.

In 2008 there were a total of fourteen major investment and development projects in Corangamite Shire, however only one had commenced with nine awaiting planning approval.

Corangamite was the only Shire in the Great South Coast Region to experience negative population growth (-0.3%). However the Shire has the lowest level of unemployment (2.4%) when

compared with the remainder of the Great South Coast Region. The region and in particular Corangamite Shire is currently suffering from a skills shortage and there are a number of occupations that are unable to be filled. This shortage may affect the tourism industry as cleaners, kitchen hands, sales assistants, receptionists, waiters and chefs are among the tourism related occupations needed in the region.

The report identifies two \$30 million hotel complexes to be built in Corangamite which will help to boost tourism in the Shire significantly.

2.3. STATE STRATEGIC PLANS AND POLICY

2.3.1. THE VALUE OF PARKS – PORT CAMPBELL, GRAMPPIANS, WILSON PROMONTORY

The Value of Parks report was undertaken by Parks Victoria in 2005. The report asserts that Port Campbell National Park has a total economic benefit to Victoria of \$190.4 million. Parks Victoria spends a total of \$3.1 million each year on park management services. Port Campbell National Park provides 51 state and 25 regional park management related jobs and 1,775 regional and 2,536 state, tourism and hospitality jobs.

2.3.2. VICTORIAN TRAILS STRATEGY 2005–2010

One of the key development opportunities for Corangamite Shire is the further development of trails such as the Great Ocean Walk and other rail trails.

The Victorian Trails Strategy was developed by the Victorian Trails Coordinating Committee in 2004. The document aims to guide trail development in Victoria with a focus on trail management, marketing and research.

The plan provides a list of actions to help improve Victoria's Trail Network. The Great Ocean Walk is highlighted as a key project for Victoria. It has the opportunity to become Victoria's premier walk due to its spectacular natural scenery. Victoria currently lacks the positioning that states such as Tasmania have when it comes to overnight walks. There are very few overnight walks not requiring a tent in Victoria. Upgrading the trail to include quality accommodation options will improve it significantly.

Given that the Great Ocean Walk concludes at the Twelve Apostles there is opportunity to develop accommodation specific to this market in Port Campbell, Moonlight Head and Princetown or land adjoining the trail.

2.3.3. VICTORIA'S GEOTHERMAL AND NATURAL MINERAL WATER TOURISM INVESTMENT OPPORTUNITIES

The Victorian Geothermal and Natural Mineral Water Tourism Investment Opportunities paper was produced by Tourism Victoria in September 2007. The report provides direction on developing the mineral spring spa industry in Victoria. Victoria's market share of Australian domestic spa visitors is the third largest in Victoria attracting 27% of total visitors.

The Great Ocean Road Region received 5% of national spa visitors and 18% of Victorian domestic spa visitors for the year ending June 2006. A geothermal resort hotel has recently been completed at Warrnambool. The visitor market for spa tourism is expanding and there is increasing opportunities for more facilities to open.

Opportunities for a spa development in Corangamite Shire will be explored further in this study.

2.3.4. ENVIRONMENTALLY SUSTAINABLE TOURISM STRATEGIC PLAN 2009–2012

The Environmentally Sustainable Tourism Strategic Plan was produced by Tourism Victoria. It aims to improve sustainable practices in the tourism industry. Sustainable tourism can be defined as “tourism that delivers positive economic, social and environmental outcomes with consideration to the needs of the visitor, industry, community and environment”.

The plan acknowledges that the Port Campbell National Park has the highest proportion of international visitors (31.3%), and second highest proportion of visitors from interstate (34.9%) when compared to key national parks and alpine reports in Victoria. The Park has the second highest number of total visitor days (1,955,025) behind the Mornington Peninsula National Park.

The large number of visitors to Port Campbell National Park can pose issues for the sustainability values of the area. This highlights opportunity for the area to aim to increase length of stay and visitor yield rather than promote mass tourism.

2.3.5. VICTORIA’S NATURE BASED TOURISM STRATEGY

Victoria’s Nature Based Tourism Strategy was undertaken by Parks Victoria, Tourism Victoria and the Department of Sustainability and Environment. The policy’s goal is that “Victoria will be recognised as the leading sustainable nature based tourism destination in Australia renowned for its diverse and accessible natural attractions”. Of importance to this study is the objective to develop authentic, memorable experiences. The strategy specifically references developing a nationally significant precinct and interpretive centre at Port Campbell National Park. There is opportunity for Corangamite Shire to build on this concept of authentic and memorable experiences, delivered through private investment opportunities.

2.3.6. VICTORIAN COASTAL STRATEGY 2008

A large part of Corangamite Shire is located along the Great Ocean Road. The Victorian Coastal Strategy provides critical policy direction for development in coastal areas.

The Victorian Coastal Strategy states that, “clear planning principles are required to achieve coastal policy objectives and increase regional tourism investment in the right locations within non-urban areas.”

Coastal Spaces 2006 suggests that these principles could include:

- The need to provide high quality visitor/tourist accommodation which responds to a regional tourism product strength, outlines the desired visitor experience to be achieved and demonstrates consistency with regional tourism strategies;
- The design of a development should respond to these tourism needs and seek to minimise overall impact by being subordinate to the visual and environmental qualities of the locality and minimising the overall footprint of the development;
- The design of accommodation should prevent conversion to permanent residential occupation;
- The need to provide for an appropriate scale and intensity of use and development to manage the provision of services such as water and sewerage.

The Victorian Coastal Strategy also seeks to discourage linear and isolated development proliferation along the coastal edge and major transport routes and within rural landscapes.

The Victorian Coastal Strategy provides policy support for appropriate tourism accommodation development in coastal areas that meets the demands of visitors and links to product strengths.

2.4. LOCAL STRATEGIC PLANS AND POLICY

2.4.1. CORANGAMITE ECONOMIC DEVELOPMENT STRATEGY

The Corangamite Economic Development Strategy was released in January 2007. The plan outlines key issues and opportunities that may influence Council's ability to increase levels of sustainable development. The report also includes an action plan to meet objectives outlined in the strategy.

A key goal outlined in the strategy is to "improve the economic contribution of tourism by creating new attractions and trails, improving visitation and yield".

Facilities constructed for tourists (e.g. cafés, restaurants, recreational facilities) can improve the quality of life of local residents and therefore attract additional residents to relocate to these towns.

Corangamite needs to extend the length of stay of visitors and encourage a higher level of expenditure. This will require development of new attractions and experiences to meet the needs of higher yield market segments.

Although the Twelve Apostles are a significant tourist drawcard, very few tourists continue on through the Shire as attractions are generally small and are only of local and specialist interest. There is a strong need for a high quality interpretation centre in Port Campbell National Park that would provide visitors with another reason for visiting the region and staying longer.

Overnight visitors provide the largest economic contribution to the Shire due to their expenditure on accommodation and their increased potential to spend money on various goods and services.

The Timboon Railway Distillery has been recently completed and is anecdotal evidence suggests that it is trading well. This provides an example of product aimed towards higher yield markets.

The report states that there has been significant support for a Volcanos Discovery Trail. The interpretation centre for this trail would ideally be located in Camperdown. This centre would increase visitation and improve the profile of the town. It would have the potential to direct visitors to other volcanic features in places such as Noorat and Derrinallum.

Other tourism opportunities identified in the strategy include the expansion of the Terang racing industry, the provision of conference facilities at the new Port Campbell hotel complex and the proposed use of Glenormiston College facilities for student leadership training which will in turn attract a number of visitors to the area.

The strategy identifies that the tourism industry is underdeveloped and highly localised. The report outlines the following objectives and strategies to rectify this.

- Ensure that world class natural attractions are matched by world-class interpretation facilities.
 - Lobby for the development of a major interpretation centre and visitor information centre at Port Campbell.

- Following discussions with the Volcanos Discovery Trail Committee, undertake a feasibility study into the development of a major interpretation centre at Camperdown.
- Develop new tourist routes and visitor nodes throughout the Shire.
 - Complete the design and implementation of a walking / cycling trail between Camperdown and Princetown via Timboon and Port Campbell.
 - Encourage investment in tourism product along this route by investing in promotional material.
 - Assist in the development of local and regional food trails in conjunction with operators.
- Assist operators to target tourism markets.
 - Work with operators and the Regional Tourism Organisation (RTO) to establish a regional conference venue guide.
 - Encourage existing businesses to join the RTO and to participate in regional marketing.

2.4.2. CORANGAMITE SHIRE TOURISM STRATEGY 2001 – 2011

In 2001, MacroPlan was commissioned by Corangamite Shire Council to undertake a tourism strategy for the Shire. The Strategy outlined a number of objectives to increase the overall tourism products and improve opportunities for local businesses and employment.

The strategy outlines the following objectives:

- Support the provision of accommodation, tourism product (attractions, natural features), infrastructure and facilities to increase length of stay and expenditure.
- Provide assistance to promote the area as a year round destination to increase tourism in the off peak periods in coastal areas.
- Use signage, brochures and improved roads to better link the Hinterland with the coast and attract visitors to the Hinterland to support initiatives to increase visitor numbers.

The report states that the majority of international tourists tend to visit both Sovereign Hill and the Twelve Apostles, with the most direct route between the two being through Corangamite Shire. This presents an opportunity for the Shire to promote touring.

The Strategy asserts that there is insufficient tourism product in Corangamite. The successful development of tourism products will primarily originate from Port Campbell. The town is strategically located to operate as a gateway from the three product areas of Corangamite. These include:

- Volcanic features of the Hinterland.
- Historic towns including Camperdown and Terang.
- The Great Ocean Road and the coastal areas of the south.

The report has identified a number of gaps in tourism product. These gaps represent opportunities for tourism development. They are as follows:

- Backpacker accommodation;

- Accommodation (the need in coastal communities is currently unmet and there is a need for high quality bed and breakfast accommodation);
- Conference centres;
- Geothermal resort;
- Enhancement of natural tourism product;
- Enhancement of natural commercial opportunities;
- Golf tourism;
- Fishing;
- Food and wine;
- Water sports;
- Caravan parks; and
- Eco - Nature Based Tourism.

2.5. KEY FINDINGS

Key messages from the policy framework for Corangamite Shire that relate to tourism development include the need to:

- Protect landscapes and care for the environment;
- Develop authentic and memorable tourism experiences;
- Facilitate viable and innovative tourism businesses;
- Provide high quality visitor/tourist accommodation which responds to a regional tourism product strength;
- Provide for an appropriate scale and intensity of use and development to manage the provision of services such as water and sewerage;
- Design accommodation which cannot be converted to permanent residential occupation;
- The design of a development that responds to tourism needs and seeks to minimise overall impact by being subordinate to the visual and environmental qualities of the locality and minimising the overall footprint of the development;
- Ensuring that world class natural attractions are matched by world-class interpretation facilities;
- Support for the provision of accommodation, tourism product (attractions, natural features), infrastructure and facilities that increase length of stay and expenditure;
- Providing assistance to promote the area as a year round destination to increase tourism in the off peak periods in coastal areas;
- Assist operators to target tourism markets;
- Develop new tourist routes and visitor nodes throughout the Shire;
- Ensure that world class natural attractions are matched by world-class interpretation facilities;

- Support the provision of accommodation, tourism product (attractions, natural features), infrastructure and facilities to increase length of stay and expenditure;
- Provide assistance to promote the area as a year round destination to increase tourism in the off peak periods in coastal areas;
- Use signage, brochures and improved roads to better link the Hinterland with the coast and attract visitors to the Hinterland to support initiatives to increase visitor numbers.

The following product development opportunities have been highlighted in literature reviewed:

NATURAL ATTRACTIONS

- Network of interpretive / nature walks e.g. Volcanic Trail, Great Ocean Road Walk, and Timboon Cobden Rail Trail;
- Further development of a range of ecotourism tours;
- Retail products which emphasise the regions unique natural assets such as locally produced arts, crafts and food;
- Water sports on volcanic lakes;
- A major interpretive centre and VIC for the Port Campbell National Park.

EVENTS

- Celebration of local recreation and culture with events based on the volcanic hinterland, history (includes maritime heritage), local produce and industry;
- Fishing championships/ water skiing;

FOOD

- Quality dining;
- Local produce;

ACCOMMODATION

- A geothermal resort development in the vicinity of the Great Ocean Road is recognised as an opportunity for attracting increased patronage during the low season;
- Niche nature based accommodation.

3. VISITOR MARKETS

3.1. INTRODUCTION

One of the key aims for this study as highlighted in the brief is to identify visitor markets and demand for tourism product. The following section outlines visitors and visitor markets to Corangamite Shire. The data has been sourced from The Tourism Forecasting Committee, Tourism Research Australia and using PAVE (Population and Visitor Estimator - Urban Enterprise).

Where possible, visitor market data for Corangamite Shire has been compared with the Great Ocean Road Region. This comparison is important for understanding how the visitor markets to Corangamite Shire may differ from those to the overall Great Ocean Road Region.

3.2. TOURISM FORECASTS

The Tourism Forecasting Committee released its 2009 Issue Two, Tourism Forecast in December 2009. This forecast is important for understanding the macro economic climate that tourism in Corangamite Shire is operating in.

INTERNATIONAL VISITATION

The Tourism Forecasting Report stated that although Australia was affected by the global financial crisis in late 2008 through to 2009, it was one of the better performing international tourist destinations. However, international tourist growth is expected to slow in 2010 as Australia will lose some of its competitive advantages including:

- An increase in strength of Australia's currency which will subsequently reduce Australia's price competitiveness;
- Price discounting on Australia's international routes is expected to diminish;
- Higher fuel prices may result in the reintroduction of fuel surcharges.

International visitor nights to Victoria are expected to increase by 14.3% (38.5 million) in 2009 which is considerably higher than the national average of 4.8%. Growth to Victoria is expected to stabilise in 2010 growing by 3.4% in 2009 and 1.6% in 2010. This growth is partly due to the large market share of visitors to Victoria from growth markets such as India and China. Conversely, Queensland, whose growth decreased by 3.1% in 2009, relies heavily on visitors from Japan which is a market that has been declining for a number of years.

Over the period 2008 to 2010, international visitors to Regional Victoria are expected to increase by 2.6% per annum.

This suggests consistent growth for visitation to Port Campbell National Park.

DOMESTIC VISITATION

Domestic visitation within Australia slowed in 2009 due to a heavy discounting of international fares. This trend has been prevalent for the past decade however domestic expenditure reached its lowest level since records began in 1998.

Australian residents are taking fewer trips each year. An average Australian took 3.9 trips per year in 1999 which decrease to 3.1 trips in 2009 and is expected to fall to 3.0 trips by 2018. However, boosted by economic recovery, domestic trips in 2010 are expected to increase by 4.0% while visitor nights will increase by 2.3%.

Domestic visitors to Regional Victoria are only expected to increase slightly to 0.1% per annum between 2008 and 2018 compared to Melbourne which is anticipating an increase of 0.8% per annum.

This implies that domestic visitation to Corangamite Shire will grow moderately over the coming years.

3.3. ESTIMATED TOURIST VISITATION

3.3.1. INTRODUCTION

This section of the report provides an overview of visitation to Corangamite Shire, utilising Urban Enterprise's PAVE model.

PAVE provides estimates on visitation to small areas by utilising a range of datasets including data from Tourism Research Australia, the Australian Bureau of Statistics and primary research undertaken by Urban Enterprise on the holiday home sector.

3.3.2. VISITATION OVERVIEW

The following table shows the estimated visitation to Corangamite Shire. An estimated 2.6 million people visit Corangamite Shire each year, including 398,685 overnight and 2,186,306 daytrip visitors.

Almost half of the overnight visitors stay in paid accommodation (such as motels and caravan parks). The remaining visitors stay in their second (holiday) home or with friends or relatives.

Daytrip visitors include people visiting primarily for holiday leisure (53% of day-trippers) and those visiting friends and relatives in the Shire (27% of day-trippers).

TABLE 1 ANNUAL VISITATION SUMMARY, CORANGAMITE SHIRE, 2009 (PAVE)

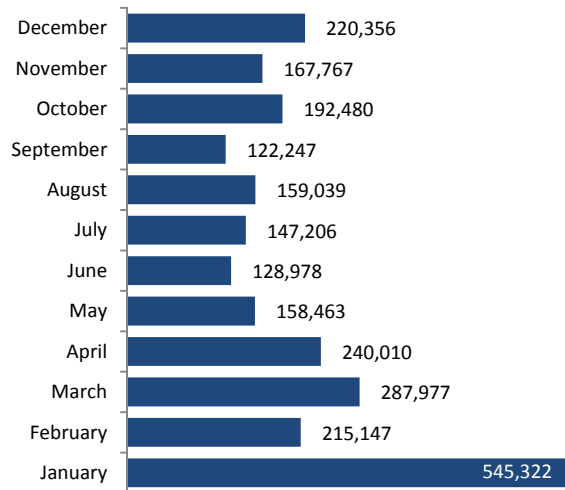
ANNUAL VISITATION	Visitor Days	Total Visitors
Number of Visitors Staying in Commercial Accommodation	262,679	183,951
Number of Visitors Staying in Caravan Parks	108,500	34,300
<i>Sub total -Number of Visitors Staying in Paid Accommodation (caravan Parks and commercial accommodation)</i>	<i>371,179</i>	<i>218,251</i>
Number of Visitors Staying in Their Second Home	242,200	74,900
Number of Visitors Staying with Friends and Relatives	211,069	105,534
Total Number of Overnight Visitors	824,448	398,685
Total Number of Daytrip Visitors	2,186,306	2,186,306
Total Number of Visitors	3,010,754	2,584,991

Source: PAVE, Urban Enterprise, 2009.

3.3.3. VISITATION BY MONTH

TOTAL VISITATION BY MONTH

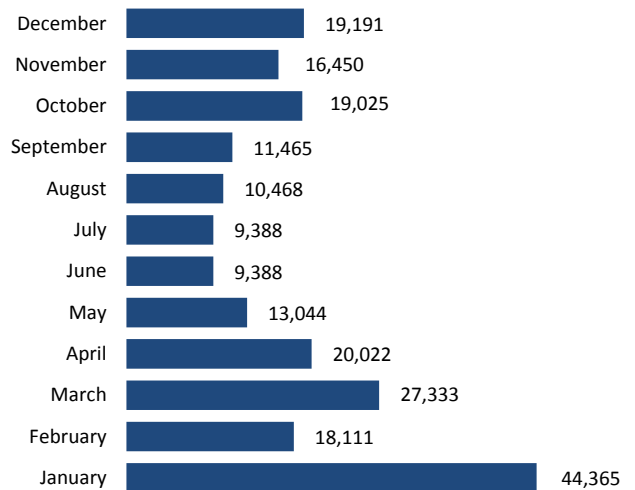
The peak visitor population occurs in January, March, April and December, which reinforces Corangamite Shire as a traditional destination with seasonal peaks and troughs aligned to school holidays and with consistent visitation throughout the year.



Source: PAVE, Urban Enterprise, 2009.

VISITORS STAYING OVERNIGHT IN COMMERCIAL ACCOMMODATION BY MONTH

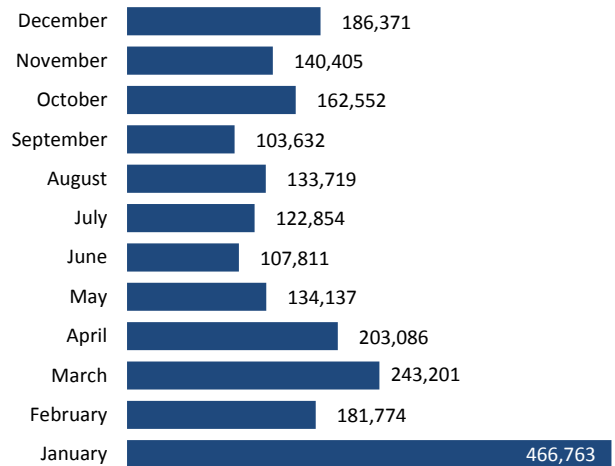
Commercial accommodation in Corangamite Shire includes Self-contained Cottages, Bed and Breakfasts (B&B's), Motels and Caravan Parks. The peak visitor population staying in commercial accommodation occurs in January, March and April, with low visitation in June and July.



Source: PAVE, Urban Enterprise, 2009.

DAYTRIP VISITORS BY MONTH

Daytrip visitation peaks in January, March and April.



Source: PAVE, Urban Enterprise, 2009.

3.4. CORANGAMITE SHIRE PRIMARY RESEARCH RESULTS

3.4.1. INTRODUCTION

To support the study Urban Enterprise was commissioned by Corangamite Shire to undertake an intercept visitor survey at key destinations in Corangamite Shire. The purpose of the primary research was to identify the following:

- Activities preferences;
- Unmet demand for activities and accommodation;
- Key visitor markets;
- Length of stay;
- Likely return visit;

The comprehensive survey results and analysis are included in the Appendix.

3.4.2. MAIN PURPOSE OF TRIP

The main purpose of visit for a one third of visitors to Corangamite Shire was to see the Twelve Apostles. In addition 30% of visitors were touring through the Shire.

This highlights the importance and focus of tourist visitation in the Shire along the Great Ocean Road.

3.4.3. VISITOR INFORMATION

Two thirds of visitors used a VIC during their trip to Corangamite Shire. (This includes VIC's on the way to the Shire).

This highlights the importance and opportunity to provide a dedicated VIC within the proposed Great Ocean Road Interpretive Centre.

3.4.4. TRAVEL PARTY

Almost half of visitors to Corangamite Shire travelled in pairs. A further 34% travelled in groups greater than four. This highlights the need for accommodation establishments to provide accommodation suited to "adult couples" and large family/ friendship groups.

3.4.5. ACCOMMODATION

The average length of stay for visitors staying in Corangamite Shire was 2 nights. One quarter of visitors who stayed in Corangamite Shire stayed one night only.

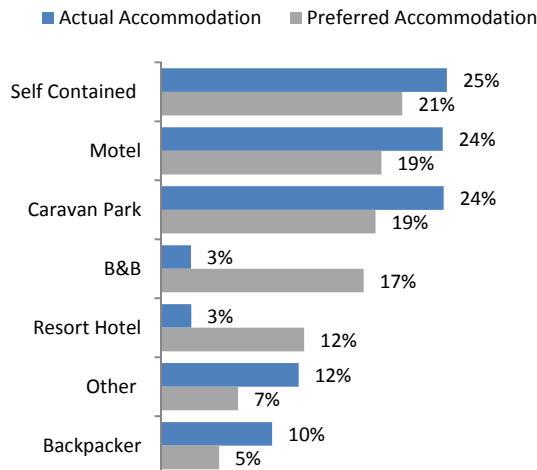
The key reasons why visitors chose to stay elsewhere include:

- Not enough to see and do;
- Time constraints;
- Not part of the original tour itinerary;
- Passing through.

The reasons why visitors chose not to stay overnight highlights great potential to convert the existing visitor base, through provision of targeted activities, attractions and accommodation and further promotion of the area for overnight stay.

ACCOMMODATION USED AND PREFERRED

Most existing visitors chose to stay in a standard motel, self contained or caravan park accommodation. The graph below shows actual accommodation used and preferred accommodation. This highlights that accommodation visitors are staying in is affected by the supply. Two types of accommodation which are underrepresented in terms of actual accommodation when compared to preferred accommodation are B&B's and Resort Hotel.



IMPORTANT CHARACTERISTICS FOR ACCOMMODATION

The most important characteristics for visitor accommodation are:

- Close to the coast;
- Value for money;
- Close to town;
- Views.

This highlights the importance of accommodation facilities to be located in and around the key tourism and townships nodes along the Great Ocean Road.

3.4.6. VISITOR ACTIVITIES

The key activities undertaken by visitors to the Corangamite Shire include:

- Visit the Twelve Apostles (87%);
- Sightseeing (72%);
- Visit coast and beach (52%);
- Self drive touring (44%);
- Walking/ hiking (39%);
- Eat out (29%);

- Visit rainforests (26%).

Activities that visitors were interested in undertaking but could not undertake include:

- Boat tours;
- Diving;
- Wineries;
- Local produce;
- Surfing/swimming/fishing.

The activities undertaken by visitors, highlights the opportunity to develop greater visitor experience around the Twelve Apostles including tours and activities associated with the water.

3.5. CORANGAMITE SHIRE VISITOR MARKETS – SECONDARY RESEARCH RESULTS

3.5.1. INTRODUCTION

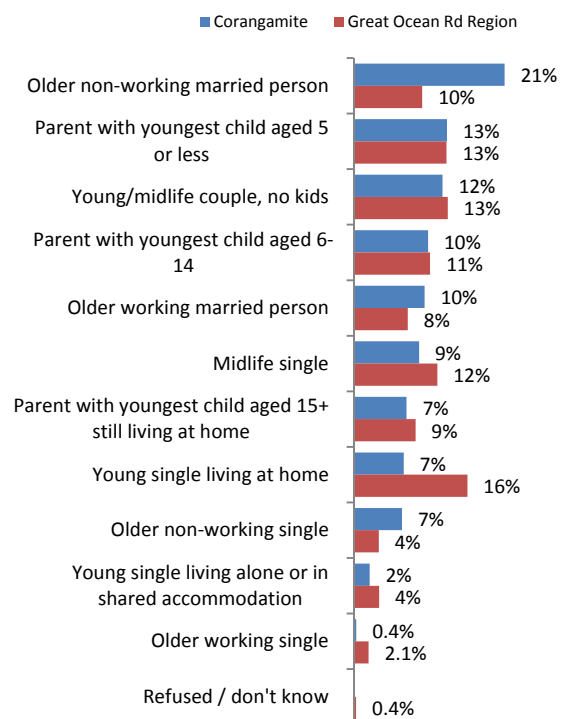
This section of the report provides a profile of visitor markets in Corangamite Shire. Comparisons have been drawn between visitors to Corangamite and the average for Great Ocean Road Region municipalities. The Great Ocean Road Region consists of the Colac-Otway, Corangamite, and Surf Coast Shires. In order to achieve an appropriate sample size, the data is a collation of the years 2004 to 2008 and sourced from the National Visitor Survey, and International Visitor Survey, Tourism Research Australia.

3.5.2. LIFECYCLE GROUPS

DAYTRIP VISITORS

The most significant lifecycle group to Corangamite Shire was those classified as an 'older non-working married person' (21%). This was followed by 'parent with youngest child aged 5 or less' (13%) and 'young / midlife couple, no kids' (12%).

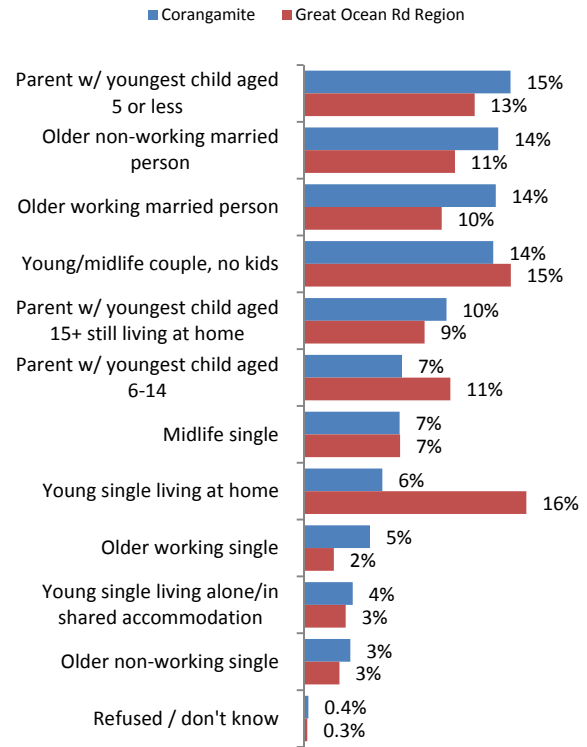
When compared with the Great Ocean Road Region, Corangamite Shire had a greater proportion of daytrip visitors who were categorised as 'older non-working married persons', 'parent with youngest child aged 5 or less' and 'young/midlife couple, no kids'.



Source: National Visitor Survey, Tourism Research Australia

OVERNIGHT VISITORS

When compared with the Great Ocean Road Region municipalities, Corangamite Shire had a greater proportion of overnight visitors who were classified as 'Parent with youngest child aged 5 or less' (15%), 'Older non-working married person' (14%), and 'Older working married person' (14%).



Source: National Visitor Survey, Tourism Research Australia

3.5.3. PURPOSE OF VISIT

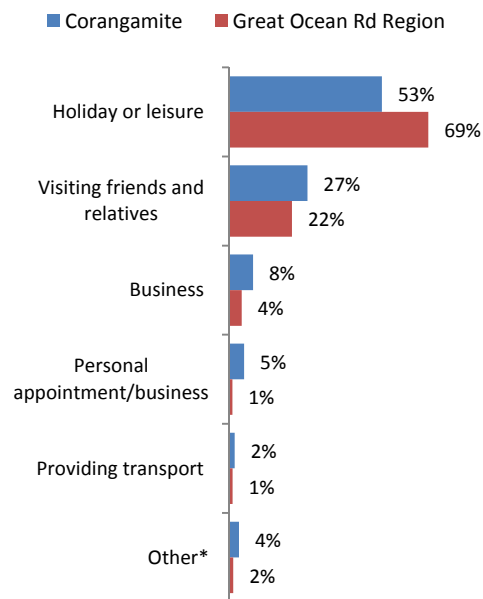
DAY TRIP VISITORS

On average, 53% of daytrip visitors visited Corangamite Shire for holiday or leisure purposes. This was followed by those visiting friends and relatives (27%).

Similarly to Corangamite Shire, the most common purpose of visit in the Great Ocean Road Region municipalities was holiday or leisure (69%), followed by visiting friends and relatives (22%).

Corangamite Shire had a significantly lower proportion of domestic daytrip visitors visiting for holiday leisure than the Great Ocean Road Region municipalities. This highlights the opportunity to strengthen the Shire's

tourism product to attract holiday leisure visitors.

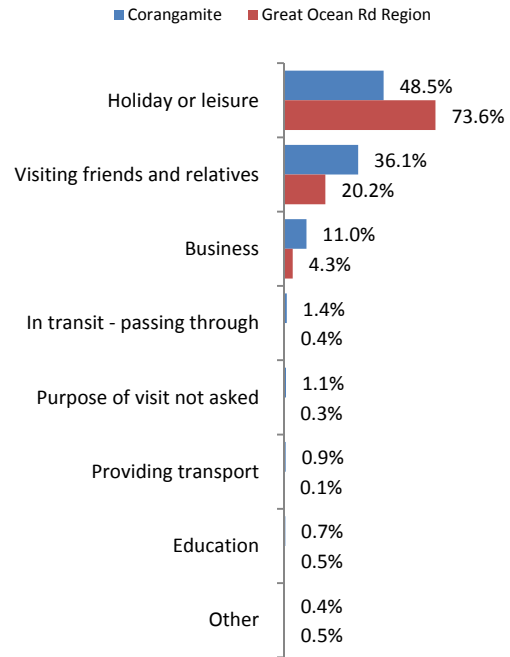


Source: National Visitor Survey, Tourism Research Australia

OVERNIGHT VISITORS

The most common purpose of visit for overnight visitors to Corangamite Shire was holiday or leisure (48%). This was followed by visiting friends and relatives (36%) and business (11%).

There was a significantly smaller proportion of overnight visitors visiting Corangamite Shire for holiday or leisure purposes (48%) when compared to the Great Ocean Road Region municipalities (74%). This confirms Corangamite Shire's relatively lower level of tourism development when compared with other municipalities in the Great Ocean Road Region.



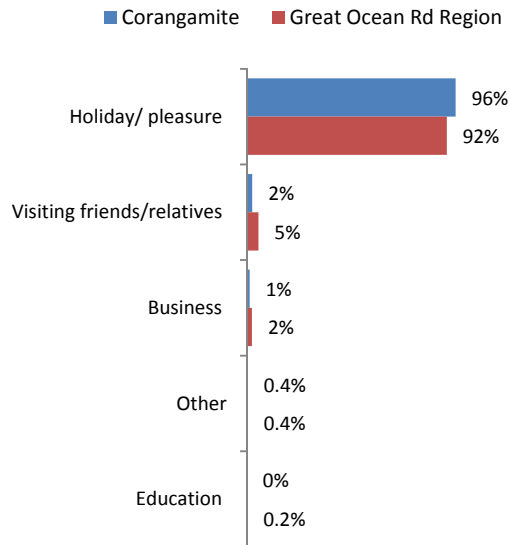
Source: National Visitor Survey, Tourism Research Australia

INTERNATIONAL VISITORS

In Corangamite Shire, the most common purpose of visit was for holiday / pleasure purposes (96%).

The majority of international visitors in Corangamite Shire (96%) and the Great Ocean Road Region (92%) had visited the regions for Holiday / pleasure purposes.

The Great Ocean Road Region municipalities had a slightly greater proportion of international visitors visiting friends / relatives (5%) than Corangamite Shire (2%).



Source: National Visitor Survey, Tourism Research Australia

3.5.4. ACTIVITIES UNDERTAKEN

DAY TRIP VISITORS

Corangamite had the highest proportion of daytrip visitors undertaking social and others related activities (86%). This was followed by outdoor or nature activities (27%).

The least common activity undertaken in Corangamite Shire was those relating to arts / heritage / festival with only 4% of the total visitors taking part.

Similarly to Corangamite Shire, the Great Ocean Road Region municipalities had the largest proportion of daytrip visitors undertaking social and others related activities (79%).

Interestingly the Corangamite Shire has a significantly lower proportion of daytrip visitors undertaking outdoor and nature activities than the Great Ocean Road Region municipalities, even though natural attractions are the Shire's key tourism product.

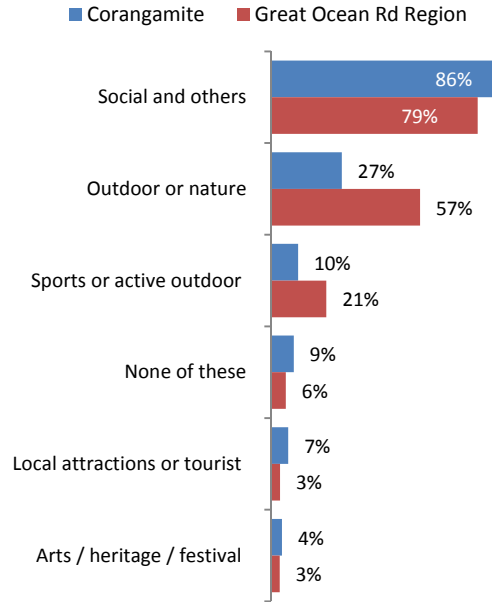
The low representation across all activities may relate to a low level of product offer or awareness of tourism product in Corangamite Shire.

INDIVIDUAL ACTIVITIES

The following table shows the 15 most popular individual activities undertaken by daytrip visitors to Corangamite Shire and the Great Ocean Road Region municipalities.

The most popular individual activity undertaken by daytrip visitors in Corangamite Shire was to eat out at restaurants (40%), followed by visiting friends and relatives (34%) and general sightseeing (33%).

One of the key areas of interest in the data presented is the relatively low level of visitors to Corangamite Shire who go the beach when compared to the Great Ocean Road Region municipalities. The beaches of Corangamite Shire are not a key destination for daytrip visitors, although many daytrip visitors would visit the coastal attractions. The low level of beach activity is likely to be due to the limited supply of accessible beaches or possibly low awareness of swimming beaches Corangamite Shire.



Source: National Visitor Survey, Tourism Research Australia

Activity	Corangamite	Great Ocean Road Region
Eat out at restaurants	40%	47%
Visit friends and relatives	34%	25%
General sight seeing	33%	27%
Pubs clubs and discos	15%	12%
Go to the beach	14%	52%
None of these	9%	6%
Go shopping	7%	17%
Visit farms	7%	1%
Bushwalking or rainforest walks	5%	6%
Play other sports	4%	3%
Surfing	3%	9%
Visit history heritage buildings sites or monuments	3%	1%
Visit national parks or State parks	3%	4%
Go fishing	3%	4%
Visit industrial tourism attractions	3%	1%

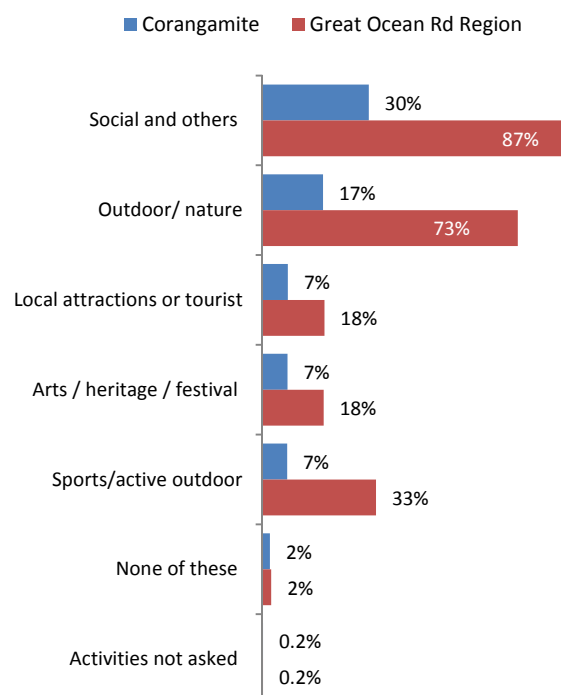
Source: National Visitor Survey, Tourism Research Australia

OVERNIGHT VISITORS

The most popular activity undertaken by overnight visitors in Corangamite Shire was social and others (30%), followed by outdoor / nature (17%).

Social and others (87%) and outdoor / nature (73%) related activities are the most prevalent activities undertaken by overnight visitors in the Great Ocean Road Region, however, Corangamite Shire experienced a greater proportion of visitors undertaking these activities (30% and 17% respectively).

The Great Ocean Road Region municipalities also had a greater proportion of visitors undertaking sports / active outdoor (33%) activities than Corangamite Shire (7%).



Source: National Visitor Survey, Tourism Research Australia

INDIVIDUAL ACTIVITIES

The table below shows the 15 most popular individual activities undertaken by overnight visitors in Corangamite Shire and the Great Ocean Road Region municipalities.

In Corangamite Shire, the most popular individual activities undertaken by overnight visitors was to eat out at restaurants (19%), visit friends and relatives (16%), general sightseeing (16%) and to go to the beach (12%).

The most common individual activities undertaken in the Great Ocean Road Region was also to go to the beach (64%), eat out at restaurants (55%), visit friends and relatives (36%) and general sightseeing (40%).

Visitors to Corangamite Shire undertook significantly less activities than those to the Great Ocean Road Region municipalities.

Of interest to note is the low level of reported visitation to national parks, it may be that visitors to The Twelve Apostles, Loch Ard Gorge and London Bridge do not acknowledge that they are visiting a National Park.

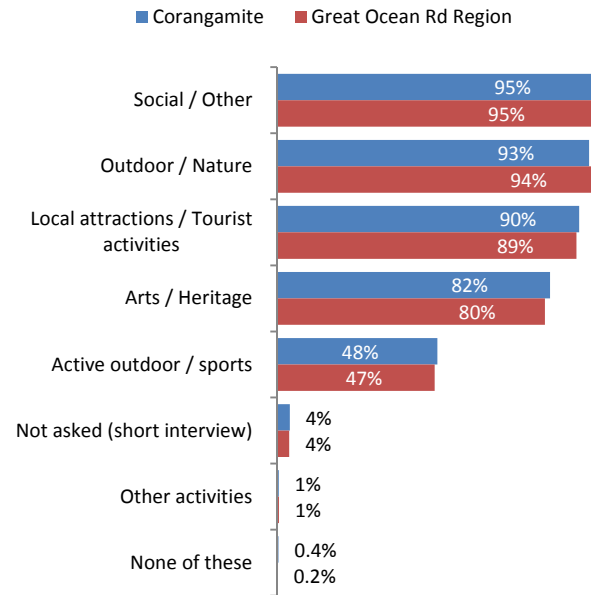
Activity	Corangamite	Great Ocean Road Region
Eat out at restaurants	19%	55%
Visit friends and relatives	16%	36%
General sight seeing	16%	40%
Go to the beach	12%	64%
Pubs clubs discos etc	9%	28%
Go shopping	8%	31%
Bushwalking or rainforest walks	7%	22%
Visit national parks or State parks	6%	17%
Visit history heritage buildings sites or monuments	5%	8%
Go on a daytrip to another place	5%	11%
Visit museums or art galleries	3%	8%
Picnics or BBQs	3%	10%
Go fishing	3%	6%
Visit farms	3%	2%
None of these	2%	2%

Source: National Visitor Survey, Tourism Research Australia

INTERNATIONAL VISITORS

The most popular activities undertaken by international visitors in Corangamite Shire were social / other (95%), outdoor / nature (93%) and visiting local attractions / tourist activities (90%).

Overseas visitors in Corangamite Shire and the Great Ocean Road Region municipalities undertook similar activities.



Source: International Visitor Survey, Tourism Research Australia

INDIVIDUAL ACTIVITIES

The table below shows the 15 most popular individual activities undertaken by overseas visitors.

Activity	Corangamite	Great Ocean Road Region
Go shopping for pleasure	85%	85%
Visit national parks / State parks	84%	82%
Go to the beach	81%	83%
Eat out / dine at a restaurants	75%	74%
Go to markets	71%	69%
Pubs, clubs, discos etc	66%	65%
Bushwalking / rainforest walks	66%	66%
Visit wildlife parks / zoos / aquariums	64%	62%
Visit botanical or other public gardens	64%	66%
Visit history / heritage buildings, sites or monuments	60%	58%
Visit museums or art galleries	58%	59%
Charter boat / cruise / ferry	53%	50%
Go on guided tours or excursions	44%	42%
Experience aboriginal art / craft and cultural displays	42%	37%
Sightseeing/looking around	41%	38%

Source: International Visitor Survey, Tourism Research Australia

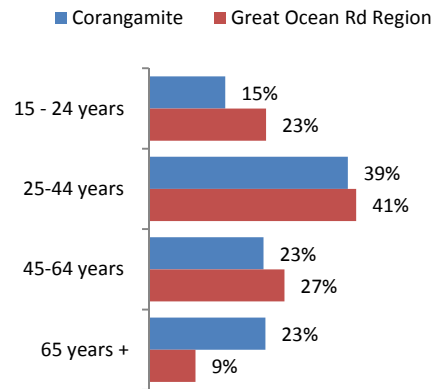
The majority of Corangamite Shire's overseas visitors undertook shopping for pleasure (85%) and visiting national parks / State parks (84%). This was followed by going to the beach (81%) and eating out / dining at restaurants (75%).

3.5.5. AGE

DAYTRIP VISITORS

Almost 40% of daytrip visitors in Corangamite were aged between 25 and 44. 23% were in the 45 - 64 age bracket while another 23% were aged over 65.

Similarly to Corangamite, the Great Ocean Road Region municipalities attracted a large proportion of daytrip visitors aged between 25 and 44 (41%) and between 45 and 64 (27%).

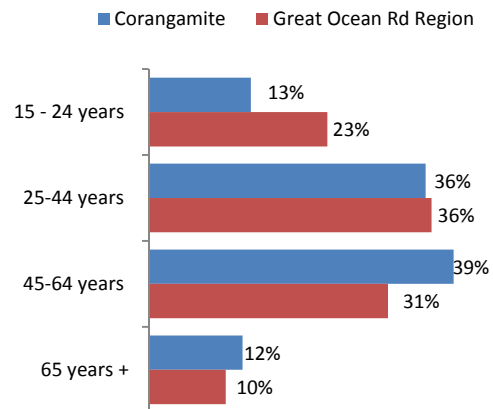


Source: National Visitor Survey, Tourism Research Australia

OVERNIGHT VISITORS

The majority of overnight visitors in Corangamite Shire were in the 25 - 44 age bracket (36%) and 45 - 64 age bracket (39%).

On average, the Great Ocean Road Region municipalities had a similar proportion of overnight visitors in the 25-44 age bracket (36%) and the 45-64 age bracket (31%) when compared to Corangamite Shire.

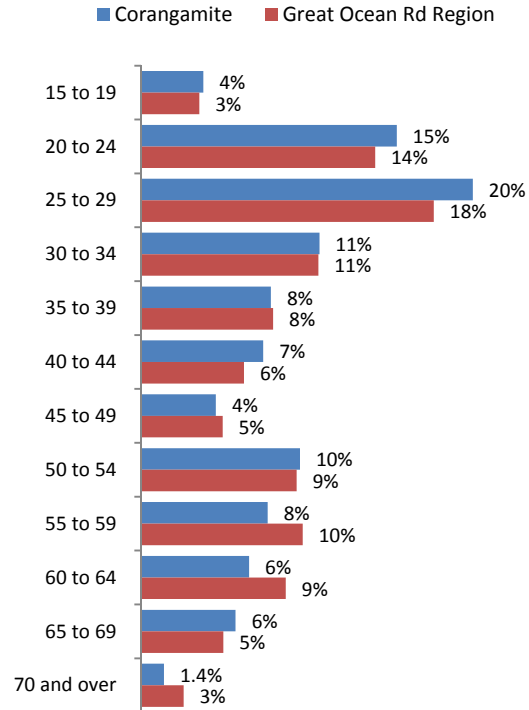


Source: National Visitor Survey, Tourism Research Australia

INTERNATIONAL VISITORS

The most populous age group in Corangamite Shire was between 25 to 29 years (20%). This was followed by between 20 to 24 years (15%), between 30 to 34 years (11%) and between 50 to 54 years (10%).

International visitors to the Great Ocean Road Region municipalities were in similar age groups as visitors to Corangamite Shire.



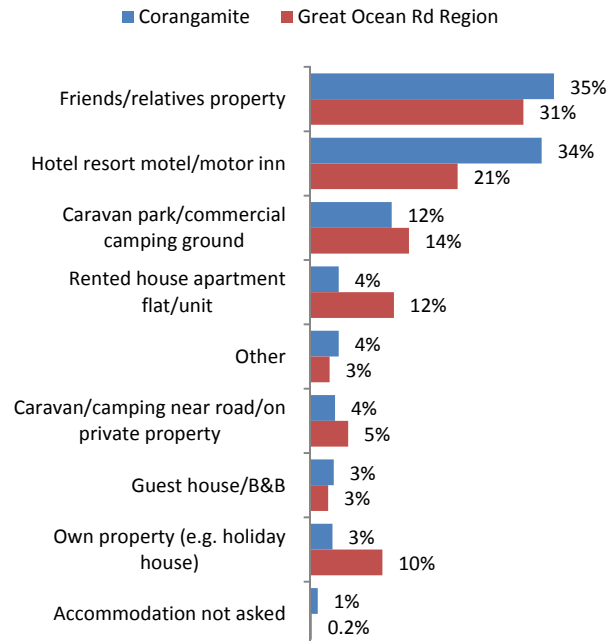
Source: International Visitor Survey, Tourism Research Australia

3.5.6. ACCOMMODATION

DOMESTIC VISITORS

In Corangamite, 35% of overnight visitors stayed at a friends / relatives property during their visits. This was followed by those who stayed in a hotel, resort, motel / motor inn (34%).

Similarly to Corangamite Shire, the most popular forms of accommodation in the Great Ocean Road Region were a friends / relatives property (31%) and a hotel, resort, motel / motor inn (21%). However, they attracted a lower proportion of total visitors than Corangamite Shire.



Source: National Visitor Survey, Tourism Research Australia

AVERAGE LENGTH OF STAY

The average length of stay was 1.95 nights in Corangamite, compared to 2.7 nights for other municipalities in the Great Ocean Road Region. This highlights the opportunity to increase visitors length of stay with targeted accommodation and a larger product offer.

Region	Length of Stay
Corangamite Shire	1.95
Great Ocean Road Region	2.7

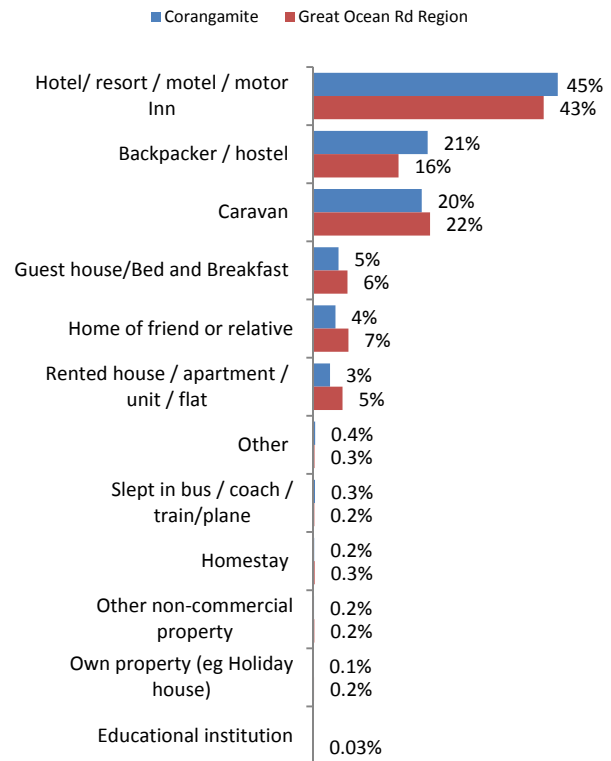
Source: National Visitor Survey, Tourism Research Australia

INTERNATIONAL

In Corangamite, the most common type of accommodation for international visitors was a hotel / resort / motel / motor inn (45%). This was followed by backpacker / hostel (21%) and caravan (20%).

Similarly to Corangamite Shire, the most common type of accommodation among international visitors in the Great Ocean Road Region was also hotel / resort / motel / motor inn (43%).

The Great Ocean Road Region had a significantly lower proportion of international visitors staying in backpacker / hostel (16%) but more visitors staying in a caravan (22%) than Corangamite Shire (21% and 20% respectively).



Source: International Visitor Survey, Tourism Research Australia

LENGTH OF STAY

AVERAGE LENGTH OF STAY

The average length of stay for overseas visitors was 1.8 nights in Corangamite Shire, and 2.3 nights in the Great Ocean Road Region.

Region	Length of Stay
Corangamite	1.8
Great Ocean Road Region	2.3

Source: International Visitor Survey, Tourism Research Australia

3.6. MARKET SEGMENTATION

Tourism Victoria has undertaken research on market segmentation for visitors to Victoria that relate to niche product. The key niche product for Corangamite Shire is Nature Based Tourism. An outline of the market segments which correspond to nature based tourism activities is provided below. This highlights the markets with the greatest development potential in Corangamite Shire.

LIFECYCLE GROUPS

The table to the right shows that nature based tourism attracts significant representation from single, no kids and family groups.

Lifecycle Group	% of Total
Single, no kids	21%
Couple, no kids	15%
Parent/ family group	37%
Older working	12%
Older not working	16%

Source: Tourism Victoria

ROY MORGAN VALUE SEGMENTS

Nature based tourism attracts the greatest level of participation from Visible Achievement (25%), Socially Aware (18%) and Traditional Family Life (15%). This is in line with findings above for lifecycle groups and also corresponds with the key market segments identified for Corangamite Shire: Young Singles and Older Married Couples.

Values Segment Victoria Australia	% of Total
Visible Achievement	26%
Socially Aware	18%
Traditional Family Life	15%
Young Optimism	11%
'Look At Me'	9%
Conventional Family Life	8%
Something Better	5%
Real Conservatism	4%
Fairer Deal	2%
Basic Needs	1%

Source: Tourism Victoria

3.7. KEY FINDINGS

VISITATION

Urban Enterprises PAVE (Population and Visitor Estimator) model confirms that Corangamite Shire attracts a large number of visitors (approximately 2.6 million visitors annually). This is comprised of around 400,000 overnight visitors and 2.2 million daytrip visitors. Research shows that the vast majority of these visitors are travelling to Corangamite Shire to visit the Port Campbell National Park. (Parks Victoria data suggests that over 2 million visitors are attracted to Port Campbell National Park annually).

This highlights that whilst Corangamite Shire attracts a large number of visitors, an overwhelming number of these are daytrippers to the Shire who only visit Port Campbell National Park.

The existing visitation patterns may provide an opportunity to convert daytrippers to overnight visitors and conversely increase visitor yield (Visitor yield relates to expenditure per person).

ANNUAL VISITATION	Visitor Days	Total Visitors
Number of Visitors Staying in Commercial Accommodation	262,679	183,951
Number of Visitors Staying in Caravan Parks	108,500	34,300
<i>Sub Total Number of Visitors Staying in Paid Accommodation (Commercial accommodation and caravan parks)</i>	371,179	218,251
Number of Visitors Staying in Their Second Home	242,200	74,900
Number of Visitors Staying with Friends and Relatives	211,069	105,534
Total Number of Overnight Visitors	824,448	398,685
Total Number of Daytrip Visitors	2,186,306	2,186,306
Total Number of Visitors	3,010,754	2,584,991

VISITOR MARKETS

Understanding the visitor market segments to Corangamite Shire is essential for identifying product and accommodation opportunities that meet market demand. This report has analysed visitors to Corangamite Shire and compared these with the Greater Ocean Road Region municipalities, using data from the National and International Visitor Survey (Tourism Research Australia).

Domestic visitor markets to the Corangamite Shire vary greatly from domestic visitors to the Great Ocean Road Region municipalities. Domestic visitors to Corangamite Shire are generally older and have a higher preference for hotel and resort accommodation than those to the Great Ocean Road Region. Domestic overnight visitors also have a shorter length of stay (1.9 nights in Corangamite Shire compared to 2.7 nights in other municipalities in the Great Ocean Road Region).

The international visitor profile of Corangamite Shire however is almost identical to that of the Greater Ocean Road Region municipalities. This highlights that international visitors are travelling through the entire region, with Corangamite Shire as one of the main stopping points, often with the Twelve Apostles as the main attraction. Whilst only 18% of visitors are staying overnight in Corangamite Shire, their length of stay is significantly shorter than for other municipalities in the Great Ocean Road Region (1.9 nights on Corangamite compared to 2.7 nights in the Great Ocean Road Region).

International visitors predominantly fall into two groups: young singles/ couples and older married couples. International visitor preferences for accommodation include hotels and resorts, backpackers and caravan parks.

Roy Morgan Segmentation of Nature Based Tourism visitors highlights that Visible Achievement, Socially Aware and Young Optimism are the key segments for this product. These three segments differ greatly in their socio-economic status and holiday style. This highlights the need for a broad range of product and accommodation types to match market demand.

Visitors to Corangamite Shire undertake significantly less activities than visitors to other municipalities in the Great Ocean Road Region. This may be due to lack of awareness of existing tourism product or lower product offer in Corangamite Shire than elsewhere in the Great Ocean Road Region.

OPPORTUNITY FOR PRODUCT DEVELOPMENT

The primary visitor survey has identified a range of opportunities for product and accommodation development to meet visitor demand. This is based on actual accommodation and activities undertaken and compared to preferred accommodation and activities by visitors.

The focus of tourist visitation to Corangamite Shire is along the Great Ocean Road. This area includes the two main attractors for visitation: touring and visiting the Twelve Apostles. The focus on tourism activity in this area combined with visitor preferences for accommodation characteristics including “close to the ocean”, “ocean views or rural setting” shows that the Great Ocean Road area is the key opportunity for tourism product and accommodation development based on existing and potential visitor demand.

Three quarters of visitors to Corangamite Shire have used a VIC on their trip, which highlights the demand for a dedicated VIC within the proposed Great Ocean Road Interpretive Centre. This VIC could increase visitation to the Centre as well as contribute to the dispersal of visitors throughout the Shire.

Large scale accommodation development in the southern part of Corangamite Shire should consider the following attributes based on visitor preferences:

- Views of either the coast or rural setting;
- Be in close proximity to the coast;
- Be in close proximity to an existing township;
- Provide facilities directed to adult couples and large family/friendship groups.

The key accommodation gaps based on accommodation preferences and actual accommodation used are B&B's and Resort accommodation. If these were to fulfil the prerequisites above, there is likely to be existing demand for these facilities.

The reasons why visitors chose not to stay overnight including “not enough things to do and see” highlights great potential to convert the existing daytrip visitor base to stay overnight, through provision of targeted activities, attractions and accommodation and further promotion of the area for overnight stay.

4. TOURISM PRODUCT

4.1. INTRODUCTION

As highlighted in the brief it was acknowledged that Corangamite Shire had limited tourism product to encourage visitors to stay longer and explore the Shire. This section reviews the supply of tourism product and benchmarks Corangamite Shire against other municipalities in the Great Ocean Road Region.

4.2. TOURISM PRODUCT REVIEW –CORANGAMITE SHIRE

LOCATION OF PRODUCT

The supply of tourism product in the Corangamite Shire is demonstrated in the following table and on the map on the following page. The majority of tourism product in the Corangamite Shire is located south of the Princes Highway.

The nodes with highest concentration of tourism product are Camperdown and the Great Ocean Road area which encompasses the Port Campbell Township, Port Campbell National Park, and Princetown.

The primary node for tourism development is unquestionably the Great Ocean Road area which incorporates the iconic Twelve Apostles and unparalleled coastal scenery.

There has been some tourism product development in the coastal hinterland in recent years in localities such as Timboon and Simpson, particularly in food and local produce.

PRODUCT STRENGTHS AND WEAKNESSES

Natural attractions remain the key type of tourism product in Corangamite Shire with the coastal attractions associated with Port Campbell National Park. The coastal hinterland's remnant forests and the volcanic lakes and volcanoes to the north of the Shire also highlight a broad range of natural attractions which can be further capitalised upon.


Whilst there is a range of other tourism product in the Shire such as local produce and visitor experiences these are limited in supply in Corangamite Shire. Further development of activities that engage the visitor will assist in increasing the "length of stay" and "yield" from visitors.


Given the level and quality of natural attractions there may be opportunity to develop tourism product which offers new experiences of these attractions such as events, tours and charters.

TABLE 2 OVERVIEW OF TOURISM PRODUCT SUPPLY IN CORANGAMITE SHIRE

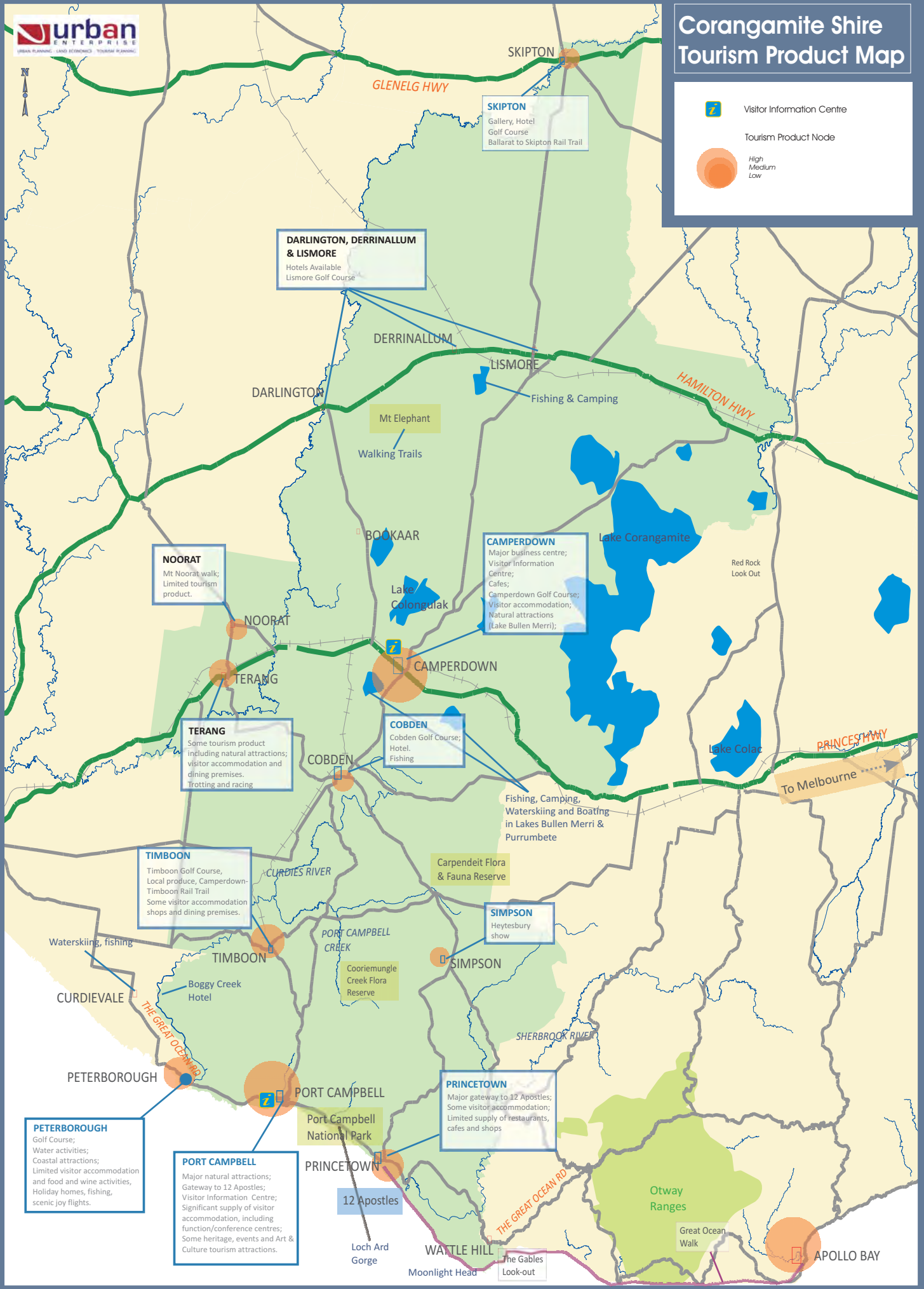
PRODUCT TYPE	DISCUSSION
Natural coastal attractions	There are 18 major coastal attractions identified in Corangamite Shire. These include the Twelve Apostles, Lock Ard Gorge, London Bridge and Bay of Islands.
Inland natural attractions	There are 9 major inland natural attractions identified including Lake Bullen Merri and Mt Elephant
Unique experiences	Corangamite Shire offers a number of unique experiences including joy flights at the Twelve Apostles and boat tours
Lakes and wetlands	There are 13 rivers and lake attractions in Corangamite Shire, many of which are suitable for a range of boating and fishing activities
Arts and culture	There are four arts and cultural attractions identified in Corangamite Shire
Events	Our product review has identified a limited supply of tourism events in the Shire, however there are a number of local markets
Function and conference	Whilst there are no prominent conference centres in Corangamite Shire there are a number of smaller venues which provide for small events
Golf	There are six golf courses in Corangamite Shire.
Historic attractions	There are a number of historical sites in Corangamite Shire that link to the early settlers of the Western Plains, these include historic buildings in Camperdown and Terang and other rural sites such as dry stone walls.
Local produce	There are 9 local produce attractions identified in Corangamite Shire, these supply local cheese, eels, meat, lavender, beer and wine
Restaurants/dining	There are over 30 local restaurants/ cafes in Corangamite Shire, predominantly in the Shires major townships

Corangamite Shire Tourism Product Map

 Visitor Information Centre

 Tourism Product Node

High
Medium
Low



4.3. COMPETITOR ANALYSIS

4.3.1. GREAT OCEAN ROAD REGION

The Great Ocean Road Tourism Region comprises a number of municipalities including Surf Coast Shire, Colac Otway Shire, Corangamite Shire, Moyne Shire and the City of Warrnambool.

It is important to understand the tourism product offer in the municipalities surrounding Corangamite Shire in order to determine whether demand for tourism product and accommodation is being met by other locations along the Great Ocean Road.

The region is diverse and whilst Corangamite Shire has the iconic natural attractions such as the Twelve Apostles, there is a significant level of tourism product in the surrounding municipalities that provides alternative options for visitors.

The table on the following page highlights the product strengths of each municipality.

The table highlights that Surf Coast Shire has a well-developed mix of tourism product across a number of product segments. It has a large range of accommodation establishments, good quality natural attractions and well developed man-made attractions and developing food and wine sector. Surf Coast's townships of Torquay, Anglesea and Lorne have become icons in themselves and contain a significant proportion of the tourism product on offer.

Colac Otway Shire whilst having fewer tourism developments than Surf Coast Shire has some high quality man made attractions that link to natural attractions (nature based tourism) such as the Otway Fly and Forrest Mountain Bike Trails. The food and wine product however is limited as is the mix of accommodation product in Colac Otway.

Both these Shires provide some intervening tourism experiences for the visitor who travels along the Great Ocean Road. However given that the key iconic attraction of the Great Ocean Road is the Twelve Apostles, which is some distance from the tourism nodes of Apollo Bay, Lorne and Anglesea there is opportunity to build local visitor experiences and accommodation in closer proximity to the Twelve Apostles (the township of Lorne which has the largest provision of higher grade group accommodation yet is almost two hours by road from the Twelve Apostles).

Warrnambool also offers some competition for Corangamite Shire in the way of provision of visitor accommodation, however the tourism product offer in Warrnambool is still in its infancy, particularly for international markets.

Moyne has a moderate level of tourism development. Its strengths lie in heritage, culture and nature based tourism. Port Fairy is the standout destination in Moyne, however this is some distance from Corangamite Shire.

TABLE 3 PRODUCT STRENGTHS IN SURF COAST, COLAC OTWAY, CORANGAMITE AND WARRNAMBOOL

	Accommodation	Natural Attractions	Man made Attractions	Food and Wine
Surf Coast Shire				
Description	Accommodation in the Surf Coast Shire predominately consists of apartments and houses for rent. There are also a number of larger accommodation establishments including branded resorts. There are a number of high quality caravan parks in the Shire.	Surf Coast Shire has a large number of natural attractions. These include: Surf beaches; Erskin Falls; Point Danger; Point Addis; Eagle Rock Marine National Park.	The Surf Coast Shire has a large number of man made attractions. These are generally centred around Lorne, Anglesea and Torquay. These include: Art galleries/ museum; Conference; Music Festivals; Golf courses; Surf culture; Shopping.	The Surf Coast Shire has a numerous cafes, restaurants and bars as well as some wineries around Torquay.
Colac Otway Shire				
	There are a large number of motels especially in Apollo Bay. Much of the accommodation available outside of Apollo Bay consists of self contained houses and apartments.	Natural attractions include: Otway National Park; Marengo's Reef; Marine National Park; Triplet Falls	Colac Otway Shire has a number of manmade attractions, these include Great Ocean Walk; Otway fly; Mountain Bike Trails; Apollo Bay Music Festival; Horse riding; Apollo Bay Market.	Colac Otway has a number of wineries however there is limited quality food and beverage businesses in the Shire.
Corangamite Shire				
	There are limited accommodation facilities in Corangamite Shire with most accommodation centred around Port Campbell. The majority is self contained. The general quality of accommodation in Corangamite Shire is of medium standard.	Corangamite has a large and varied collection of natural attractions. These natural attractions are key drawcards for visitors to the Shire Twelve Apostles National Park; Port Campbell Marine National Park; Craters and Lakes; Mt Elephant; Volcanos.	Man made attractions include: Historic Towns; Water sports; Timboon Gourmet Food Trail; Markets. Great Ocean Walk	Timboon has a number of gourmet food and beverage businesses which will increase over the coming years. The remainder of the Shire has a limited quality of food and drink establishments.

Warrnambool City				
	Warrnambool has a large number of motels available. They comprise a high proportion of accommodation stock than when compared to Corangamite, Colac Otway and Surf Coast Shires.	Fishing; Diving; Tower Hill Reserve.	Flagstaff Hill; Shipwrecked sound and light show; Art Galleries; Shopping; Horse Racing.	Warrnambool has a number of food and drink establishments however, there is not a great variety in the types of establishments
Moyne				
	The majority of tourist accommodation in Moyne is located at Port Fairy. This consists of mainly small and medium scale accommodation.	Moyne has a diverse landscape, similar to Corangamite. Its coastal attractions include ocean beaches and bird habitats.	The Port Fairy township provides the key man made attraction in Moyne. Individual attractions include museums, galleries and boutiques	The food and wine product in Moyne is in its early development.

4.3.2. OTHER ICONIC TOURISM PRODUCT IN VICTORIA

There are a number of other locations in country Victoria that compete with Port Campbell National Park in terms of attracting international and interstate visitors. Other key regional locations that are prominent destinations for international and interstate visitors in country Victoria include the Phillip Island Penguin Parade and Ballarat's Sovereign Hill.

Phillip Island and Ballarat are significantly closer to Melbourne than the Twelve Apostles, which can be argued provides a competitive advantage over the Corangamite Shire icon in terms of attracting day visitors. However the distance of the Twelve Apostles provides good reason for visitors to stay overnight in the region.

The other key area where the Twelve Apostles may fall short of Phillip Island's Penguin Parade and Ballarat's Sovereign Hill is the level of visitor engagement and experience. Both the Penguin Parade and Sovereign Hill provide a "visitor experience", it can be argued that for most visitors to the Twelve Apostles (other than those which take scenic flights) the experience is limited to sightseeing. The planned interpretive centre at Port Campbell National Park and the Great Ocean Walk will provide visitor experience additional to general sightseeing.

In order for the Twelve Apostles to remain competitive with other iconic tourism product in Victoria for both national and international markets, the visitor experience and product offer should be expanded, this will also encourage the conversion of day visitation to overnight stays.

4.4. KEY FINDINGS

A review of tourism product in Corangamite Shire highlights that the majority of product is located south of the Princes Highway.

Understanding the location of existing tourism nodes is important for identifying areas which are suitable for further tourism development in order to maximize efficiencies in joint marketing initiatives by business, labour pools and infrastructure (roads, signage, sewer, water etc) as well as to improve the visitor experience through provision of choice in activities, attractions, accommodation and dining.

The nodes with highest concentration of tourism product are Camperdown and the Great Ocean Road area which encompasses the Port Campbell Township, Port Campbell National Park,

Princetown and Peterborough. The coastal hinterland area including Timboon is also a developing tourism node.

The primary node for tourism development is unquestionably the Great Ocean Road area which incorporates Port Campbell National Park, the iconic Twelve Apostles and unparalleled coastal scenery.

Natural attractions remain the key type of tourism product in Corangamite Shire with the coastal attractions of Port Campbell National Park, the coastal hinterland's remnant forests and the volcanic lakes and topography to the north of the Shire.

Man made tourism product such as food and wine product and attractions are limited in Corangamite Shire, and provide opportunity for future development. Further development of activities that engage the visitor will assist in increasing the "length of stay" and "yield" from visitors.

The development of product which enhances the visitor experience is essential in order to ensure that Corangamite Shire remains competitive with other areas that have iconic product (E.g.: the Penguin Parade and Sovereign Hill) which focus on visitor experience rather than general sightseeing.

Corangamite Shire is well positioned to expand its eco-tourism and nature based tourism activities, by complementing the pristine and iconic natural attractions. New public sector initiatives include the Crater to Coast Trail, a world class interpretive centre at Port Campbell National Park and the Great Ocean Walk. Building on this there is opportunity for private sector investment in nature based tourism product such as wildlife tours (penguins), guided walks, education and other soft adventure activities.

5. ACCOMMODATION DEMAND AND SUPPLY ANALYSIS

5.1. INTRODUCTION

The project brief highlights the importance of accommodation provision in creating economic benefits for Corangamite Shire. The provision of accommodation which meets the needs of visitors is essential for increasing length of stay and adding to visitor yield.

The strategic policy review earlier in this report highlights opportunities for accommodation development and the analysis of visitor markets suggests that the provision of accommodation could be improved to meet visitor market segments of Corangamite Shire.

This section provides a review of the demand and supply of accommodation in Corangamite Shire, with the aim to identify opportunities for accommodation development. It is essential that this report provides a strategic assessment to identify demand for accommodation segments in Corangamite Shire to support any strategic recommendations on land use for tourism purposes.

5.2. SUPPLY ANALYSIS

5.2.1. INTRODUCTION

The categories of accommodation investigated include:

- Self contained houses / apartments;
- Conference centres;
- Motel accommodation;
- Hotel resort;
- Backpackers and group accommodation;
- Bed and breakfast / guest house accommodation; and
- Caravan parks.

The analysis of supply uses data from the following information sources:

- RACV Tourist Accommodation Guide 2008;
- Australia Bureau of Statistics Survey of Tourist Accommodation;
- Tourism Victoria forecasts and expenditure; and
- Individual establishment's websites.

5.2.2. OVERVIEW OF ACCOMMODATION SUPPLY

The following table provides an overview of accommodation supply in Corangamite Shire. There are 786 guest rooms identified within Corangamite Shire.

Self contained accommodation has the largest number of establishments (48) and the greatest proportion of rooms (332) within Corangamite Shire, this is followed by Motel accommodation (295). This highlights that almost 80% of the accommodation in the Shire is in two forms of accommodation typologies (Self contained and Motel accommodation).

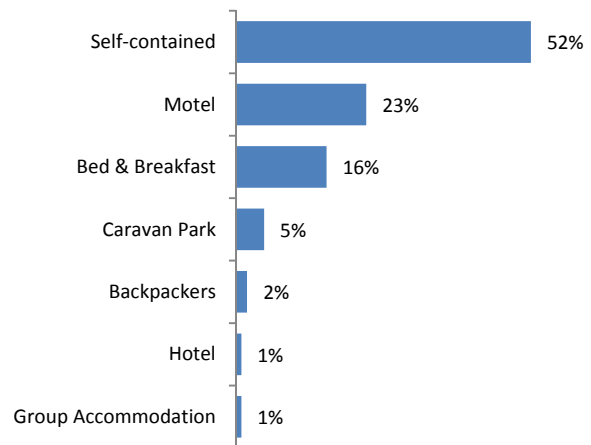
TABLE 4 OVERVIEW OF ACCOMMODATION SUPPLY

Type	Number of Establishments	Number of Rooms	Average number of Rooms per Establishment
Self-contained	48	332	7
Motel	25	295	12
Caravan Parks	8	48	6
Bed and Breakfast	15	46	3
Backpackers	3	22	7
Hotel Resorts	2	18	9
Group Accommodation	1	25	25
Total	102	786	7.7

TYPE OF ACCOMMODATION

TYPE OF ESTABLISHMENTS BY NUMBER OF ESTABLISHMENTS

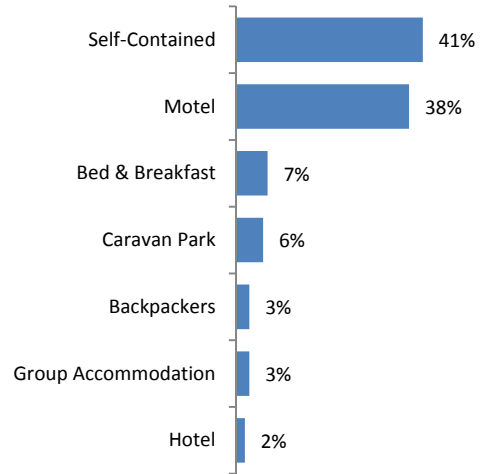
The chart to the right shows the number of establishments by accommodation type in Corangamite Shire. From this it can be seen that self contained accommodation represents the largest market share of accommodation (52%) followed by Motels (23%). Hotels and Group Accommodation represent the lowest market share of accommodation in Corangamite with both having a 1% share on the market.



GUEST ROOMS BY TYPE OF ESTABLISHMENT

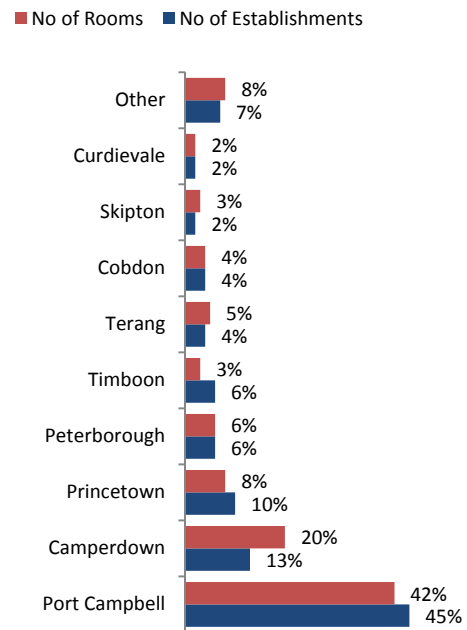
The majority of guest rooms in accommodation in Corangamite Shire are in Self Contained (41%) and Motel accommodation (38%).

The remaining accommodation types contribute 21% to the room supply in Corangamite Shire.



LOCATION OF ACCOMMODATION OF ESTABLISHMENTS

The chart to the right shows the location of accommodation establishments in Corangamite Shire. Port Campbell contains the largest supply of accommodation establishments in Corangamite Shire with 45% of all accommodation establishments being located there. Port Campbell also contains 42% of guest rooms within the Corangamite Shire.



Source: Data compiled by Urban Enterprise

** Peterborough is located in Moyne Shire, however it is on the border of Corangamite Shire and is located in close proximity to Port Campbell National Park.

5.2.3. SUPPLY OF SELF CONTAINED ACCOMMODATION

NUMBER OF ESTABLISHMENTS

There are 48 self contained accommodation establishments in Corangamite Shire. The majority of these establishments are located in Port Campbell.

ROOMS AND APARTMENTS

There are 332 rooms in self contained accommodation in Corangamite Shire. This is an average of seven rooms per establishment.

SIZE

The size of self contained establishments in Corangamite Shire varies considerably. The smallest establishments have two rooms yet two of the larger establishments have 19 rooms.

QUALITY

Many of the self contained establishments in Corangamite are unrated. This may affect their ability to attract visitors. The majority of establishments that are AAA rated are rated between 3 and 4.5 stars. There is only one self contained establishment rated five stars in Corangamite Shire (Moonlight Head Eco Lodges). The establishment comprises just nine out of the 332 rooms available in self contained establishments around the Shire and therefore has little impact on the total accommodation available.

ROOM RATES

Room rates for self contained accommodation in Corangamite Shire vary considerably depending on establishment quality and star rating.

FACILITIES

The majority of self contained establishments have a relatively good standard of facilities. Standards vary considerably between establishments with some having a minimum of amenities including tea/coffee facilities, wood fire, cooking facilities.

KEY FINDINGS

- There is only one establishment that has an AAA rating of 4.5 stars and one with a 5 star rating. This highlights a gap for luxury self contained establishments in the Shire and subsequently does not cater for a significant proportion of the market.
- A large number of establishments are unrated. This may affect their ability to draw in customers who are seeking certainty in their accommodation.
- Self contained accommodation is predominantly located in the south of Corangamite Shire.
- Self contained accommodation is predominantly used by domestic visitors.

TABLE 5 SUPPLY OF SELF CONTAINED ESTABLISHMENTS IN CORANGAMITE SHIRE

Number of Establishments	Number of rooms	Average Number of Rooms per Establishment
48	332	7

5.2.4. SUPPLY OF CARAVAN PARKS

NUMBER OF ESTABLISHMENTS

There eight caravan parks throughout the Corangamite Shire.

ROOMS

There are 48 cabins in caravan parks in Corangamite Shire. There are over 400 camping sites identified in Caravan Parks in the Corangamite Shire.

SIZE

The size of the caravan parks vary between establishments. The Great Ocean Road Caravan Park has the largest number of cabins (a total of 200 while the Apostles Camping Park & Cabins is the smallest with six cabins). Port Campbell Recreation Reserve Camping has no cabins and operates as a camping reserve. The Port Campbell Holiday Park has the largest number of caravan / camping sites with a total of 76 powered sites and 54 unpowered sites.

By industry standards the Caravan Parks in Corangamite Shire would be classified as small to medium sized parks.

QUALITY

Lakes and Craters Holiday Park in Camperdown has a star rating of two while the Great Ocean Road Tourist Park has a four star rating.

SITE RATES

Site rates vary between caravan parks. Powered sites range from \$21 to \$40 per night while unpowered sites range from \$17 to \$39 per night. Cabins are considerably more expensive than sites costing between \$50 and \$120 per night.

FACILITIES

Facilities vary between establishments. The caravan parks identified have a minimum standard of facilities including tea/coffee facilities, laundry, bbq and cooking facilities. Port Campbell Recreation Reserve Camping has fewer facilities available as it is a camping reserve.

KEY FINDINGS

- There are two caravan parks in the north of the Shire. All other Caravan Parks are located along the coast.
- There is just one large caravan park in Corangamite Shire (i.e.: more than 200 sites).

TABLE 6 SUPPLY OF CARAVAN PARKS IN CORANGAMITE SHIRE

Number of Establishments	Number of rooms / cabins	Camping Sites	Number of Powered / Unpowered Sites	Average cabins per Establishment
8	48	Over 400	211 / 115	6

5.2.5. SUPPLY OF MOTELS

NUMBER OF ESTABLISHMENTS

There are 23 motel establishments located in Corangamite Shire. Their locations are spread evenly across the Shire.

ROOMS

There are 277 rooms in motels across Corangamite Shire.

SIZE

The size of motels in Corangamite Shire vary in size considerably ranging from 4 rooms to 34 rooms.

QUALITY

Motels in Corangamite Shire range from low to medium quality. AAA ratings for motels are between two stars and four stars. There are no motels with a AAA rating higher than four stars.

ROOM RATES

Room rates for motels in Corangamite Shire range from \$40 per room per night to \$205 per room per night.

KEY FINDINGS

- Nothing over 4 stars, there may be opportunity for a 4.5 star hotel to cater for high end market.
- There is an extensive existing supply of motels in the Shire.

TABLE 7 SUPPLY OF MOTELS IN CORANGAMITE SHIRE

Number of Establishments	Number of rooms	Average Number of Rooms per Establishment
23	277	12

5.2.6. SUPPLY BED AND BREAKFAST ACCOMMODATION

NUMBER OF ESTABLISHMENTS

There are 15 bed and breakfast establishments in Corangamite Shire. The majority of these are in Port Campbell.

ROOMS

There are 46 rooms in bed and breakfast establishments in Corangamite Shire.

SIZE

The size of bed and breakfast establishments in Corangamite Shire ranges from between 2 and 7 rooms.

QUALITY

Bed and Breakfast establishments have a relatively high AAA rating. All bar one of the rated establishments have a AAA rating of 4 stars with the remaining establishment rated 4.5 stars. However, eight establishments are not rated which may influence their ability to attract visitors.

ROOM RATES

Room rates vary considerably with the majority of establishments charging between \$60 and \$200 per night.

FACILITIES

Bed and breakfasts in Corangamite Shire generally have a high standard of facilities. Many include a full breakfast.

KEY FINDINGS

There is an opportunity for bed and breakfast or boutique accommodation to locate in the hinterland area.

TABLE 8 SUPPLY OF BED AND BREAKFAST ESTABLISHMENTS IN CORANGAMITE SHIRE

Number of Establishments	Number of rooms	Average Number of Rooms per Establishment
15	46	3

5.2.7. SUPPLY OF BACKPACKERS HOSTELS

NUMBER OF ESTABLISHMENTS

There are three backpacker establishments in Corangamite Shire. Two are located in Port Campbell and one located in Princetown.

ROOMS

There are 22 rooms in backpacker hostels in Corangamite Shire. These rooms provide a total of 89 beds.

SIZE

The largest of the three backpackers in Corangamite Shire has 18 rooms and 65 beds.

QUALITY

Ocean House Backpackers is the only one of the three that has been rated. It has an AAA rating of two stars.

ROOM RATES

Ocean House Backpackers is the least expensive of the three hostels with prices starting from \$54 per night. Port Campbell Hostel is slightly more expensive with prices starting from \$75 per night.

FACILITIES

The two larger backpacker establishments located in Port Campbell have a relatively large range of facilities. Both have an equipped kitchen while Port Campbell Hostel has travel assistance and security key cards for each room and Ocean House Backpackers has gas heating with an open log fire in the lounge room.

KEY FINDINGS

There are only three backpacker hostels in the Shire. This may limit the number of visitors due to the limited amount of accommodation. Moreover, two of hostels are located in Port Campbell which discourages and limits the opportunity for backpackers to visit other parts of the Shire.

There may be opportunity for a larger backpacker facility with a higher star rating.

TABLE 9 SUPPLY OF BACKPACKER HOSTELS IN CORANGAMITE SHIRE

Number of Establishments	Number of rooms	Number of Beds
3	22	89

5.2.8. NATURE BASED AND WALKER ACCOMMODATION

A number of the existing accommodation establishments as identified above are used by walkers, particularly self contained and backpacker accommodation around the coastal areas and Port Campbell. There are however very few accommodation establishments in close proximity to the Great Ocean Walk at key stopover points. In addition there is no accommodation in Corangamite Shire identified that could be classified as “nature based accommodation”, i.e: accommodation that has direct links with nature (other than small scale self contained accommodation in the Moonlight Head Area).

5.2.9. CONCLUSION

There are 786 rooms and over 1,800 beds in accommodation establishments in Corangamite Shire. Port Campbell has the greatest number and the largest variety of tourist accommodation establishments compared to the remainder of Corangamite Shire however most of these are small scale. The current strength in the provision of accommodation in the Shire is Motels and Self Contained Accommodation.

There are a number of accommodation gaps in Corangamite, they include:

- Accommodation in the North of the Shire;
- High quality accommodation: resorts etc;
- Internationally ready accommodation at Port Campbell;
- Nature based and walker accommodation.
- Accommodation in the coastal hinterland.

5.3. DEMAND ANALYSIS

5.3.1. INTRODUCTION

The following section provides an overview of accommodation demand in Corangamite Shire

The demand analysis uses data from:

- Tourism Australia Survey Data;
- Tourism Victoria;
- Tourism Forecasting Committee;
- ABS Survey of Tourist Accommodation; and
- Primary research by Urban Enterprise.

5.3.2. OVERVIEW OF ACCOMMODATION OCCUPANCY (HOTELS, MOTELS, SERVICED APARTMENTS)

Table 10 shows tourist accommodation trends in the financial years of 06/07, 07/08 and 08/09 for Corangamite Shire as published in the ABS Survey of Tourist Accommodation. Averages across the year have been used where appropriate.

Table 10 shows that the number establishments in Corangamite Shire have remained constant between July 2006 and June 2008 (23). However, the number of room nights occupied has decreased over this time from 54.8% to 49.6%. Average takings per room have decreased during this time reflecting reduced levels of growth for accommodation establishments in Corangamite Shire.

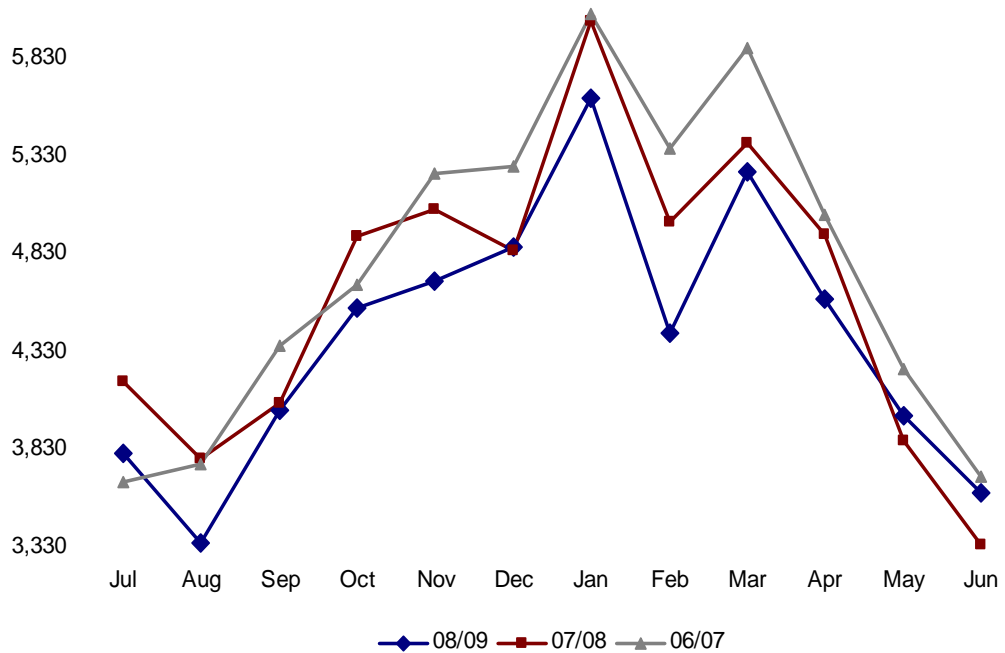
TABLE 10 SURVEY OF TOURIST ACCOMMODATION, HOTELS, MOTELS AND SERVICED APARTMENTS WITH FIVE ROOMS OR MORE

	06/07	07/08	08/09
Establishments	23	23	23
Rooms	287	289	292
Bed spaces	842	886	814
Persons Employed	156	154	152
Room Nights Occupied	57,179	55,349	52,768
Room Occupancy Rate	54.8%	52.3%	49.6%
Guest Arrivals	70,439	72,650	68,638
Guest Nights Occupied	113,211	106,614	98,771
Bed Occupancy Rate	36.9%	32.7%	33.3%
Average Length of Stay	1.6 nights	1.5 nights	1.4 nights
Takings	\$6,089,969	\$6,061,653	\$5,799,520
Average takings Per Room Night Occupied	\$105.93	\$108.65	\$108.96
Average takings per room night available	\$58.28	\$57.24	\$54.57

Source: ABS Survey of Tourist Accommodation September 2006- June 2009 Cat. No. 8635.2.55.001

Figure 1 shows the total room nights occupied each month between July 2006 and June 2008. This shows that the summer months are the most popular time to stay in Corangamite Shire. Visitor numbers in the summer months have been in steady decline from 06/07 to 08/09.

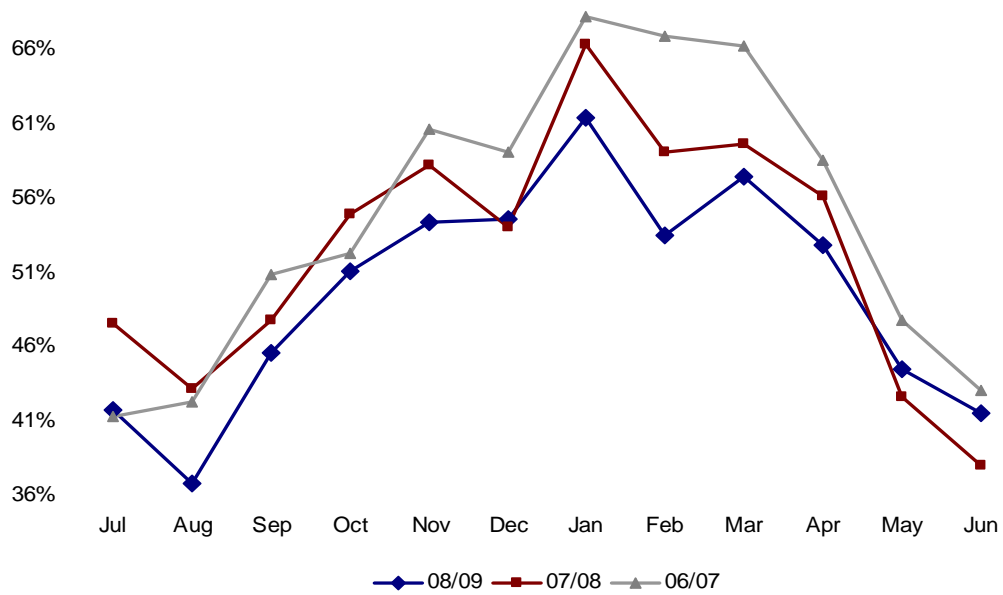
FIGURE 1 ROOM NIGHTS OCCUPIED CORANGAMITE SHIRE 08/09 - 06/07



Source: ABS Survey of Tourist Accommodation 2006-2008 Cat. No. 8635.2.55.001

Figure 2 shows the room occupancy rate in Corangamite Shire between July 2006 and June 2008. This shows that similarly to the number of room night occupied, there was a significant decrease in occupancy during the summer months. During the summer months, room occupancy rates have been in steady decline from 06/07 to 08/09.

FIGURE 2 ROOM OCCUPANCY RATE CORANGAMITE SHIRE 08/09 - 06/07



Source: ABS Survey of Tourist Accommodation 2006-2008 Cat. No. 8635.2.55.001

5.3.3. CARAVAN PARK OCCUPANCY

The table below identifies the occupancy rate for Caravan Parks located in Corangamite Shire between June 2008 and June 2009, sourced from the Survey of Tourist Accommodation, Australian Bureau of Statistics. Data for March 2009, March 2008 and earlier is not available.

This shows that similarly to hotels, motels and serviced apartments, the most popular time to visit is in the summer months. June 2009 had a significantly greater occupancy rate than June 2008 (49.9% compared to 36.3%) suggesting that caravan parks have increased in popularity. This may be a direct result of the economic climate and consumers seeking low cost accommodation.

TABLE 11 OCCUPANCY RATE FOR CARAVAN PARKS IN CORANGAMITE SHIRE JUNE 08 - JUNE 09

Quarter	Occupancy Rate
June 09	49.9%
March 09	n/a
Dec 08	54.2%
Sept 08	40.2%
June 08	36.3%

Source: Survey of Tourist Accommodation, 2007, Australian Bureau of Statistics

5.3.4. ACCOMMODATION MARKETS

Table 12 shows a cross tabulation of reasons people visited Corangamite Shire compared with the type of accommodation they used. Those visiting for holiday or leisure were most likely to stay at a hotel, resort, motel or motor inn (50%). Those visiting for business purposes were most likely to stay in a hotel, resort, motel or motor inn (44%). Not surprisingly, 80% of those visiting friends and family stayed at a friend or relative's property.

TABLE 12 REASON OF VISIT COMPARED WITH TYPE OF VISITOR, CORANGAMITE SHIRE (2006, 2007 AND 2008)

	Holiday or leisure	Visiting friends and relatives	Business	Other	Total
Hotel resort motel or motor Inn	50%	11%	44%	11%	33%
Guest house or B&B	5%	-	-	22%	3%
Rented house apartment flat or unit	6%	2%	-	-	4%
Caravan park or commercial camping ground	18%	2%	-	33%	11%
Friends or relatives property	11%	80%	24%	33%	41%
Own property (e.g. holiday house)	2%	2%	32%	-	5%
Caravan or camping near road or on private property	6%	1%	-	-	3%
Other	1%	1%	-	-	1%
Total	100%	100%	100%	100%	100%

Source: Tourism Research Australia 2009

Table 13 shows the type of hotel, motel, motor inn, guest house or rented flat / apartment compared to the type of visitor. From this it can be seen that the majority of each type of visitor (except other) stays in a standard hotel, the greatest proportion of which is represented by those visiting friends and family (80%).

TABLE 13 TYPE OF HOTEL, MOTEL, RESORT OR MOTOR INN COMPARED TO TYPE OF VISITOR, CORANGAMITE SHIRE (2006,2007,2008)

	Holiday or leisure	Visiting friends and relatives	Business	Other	Total
Luxury hotel or luxury resort (4 or 5 star)	8%	7%	36%	-	10%
Standard hotel motor inn (below 4 star)	68%	80%	64%	33%	68%
Serviced apartment	5%	-	-	-	4%
Guest house or B&B	9%	-	-	67%	8%
Rented house apartment flat or unit	10%	13%	-	-	9%
Total	100%	100%	100%	100%	100%

Source: Tourism Research Australia 2009

5.3.5. TRENDS IN ROOM RATES

Table 14 provides an overview of the changes in tariffs for a double room in various accommodation facilities. The Twelve Apostles Motel and Country Retreat recorded the greatest percentage increase in tariffs (6.1%) while the Mt Elephant Hotel Motel increased its tariffs by 0.5%, the smallest increase of all accommodation establishments.

Establishments in the coastal locations have increased tariffs at a significantly higher rate than other locations, demonstrating higher demand in coastal areas.

TABLE 14 SELECTED ACCOMMODATION ROOM RATES, PER DOUBLE PER NIGHT

	00-01	01-02	02-03	05-06	Current prices	Annual Change
Camperdown Cascade Motel	\$60 - \$105	\$65 - \$110	\$65 - \$110	\$75 - \$100	\$85 - \$110	2.0%
Grand Central B&B Cobden	-	\$100 - \$165	\$100 - \$165	\$110 - \$175	\$130 - \$200	3.1%
Mt Elephant Hotel Motel	-	\$55	\$55	\$60	From \$57	0.5%
Great Ocean Rd Motor Inn	\$115 - \$155	\$120 - \$175	\$125 - \$205	\$125 - \$205	From \$115	2.0%
Loch Ard Motor Inn	\$75 - \$105	\$88 - \$120	\$88 - \$130	\$95 - \$160	\$110.00 to \$170.00	5.0%
Twelve Apostles Motel and Country Retreat	\$77 - \$110	\$77 - \$110	\$79 - \$120	\$100 - \$170	\$110.00 to \$180.00	6.1%
Terang Motor Inn	\$61.50 - \$71.50	\$60 - \$88	\$65 - \$80	\$70 - \$77	\$85	3.0%
Ridgewood Heights	\$80 - \$120	\$88 - \$132	\$90 - \$132	\$90 - \$132	\$100.00 to \$132.00	1.8%

Source: RACV Accommodation Guide

STATE WIDE ACCOMMODATION PERFORMANCE TRENDS

The following table provides an overview of trends in room occupancy for Victoria. The data shows consistent occupancy over the past 5 years, even though the supply of rooms has increased significantly by over 1,100 rooms over the same period. This highlights continued growth in the number of persons staying in tourist accommodation and also adds to the argument that supply contributes to generating demand.

This is critically important for Corangamite Shire, as the available tourism data shows only moderate levels of room occupancy, however the supply of accommodation is limited. With the level of visitors that are attracted to Port Campbell National Park, there is a readily available market to draw from providing accommodation meets the expectations of the market segments.

TABLE 15 TRENDS IN ROOM OCCUPANCY 2005–2009 – VICTORIA

	March	June	September	December
2005	55.1	49.2	47.8	52.6
2006	55.7	49.8	48	53.6
2007	57.4	49.8	50.1	54.5
2008	56.7	51.8	50.3	54.3
2009	55.6	49.6	-	-

Survey of Tourist Accommodation, ABS

5.3.6. OVERVIEW

The following conclusions can be drawn from the demand analysis:

- Survey of Tourist Accommodation data shows that room occupancy rates range from 36% - 66% in Corangamite Shire depending on the month.
- The summer months are the most popular time to visit Corangamite Shire.
- Establishments in the coastal locations have increased tariffs at a significantly higher rate than other locations, demonstrating higher demand in coastal areas. A number of accommodation establishments in the north of the Shire have increased tariffs well below CPI in the past five years, in some cases tariffs have increased up to 0.5% per annum. Establishments in the south of the Shire have increased tariffs on average up to 6% annually.
- Persons visiting for holiday or leisure were most likely to stay at a hotel, resort, motel or motor inn (50%). Those visiting for business purposes were most likely to stay in a hotel, resort, motel or motor inn (44%).
- Victorian state-wide trends highlight consistent levels of room occupancy in the past five years and show that additional room supply delivered by accommodation establishments has been met by an increase in demand.

5.4. KEY FINDINGS

There are 753 guest rooms and 1,575 bedspaces in accommodation establishments in Corangamite Shire. Port Campbell has the greatest number and the largest variety of tourist accommodation establishments compared to the remainder of Corangamite Shire however most of these are small scale. The current strength in the provision of accommodation in the Shire is in Motels and Self Contained accommodation.

Demand data suggests that the areas with the greatest demand for tourist accommodation are those in the southern part of Corangamite Shire, in particular coastal areas and the coastal hinterland. This is supported by research which suggests that the Port Campbell National Park attracts over 2 million visitors annually - over three quarters of all visitors to the Corangamite Shire. Statewide data from Tourism Research Australia highlights that with increased supply of rooms, occupancy levels have remained consistent over time. This adds to the argument that whilst accommodation establishments are operating at moderate occupancy levels, an increase in supply of targeted and quality accommodation can attract new overnight visitors to Corangamite Shire.

Based on the visitor markets, the initial opportunities for accommodation development include:

- Large high quality 4.5-5 star internationally ready accommodation along the Great Ocean Road within close proximity to Port Campbell National Park. This would be targeted towards high yield independent travellers and small tour groups.
- Boutique high quality accommodation in the Coastal Hinterland (B&BS, Self Contained);
- Large 4 star accommodation such as an integrated resort facility (incorporating a Tourist Park, Self Contained Accommodation, Bistro/Dining, Bar, recreation facilities). This would be targeted to large coach groups, the touring market and family groups.
- Walker accommodation in various locations which meets the demand from the Great Ocean Walk. This includes a range of accommodation types which meet the various market segments (self contained cabins, fixed tent camp sites, backpacker and 5 star fully catered accommodation).

6. PLANNING AND DEVELOPMENT FRAMEWORK

6.1. INTRODUCTION

This section of the report reviews the planning and development framework for Corangamite Shire. In particular this section reviews the opportunity to accommodate tourism development in the existing urban centres and rural areas of Corangamite Shire, with the aim to identify any constraints within the planning framework which present barriers to investment.

6.2. TOURISM DEVELOPMENT

The following is an extract for planning permits approved for tourism related development in Corangamite Shire for the years 2004-2009. It has been too difficult to access data previous to this period, due to changes in data collection at Corangamite Shire.

The data highlights that commercial investment in tourism related development over the past 5 years has been strong, particularly in accommodation and cafes/restaurants.

Whilst 26 planning permits have been approved for accommodation, the majority of these are smaller scale (This includes permits for use and also additions to existing buildings). The large accommodation establishments which received planning approval over the past five years include:

- Riverland Retreat, a \$20 million motel accommodation development and retail development in Port Campbell with 100 guest rooms (not constructed);
- A Hotel/resort at Moonlight Heads, a \$30 million boutique hotel with 50 rooms (not constructed);
- Southern Ocean Villas, Port Campbell, 20 self contained villa (constructed);
- Sea Foam Villas, self contained accommodation, Port Campbell (constructed).

Anecdotal evidence suggests that a number of these larger resorts have met with local community opposition, and have had to go through lengthy VCAT processes to receive a planning permit.

Whilst these large accommodation establishments have received planning approval, two are yet to be constructed. The financial climate of 2009 may have impacted on developers obtaining finance for these projects.

TABLE 16 PLANNING PERMITS APPROVED FOR TOURISM RELATED DEVELOPMENT IN CORANGAMITE SHIRE 2004–2009

Permit Type	Number of Permits Granted
Accommodation	26
café/restaurant	12
Liquor Licenses	5
Information Centres	4
general food	4
retail business	2
art gallery	1
brewery	1
Total	55

Source: Corangamite Shire Council

6.3. LAND USE REVIEW

6.3.1. URBAN CENTRES

CAMPERDOWN

Camperdown is the largest urban centre in Corangamite Shire with a large commercial centre located on the Princes Highway zoned Business 1 Zone. The majority of the urban land outside of the town centre is zoned Residential 1 Zone.

Both the Business 1 Zones and Residential 1 Zones can accommodate tourist development with permit approval. Upon initial review there appears to be adequate land in Camperdown to accommodate medium scale tourist accommodation if within the existing urban centre. If a larger site was required for an integrated resort development (E.g.: RACV style resort) additional rezoning of land for tourism purposes is likely be required.

SOUTHERN HINTERLAND TOWNSHIPS

The southern hinterland towns of Cobden, Timboon and Simpson provide attractive settings for tourism development. All three towns are limited in terms of the provision of commercial land, however areas currently zoned residential in each township may provide infill opportunities for tourist accommodation development.

It is unlikely however that a larger resort or caravan park would be accommodated within the existing urban township area due to the underlying value of zoned urban land. Land in Timboon may be required to be rezoned to support this activity.

COASTAL TOWNS

The coastal towns of Port Campbell, Peterborough and Princetown provide the only supply of urban coastal land in the Corangamite Shire. Princetown is solely zoned Township Zone due to

the lack of reticulated sewerage in the township, whilst Port Campbell comprises a small commercial centre zoned Business 1 Zone, with the remainder of the town predominantly zoned Residential 1 Zone. The commercial centre of Port Campbell has limited opportunity for tourism development, however there may be opportunity for small tourist accommodation to locate in the Residential 1 Zoned land.

Port Campbell is almost entirely surrounded by National Park and has limited opportunities to accommodate new tourist facilities on land immediately surrounding the township.

The lack of large available sites in the key tourist town of Port Campbell is likely to present a significant barrier to attracting tourist investment in Corangamite Shire. From this initial analysis it is unlikely that there is suitable urban land to accommodate a large integrated resort or tourist/caravan park facility.

In addition to the lack of large scale and greenfield urban sites in Port Campbell a Design Development Overlay (DDO3) applies to most of the township. The objective of the Design Development Overlay is to protect the low scale coastal character and identity of Port Campbell. Whilst the overlay does not specify height restrictions the design guidelines do not encourage larger scale development, this is highlighted by the following directions:

- *The proposal is efficient in its use of space in minimising the building footprint and bulk;*
- *Minimise the building envelope through the innovative and efficient design of interior spaces (e.g. one space can accommodate different functions according to the needs of the current users. This is particularly appropriate for tourist accommodation);*
- *Be designed to place an emphasis on amenity rather than size of space;*
- *Provide building envelopes that respect the modest and small scale building fabric that is characteristic of Port Campbell;*
- *Provide building envelopes that are appropriate for the height and form of the dominant vegetation and landscape type.*

The guidelines above make it very difficult for large scale tourist accommodation to be incorporated in Port Campbell, the lack of land combined with the above recommendations to minimise building footprint creates a situation where large scale tourist accommodation cannot be easily accommodated in Port Campbell.

6.3.2. RURAL LAND USE

The majority of land in Corangamite Shire is zoned Farming Zone. This will have a significant impact on the ability of tourism ventures to be able to locate in these areas as many tourism uses do not conform to uses specified in the planning scheme.

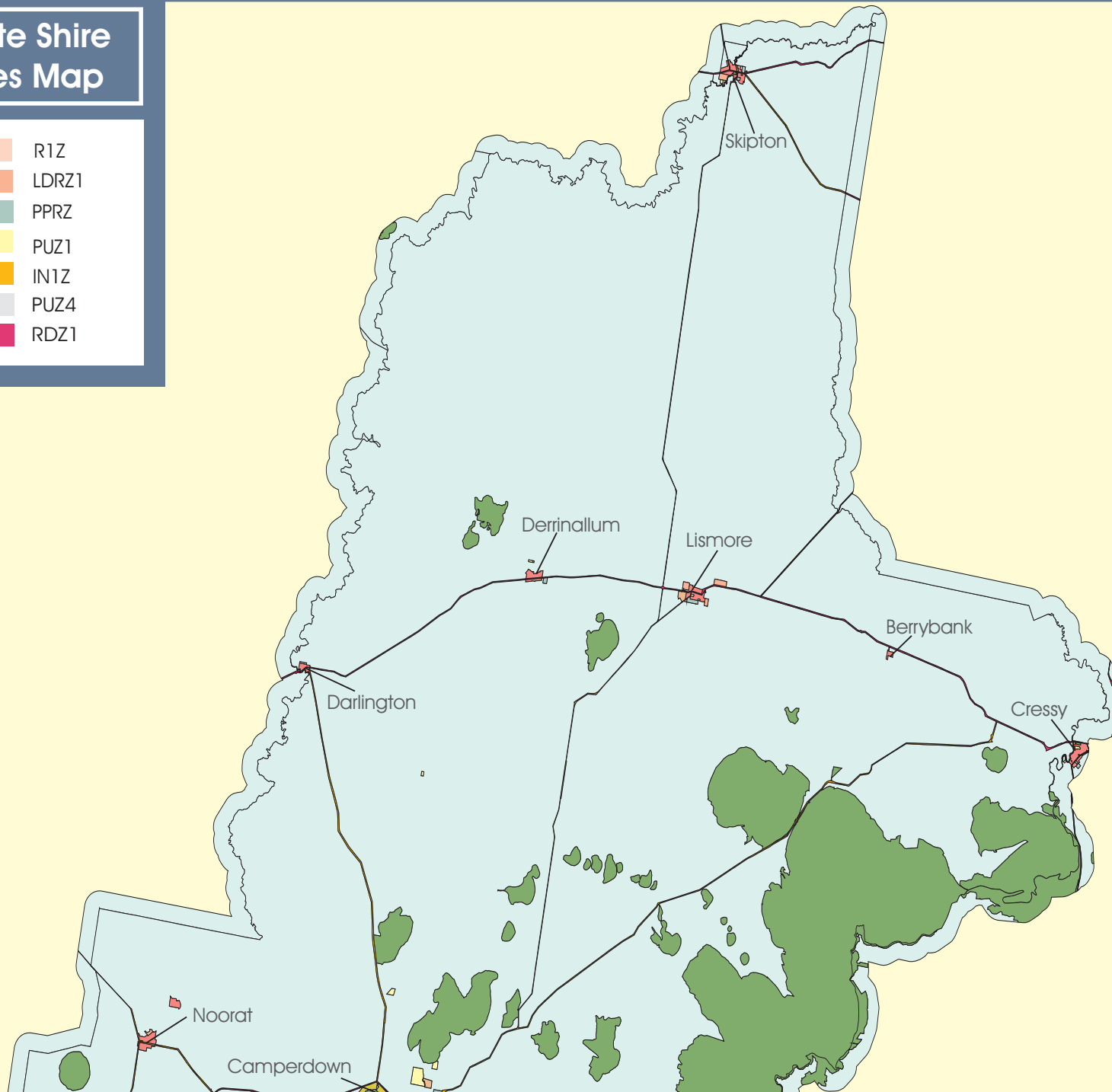
It is clear that the Farming Zone places significant limitations on tourism use and as previously stated, this is the predominant rural zone in Corangamite Shire. In particular, the limitations on tourism uses in the Farming Zone include:

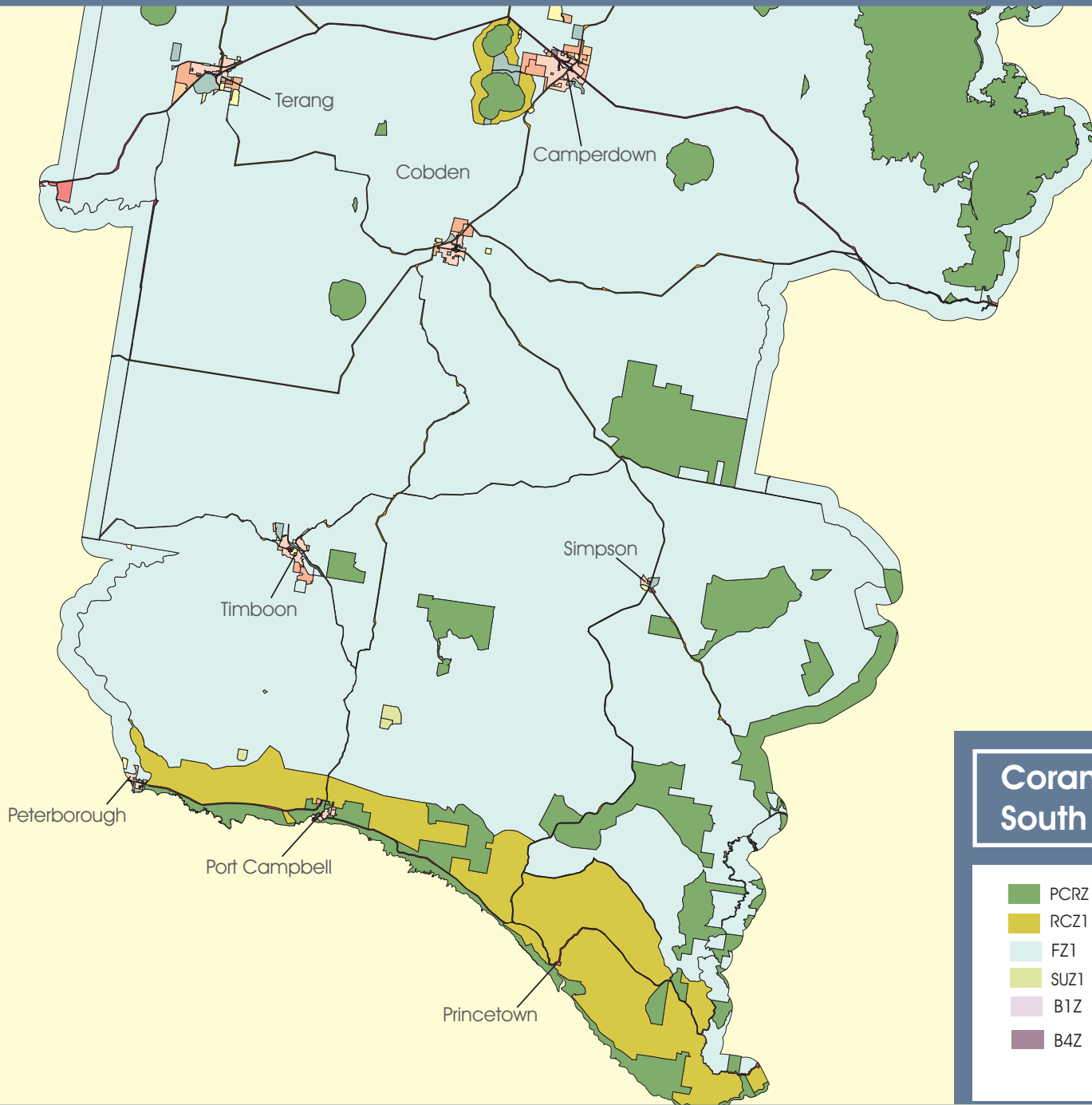
- Prohibition on accommodation, other than a Bed and Breakfast and Host Farm, unless used in conjunction with agriculture, outdoor recreation, rural industry or winery;
- Prohibition on retail sales, other than primary produce sales (which only allows sale of unprocessed produce grown on the property or adjoining property).

Furthermore, much of the land along the coast is zoned Rural Conservation Zone. Development of any kind is greatly restricted in the Rural Conservation Zone which is primarily concerned with protecting and conserving rural land for its environmental features or attributes.














Corangamite Shire North - Zones Map

PCRZ	R1Z
RCZ1	LDRZ1
FZ1	PPRZ
SUZ1	PUZ1
B1Z	IN1Z
B4Z	PUZ4
	RDZ1





Corangamite Shire South - Zones Map

 PCRZ	 R1Z
 RCZ1	 LDRZ1
 FZ1	 PPRZ
 SUZ1	 PUZ1
 BIZ	 IN1Z
 B4Z	 PUZ4
	 RDZ1



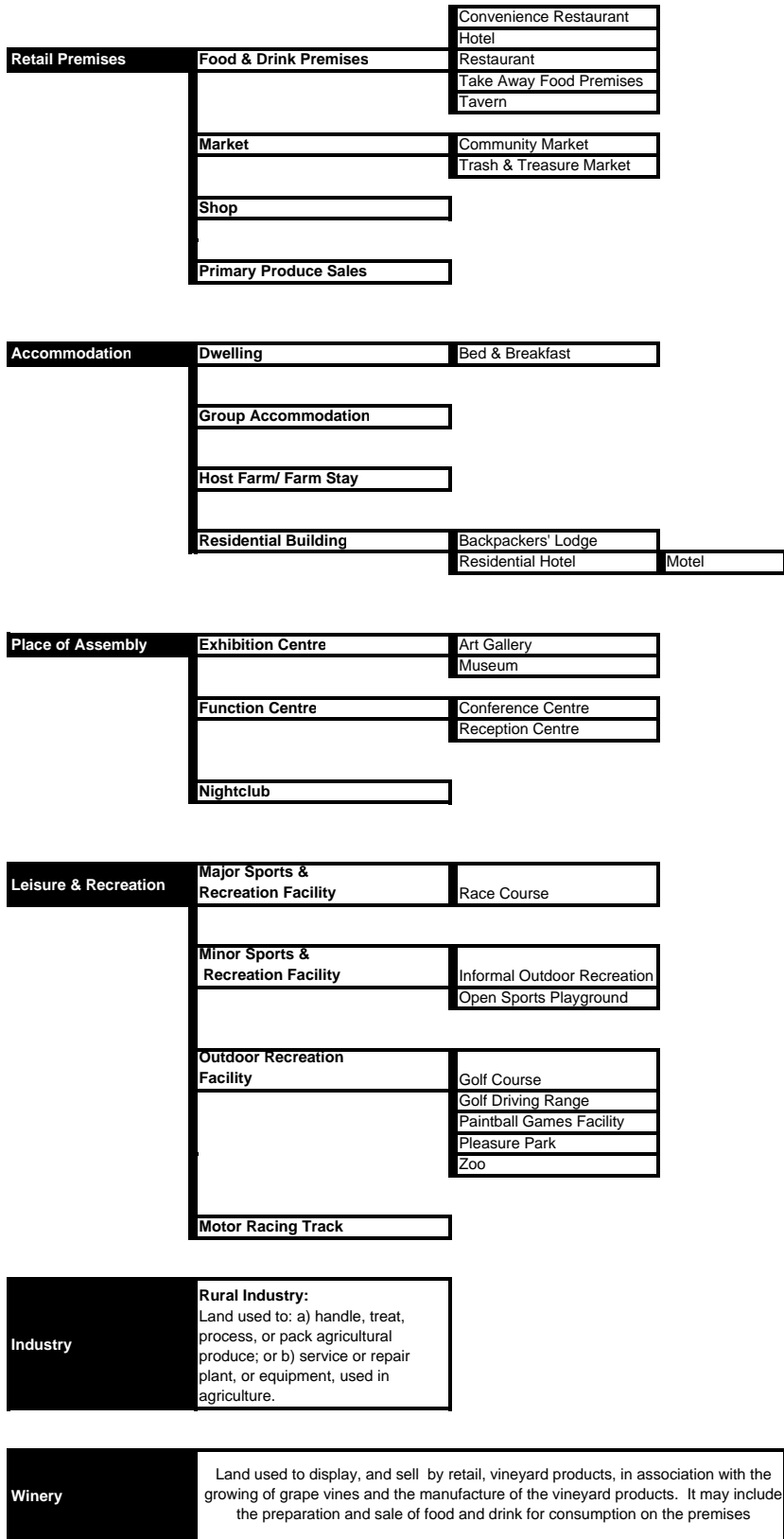
6.4. **LAND USE DEFINITIONS**

Common land use terms used are defined in the Planning Scheme. In some cases, the Planning Scheme defines some uses with reference to other uses.

This “nesting” of land use definitions relevant to tourism is shown in the following table.

FIGURE 3 PLANNING SCHEME USE DEFINITIONS AND NESTING DIAGRAM – TOURIST RELATED USES

PLANNING SCHEME USE DEFINITIONS & NESTING DIAGRAM - TOURISM RELATED USES



Land use terms defined in the Planning Scheme that are relevant to tourism include:

ACCOMMODATION

Includes camping and caravan park, bed and breakfast, dwelling, group accommodation, host farm, backpackers' lodge, motel and residential hotel.

LEISURE AND RECREATION

Includes racecourse, golf course, golf driving range, paintball games facility, pleasure park, zoo, motor racing track, informal outdoor recreation and open sports ground.

PLACE OF ASSEMBLY

Includes art gallery, museum, exhibition centre, function centre, conference centre, reception centre, nightclub, carnival and circus.

RETAIL PREMISES

Includes hotel, restaurant, take away food premises, tavern, convenience restaurant, trash and treasure market, community market, convenience shop and supermarket.

FARM STAY

A farm stay is defined as a host farm.

FUNCTION CENTRE

A function centre includes conference centre and reception centre.

ART GALLERY AND MUSEUM

Art gallery and museum are both included in exhibition centre.

GROUP ACCOMMODATION

Defined as land, in a single ownership, containing a number of dwellings used to accommodate persons away from their normal place of residence.

ZONE PROVISIONS – RELEVANT RURAL AND URBAN ZONES

The opportunity for rural land to be used or developed for tourism is dependent on the zoning of the land.

The following table summarises the main tourist-related uses and whether these are permitted uses or prohibited uses in each of the rural zones.

The following table shows that the most restrictive zone is the Rural Conservation Zone, but this is to be expected given the purpose of the zone. The Rural Activity Zone and Rural Living Zone have wide discretion in relation to tourist uses, however the purpose of the Rural Living Zone is to provide for residential use in a rural setting. The Rural Activity Zone is the zone that is designed to accommodate tourist uses and development in rural areas.

The common urban zones in Corangamite Shire are Business 1 Zone and Residential 1 Zone. The table highlights that accommodation and tourism uses can generally be accommodated within these zones.

TABLE 17 OVERVIEW OF TOURISM-RELATED USES IN RURAL ZONES

Use	Farming	Rural Living	Rural Conservation	Rural Activity	Business 1 Zone	Residential 1 Zone
Art Gallery	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required
Backpackers' Lodge	Use Prohibited	Permit Required	Use Prohibited	Permit Required	Permit required	Permit Required
Bed and Breakfast	Permit not Required Must not accommodate more than six people away from their normal place of residence. One car park must be provided for every two people accommodated away from their normal place of residence	Permit not Required Must not accommodate more than six people away from their normal place of residence. One car park must be provided for every two people accommodated away from their normal place of residence	Permit not Required Must not accommodate more than six people away from their normal place of residence. One car park must be provided for every two people accommodated away from their normal place of residence.	Permit Not Required Must not accommodate more than six people away from their normal place of residence. One car park must be provided for every two people accommodated away from their normal place of residence	Permit Required	Permit Not Required No more than 6 persons may be accommodated away from their normal place of residence. At least 1 car parking space must be provided for each 2 persons able to be accommodated away from their normal place of residence.
Camping and Caravan Park	Use Prohibited	Permit Required	Use Prohibited	Permit Required	Permit required	Permit Required
Carnival	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997.	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997.	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997.
Cinema Based Entertainment Facility	Use Prohibited	Use Prohibited	Use Prohibited	Use Prohibited	Permit not required	Use Prohibited
Circus	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997.	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997.	Permit not Required Must meet the requirements of A 'Good Neighbour' Code of Practice for a Circus or Carnival, October 1997.
Community Market	Permit Required	Permit Required	Permit Required	Permit Required	Permit required	Permit required
Conference Centre	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit required	Permit required

Use	Farming	Rural Living	Rural Conservation	Rural Activity	Business 1 Zone	Residential 1 Zone
Convenience restaurant	Use Prohibited	Use Prohibited	Use Prohibited	Use Prohibited	Permit not Required	Permit required The site must adjoin, or have access to, a road in a Road Zone.
Convenience shop	Use Prohibited	Permit Required	Use Prohibited	Permit Required The site must not have direct access to a rural freeway.	Permit Required	Permit required The leasable floor area must not exceed 80 square metres.
Dwelling	Permit not Required Must be the only dwelling on the block. Lot must be at least the size specified on the Schedule to the zone otherwise it must be 40 hectares, must be the only dwelling on the lot, must meet requirements of the Schedule to Special Use Zone 1	Permit not Required Lot must be at the size specified in the Schedule to this Scheme or at least 8 hectares, must be the only dwelling on the lot, must meet requirements of the Schedule to Clause 35.03-2.	Permit Required Must be the only dwelling on the lot. This does not apply to the replacement of an existing dwelling if the existing dwelling is removed or altered (so it can no longer be used as a dwelling) within one month of the occupation of the replacement dwelling.	Permit Required	Permit Required Any frontage at ground floor level must not exceed 2 metres.	Permit not Required
Exhibition Centre	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit required
Function Centre	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit required
Golf Course	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit required
Golf Driving Range	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit required
Group Accommodation	Permit Required Must be used in conjunction with agriculture, outdoor recreation facility, rural industry or winery. No more than 6 dwellings.	Permit Required	Permit Required Must be used in conjunction with Agriculture, Rural Industry or Winery, no more than six dwellings.	Permit Required	Permit Required	Permit required
Host Farm	Permit Required	Permit Required	Permit Required	Permit Required	Permit Required	Permit required
Hostel	Use Prohibited	Permit Required	Use Prohibited	Use Prohibited	Permit Required	Permit required
Hotel	Use Prohibited	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit required
Informal Outdoor Recreation	Permit not Required	Permit not Required	Permit not Required	Permit not Required	Permit not Required	Permit not Required
Motel	Use Prohibited	Permit Required	Use Prohibited	Use Prohibited	Permit not Required	Permit required

Use	Farming	Rural Living	Rural Conservation	Rural Activity	Business 1 Zone	Residential 1 Zone
Motor Racing Track	Use Prohibited	Use Prohibited	Use Prohibited	Permit Required	Use Prohibited	Use Prohibited
Museum	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required
Nightclub	Permit Required Must not be used for more than 10 days in a calendar year.	Use Prohibited	Use Prohibited	Use Prohibited	Permit Required	Use Prohibited
Open Sports Ground	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required
Paintball Games Facility	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required
Pleasure Park	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required
Primary Produce Sales	Permit Required	Permit Required	Permit Required	Permit Required	Permit Required	Use Prohibited
Racecourse	Permit Required	Permit Required	Use Prohibited	Permit Required	Use Prohibited	Permit Required
Reception Centre	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required
Residential Hotel	Permit Required Must be used in conjunction with agriculture, outdoor recreation facility, rural industry or winery.	Permit Required	Permit Required Must be used in conjunction with agriculture, rural industry or winery. Number of bedrooms must not exceed 80 or whatever is specified in the zone, whichever is the lesser.	Permit Required	Permit Required	Permit Required
Restaurant	Permit Required Must be used in conjunction with agriculture, outdoor recreation facility, rural industry or winery.	Permit Required Site must not have direct access to a rural freeway.	Permit Required Must be used in conjunction with agriculture, rural industry or winery. Number of patrons must not exceed the number situated in the schedule or 150 patrons, whichever is the lesser.	Permit Required	Permit Not Required Must not be on land specified in the schedule to this zone.	Permit Required

Use	Farming	Rural Living	Rural Conservation	Rural Activity	Business 1 Zone	Residential 1 Zone
Retail Premises	Use Prohibited Other than Community market, Manufacturing sales, Primary produce sales and Restaurant.	Use Prohibited Other than Community market, Convenience shop, Hotel, Plant nursery, Postal agency, Primary produce sales, Restaurant and Tavern.	Use Prohibited Other than Community market, Plant nursery, Primary produce sales, and Restaurant	Use Prohibited Other than Community market, Convenience shop, Equestrian supplies, Hotel, Landscape gardening supplies, Manufacturing sales, Primary produce sales, Restaurant and Tavern	Permit Required other than Betting agency, Food and drink premises, Postal agency, Shop, and Trade supplies	Use Prohibited Other than Community market, Convenience shop, Food and drink premises, and Plant nursery
Supermarket	Use Prohibited	Use Prohibited	Use Prohibited	Use Prohibited	Permit Required	Use Prohibited
Takeaway Food Premises	Use Prohibited	Use Prohibited	Use Prohibited	Use Prohibited	Permit Not Required	Permit Required The site must adjoin, or have access to, a road in a Road Zone.
Tavern	Use Prohibited	Permit Required Site must not have direct access to a rural freeway.	Use Prohibited	Permit Required	Permit Required	Permit Required
Trash and Treasure Market	Use Prohibited	Use Prohibited	Use Prohibited	Use Prohibited	Permit Required	Use Prohibited
Winery	Permit Required	Permit Required	Permit Required	Permit Required		
Zoo	Permit Required	Permit Required	Use Prohibited	Permit Required	Permit Required	Permit Required

6.5. KEY FINDINGS

Whilst the supply and demand analysis for accommodation identifies a number of opportunities for accommodation development in Corangamite Shire a review of the planning framework has highlighted potential barriers to investment in tourism development.

Firstly the key coastal township of Port Campbell has limited opportunities for a large resort type accommodation establishment due to constraints to township growth and the limited supply of land zoned to accommodate large accommodation establishments. Furthermore a Design and Development Overlay specifies a number of design directions which seek to minimise scale, height and footprints for new buildings. These guidelines are not compatible with large hotel and resort development, particularly when there is limited urban land for development.

Secondly the Farming Zone and Rural Conservation Zones in the rural areas of the Shire place significant limitations on tourism use and new investment in the Corangamite Shire. Limitations on tourism uses in the Farming Zone include:

- Prohibition on accommodation, other than a Bed and Breakfast and Host Farm, unless used in conjunction with agriculture, outdoor recreation, rural industry or winery;
- Prohibition on retail sales, other than primary produce sales (which only allows sale of unprocessed produce grown on the property or adjoining property).

7. OUTCOMES FROM CONSULTATION

7.1. INTRODUCTION

A range of consultation methods have been used to support the study:

- Workshops with the local community and tourism operators (two workshops in Port Campbell, one workshop in Camperdown). These workshops were used to identify opportunity for tourism development in the Shire.
- Consultation with coach tour operators. The aim of this was to understand the existing itineraries of coach tour operators and identify opportunities to increase the number of coach tours which stay overnight in the region.
- Consultation with developers and large tourist facility operators. This included phone interviews and face to face interviews. The aims of these discussions were to identify barriers to investment, the preconditions for tourist development and the opportunities for tourism development in Corangamite Shire.
- Council staff. Many of the Council staff also live within Corangamite Shire. Council staff were asked where they take visitors and what tourism development opportunities exist.
- Landowners. As part of the study the consultant team met with most landowners of land parcels suited to tourism development to discuss their interest in tourism or providing their property for tourism development.

7.2. COACH TOUR OPERATORS

Coach tour operators were contacted early in the strategic planning process to identify the current patterns of coach group tours through the region and the opportunities for capturing the coach market. The consultation provided the following conclusions:

- Whilst coach tours are undertaken year round, visitor numbers are seasonal with the summer months being most popular for coach visitors to the Corangamite Shire.
- There are number of different scales of tours represented (small car, minibus and coach) which travel to Corangamite Shire.
- The vast majority of coach tours are day tours. The reason for this is that many international visitors only set aside a short stay in Melbourne and therefore only have one day which they plan to spend in country Victoria.
- The majority of tours leave from Melbourne. This includes the multi-day tours and daytrip tours.
- Coach tour visitors are generally lower yield and price is an important consideration for accommodation. Some groups stay in Port Campbell with the low cost being a key attractor. Port Campbell has a high representation of mid quality motel accommodation. Motels (twin share / double) are the preferred accommodation of tour operators for tour groups.

- Many tour groups stop for a break in Port Campbell, usually in the afternoon, following their visit to Port Campbell National Park. There is opportunity to improve the provision of retail in Port Campbell targeted at international visitors.
- Smaller groups (min-van) tours have a propensity to stay longer in the region, and often focus on the visitor experience aspect of touring. This market could be targeted further through provision of better quality accommodation and experience based tourism product.

7.3. DEVELOPERS AND INVESTORS IN TOURISM

A number of developers were consulted through the strategy process by phone and one to one meetings. This has provided Urban Enterprise with an understanding of development requirements and the existing barriers to investment. The following provides a summary of these discussions.

BARRIERS TO INVESTMENT

- Rural Zones. The rural zones have made investment in the tourism industry very difficult. The need to link tourism development to farming enterprise as well as the many restrictions on tourism development creates a significant barrier to new tourism development.
- Community opposition to development in Port Campbell. Developers have found residents in Port Campbell as a significant challenge to tourism development in the town. This delays the development process which in turn impacts on development profitability.
- Planning restrictions in Port Campbell. The Existing planning controls in Port Campbell create a significant barrier to the development of larger facilities in Port Campbell.
- Finance (GFC). Financing of tourism projects has been very difficult during the credit crunch and Global Financial Crisis. The ability to attract finance for tourism projects has improved in the last 12 months, however it is still not optimum.
- Lengthy planning processes and uncertainty. Due to the uncertainty in the planning process for development in rural areas, and generally the lengthy planning process in place to achieve planning scheme amendment the timeframes for development are becoming too long to attract investors. Investors generally need a 2-3 year return on investment, however the planning process can take this long on its own.

REQUIREMENTS FOR TOURISM DEVELOPMENT

- Views. Developers of tourist facilities highlighted that views of the coast or rural countryside were an important aspect for tourist accommodation. These are often critical for marketing of the accommodation, and will create a competitive advantage for a facility over one without views.
- Access to infrastructure. For larger tourist facilities access to infrastructure such as reticulated water, sewer and power have been identified as making sites more desirable. Whilst replicating these services is possible, it is much more efficient for larger tourist facilities to be developed in locations which can leverage off existing township services.
- Political support. Broader political support particularly from Local and State Government is a critical component for tourist development. There are already significant hurdles for tourist development such as obtaining a planning permits and finance, support from Local and State Government assists with creating a quicker and smoother development process.

- Proximity to key attractions and other product. Tourist facilities generally benefit when collocated with other tourist product and attractions, this give the visitor choice in experience and can assist with growing yield and length of stay.
- Site with a competitive advantage. The development site should offer a competitive advantage over others, this may include views of the coastline, direct access to the Great Ocean Road or Highway or/and close proximity to a town centre.
- Government Investment in Infrastructure. Discussions with developers highlighted that Government investment in the proposed Interpretive Centre would be a catalyst for their own investment in the region. It was highlighted that a major attraction such as that proposed would create additional demand for accommodation, as visitors would be staying longer.

7.4. CORANGAMITE TOURISM INDUSTRY AND COMMUNITY

Three workshops were conducted in Corangamite Shire for the preparation of the Corangamite Tourism Opportunities Study. These workshops which included two sessions in Port Campbell and one session in Camperdown with the tourism industry and local communities were undertaken to identify opportunities for tourism product development, barriers to tourism development, community acceptance of tourism and the types of tourism development that would be acceptable.

The workshops yielded the following results:

PRODUCT DEVELOPMENT AND INFRASTRUCTURE OPPORTUNITIES

- Conferencing. Conferencing along the Great Ocean Road is an opportunity to attract visitors during the off peak and encourage them to stay longer. The development of a quality conference facility may be an opportunity for exploration in the coastal areas. Further inland there is opportunity for development of Glenormiston College (Terang) as an events and conference venue.
- Events. There is opportunity to expand the range of events held in the Shire. There are a number of underutilised facilities. An inventory of events facilities should be established and marketed for event's organisers.
- Educational/ camps. There is opportunity to develop the Great Ocean Road coastline for camps and education. The development of the Great Ocean Road Interpretive Centre will add to the attraction of school groups.
- Nature based activities. Aside from walking trails, there are limited nature based activities in the Shire. There is opportunity to develop activities like sea kayaking, mountain biking and guided tours.
- Lakes and Volcanoes (part of Kanawinka Geo Park). These provide an opportunity for touring and interpretation. There may be opportunity to link together a volcanic interpretive trail. This could highlight the key geological features in the area such as Mount Elephant, Mount Leura and the other sites.
- Food and produce. Timboon has a number of local produce attractions, there is opportunity to further expand this segment in the Timboon area.]

- Spa. There is opportunity to develop spa and wellness in Corangamite Shire utilising the geothermal aquifer. (Port Campbell's town water is supplied by a geothermal bore, it is possible that part of the Shire could access this geothermal water at shallow depths).
- Cycling events. The Corangamite Shire has a number of attributes suited to cycling. Effort should be made to attract a road cycling event in the off peak.
- Marine Park interpretation. The Marine Park along the coast receives little interest and could be developed further with interpretation on within the Port Campbell National Park.
- Crayfishing industry. Crayfish are caught along the coast off Corangamite Shire, however there is little acknowledgment of the fact. The tourism industry capitalise on this sector through provision of fine dining or an event specialising in crayfish in Port Campbell.
- Rail Trail. There is opportunity to further develop the Camperdown-Timboon Rail Trail through the provision of rest points and accommodation. This rail trail is one of the most scenic in the Country but has a low profile. There is also possibility to operate tours along the rail trail on a small motorised vehicle (similar to Point Nepean National Park).
- Link the Rail Trail from Timboon to Port Campbell and Port Campbell to Moonlight Head (utilising the Great Ocean Walk).
- Public Transport. Public transport is required for visitors to move around the Shire. Importantly the link between Port Campbell and the Camperdown Railway Station needs to be improved.
- History/heritage. There are a number of historic themes in Corangamite Shire. One theme worth exploring is the pastoral heritage, which can be explore throughout the inland townships and the numerous stations throughout the Shire.
- Fishing. There are a number of locations that are renowned for high quality fishing, this includes Lake Bullen Merri and Lake Purrumbete which have Atlantic Salmon and Trout. There is a requirement for improved infrastructure at these lakes for fishing.
- Hidden gems. There are a number of local attractions which are not on the tourist inventory that could be explored further such as Hawks Nest Road for wildlife, Mt Leura, Lake Purrumbete, Mt Elephant, and Lake Bullen Merri.

ACCOMMODATION OPPORTUNITIES

- Large accommodation. Large scale accommodation can maximise the coach tour market to Corangamite Shire. Whilst it is understood that many coach operators will continue to daytrip to Corangamite Shire, the provision of large scale accommodation can encourage some of this market to convert to overnight.
- Great Ocean Walk and Rail Trail accommodation. There is opportunity to develop a range of accommodation targeted to walkers along the Great Ocean Walk. Furthermore, there is opportunity to develop accommodation in Timboon at the end of the rail trail. There are approximately 30,000 people using the Great Ocean Walk each year.
- Demand exceeds supply. During the peak visitor period there is inadequate supply of accommodation beds in Port Campbell to meet the demand.
- Camping and caravan accommodation in northern towns. Towns like Skipton would benefit greatly from offering low cost caravan or camping facilities to visitors. This would allow them to take advantage of the highway location.

VALUES

- No linear development. The Shire should not permit linear development along the roadways and highways in the Shire.
- Tourism development in Port Campbell. The Port Campbell community support tourism in Port Campbell, however tourism development should progress in a way which is consistent with the low scale nature of the township.
- Isolation. Much of the Corangamite Shire has a sense of isolation and wilderness, this should be maintained.
- Villages. Corangamite Shire has an extensive number of small villages; these provide unique community hubs and tourist facilities.
- Climate. The climate can be cold and wet in the winter, however this can be developed as a positive experience, with the right type of accommodation and product. It is important to promote and develop indoor activities.
- Do not encourage high visitation low yield tourism. There is a need to grow tourism yield rather than high traffic low yield tourism for sustainability of the coast. Grow overnight visitors not day-trippers in the coastal areas. Further north, this is not an issue.
- Examples of tourism development suited to Corangamite highlighted by workshop attendees includes: RACV resort, Inverloch; Silverwater resort, San Remo; Peppers Retreat, Hepburn, Lady Bay Resort, Warrnambool.

7.5. COUNCIL STAFF

Council staff were provided with the opportunity to identify some of the hidden tourism product in Corangamite Shire. Their local experience provides an excellent resource on which to build a product inventory upon. The following received high response rates from staff:

WHAT DO COUNCIL STAFF SHOW VISITORS?

- Mt Leura. Most staff take visitors to the top of Mt Leura for the view.
- Timboon Distillery, Berryworld and other food attractions. Many staff take visitors to the Timboon area for a food experience.
- Lakes Gnotuk and Bullen Merri and Botanic Gardens. These lakes provide unique attractions for visitors.
- Camperdown-Timboon Rail Trail. Growing in its importance both as a visitor and local community asset.
- Camperdown Clock Tower. Visitors are fascinated by the clock tower. Visitors can walk up the clock tower on market day.
- Drive from Camperdown to Timboon. As a touring route, the drive from Camperdown to Timboon and on to Port Campbell is very scenic.
- Simpson Farmers Market. Popular activity for visitors.
- Red Duck Provedore, Camperdown. Highly popular with staff, noted for its high quality food and beverage experience.
- Lake Purrumbete. Great fishing location.

TOURISM PRODUCT NEEDED:

- Quality Restaurant in Camperdown - open after 5pm. This issue was highlighted by many staff of Corangamite Shire, the lack of a quality dining experience in Camperdown.
- Better quality cafes and coffee. In addition to fine dining, there is also a requirement for better quality cafes that service interesting and fresh food.
- Adventure playgrounds. There is a need for more activities for families in Corangamite Shire.
- Better shopping. There is very little to do in the towns in Corangamite Shire on weekends, very limited retail and a lack of vibrancy.

7.6. COMMUNITY ATTITUDES TOWARDS TOURISM

A study was conducted by VUT and Geelong Otway Tourism on the attitudes towards tourism by local community along the Great Ocean Road. The following are the findings from the survey conducted:

- Overwhelming majority of respondents were happy with continued growth in tourism (76%);
- Majority acknowledged that they had strong positive feeling towards tourists (57.7%)
- Majority support population growth (56.8%);
- Tourism provides a number of positive impacts for Corangamite Shire, these include improvement of community and recreation facilities, increased activities and business and employment opportunities.

8. TOURISM OPPORTUNITIES FINDINGS AND DIRECTIONS

8.1. TOURISM PRODUCT

A review of tourism product in Corangamite Shire highlights that the majority of product is located south of the Princes Highway.

Understanding the location of existing tourism nodes is important for identifying areas which are suitable for further tourism development in order to maximise efficiencies in joint marketing initiatives by business, labour pools and infrastructure (roads, signage, sewer, water etc) as well as to improve the visitor experience through provision of choice in activities, attractions, accommodation and dining.

The nodes with highest concentration of tourism product are Camperdown and the Great Ocean Road area which comprises Port Campbell Township, Port Campbell National Park, Princetown and Peterborough. The coastal hinterland area including Timboon is also a developing tourism node.

The primary node for tourism development is unquestionably the Great Ocean Road area which incorporates Port Campbell National Park, the iconic Twelve Apostles and unparalleled coastal scenery.

Natural attractions remain the key type of tourism product in Corangamite Shire with the coastal attractions of Port Campbell National Park, the coastal hinterland's remnant forests and the volcanic lakes and topography to the north of the Shire.

Man made tourism product such as food and wine and related attractions are limited in Corangamite Shire, and provide opportunity for future development. Further development of activities that engage the visitor will assist in increasing the "length of stay" and "yield" from visitors.

The development of product which enhances the visitor experience is essential in order to ensure that Corangamite Shire remains competitive with other areas that have iconic product (E.g.: the Penguin Parade and Sovereign Hill) which focus on visitor experience rather than general sightseeing.

Corangamite Shire is well positioned to expand its eco-tourism and nature based tourism activities, by building on the pristine and iconic natural attractions. New public sector initiatives include the Crater to Coast Trail, a world class interpretive centre at Port Campbell National Park and the Great Ocean Walk. There is also opportunity for private sector investment in nature based tourism product such as accommodation, wildlife tours (penguins), guided walks, education and other soft adventure activities.

SOUTHERN CORANGAMITE SHIRE TOURISM DEVELOPMENT OPPORTUNITIES

In summary opportunities for tourism product development in the South of the Shire include:

- Local produce, food and wine. Local produce and wineries in the coastal hinterland - Timboon and surrounds;

- Nature based activities which encourage experience of the natural attractions, e.g.: Eco tours: Fairy Penguin tours, boat charters, guided walks and interpretation;
- Retail activities - greater tourist retail mix in the townships of Port Campbell and Timboon;
- Geothermal spa and wellness centre. Building on the geothermal water in Port Campbell and potentially in the broader region.

NORTHERN CORANGAMITE SHIRE TOURISM DEVELOPMENT OPPORTUNITIES

- Events: Water skiing, sailing, fishing competitions at the volcanic lakes
- Arts, culture and music events in northern towns
- Water based activities. The Volcanic lakes are renowned for high quality fishing. Infrastructure and services to support this industry need further development. Sailing and boating are also development opportunities at these lakes.
- Education. There are a range of educational opportunities in the north of Corangamite Shire. The north is rich in history (indigenous and pastoral) and geology (volcanoes). These are themes which can be further developed for education purposes.
- Dining and food. There is opportunity for better quality dining facilities in towns in the northern Corangamite Shire.

8.2. ACCOMMODATION

There are 753 guest rooms and 1,575 bedspaces in accommodation establishments in Corangamite Shire. Port Campbell has the greatest number and the largest variety of tourist accommodation establishments compared to the remainder of Corangamite Shire however most of these are small scale. The current strength in the provision of accommodation in the Shire is in Motels and Self Contained accommodation.

Demand data suggests that the areas with the greatest demand for tourist accommodation are those in the southern part of Corangamite Shire, in particular coastal areas and the coastal hinterland. This is supported by research which suggests that the Port Campbell National Park attracts over 2 million visitors annually - over three quarters of all visitors to the Corangamite Shire. Statewide data from Tourism Research Australia highlights that with increased supply of rooms, occupancy levels have remained consistent over time. This adds to the argument that whilst accommodation establishments are operating at moderate occupancy levels, an increase in supply of targeted and quality accommodation can attract new overnight visitors to Corangamite Shire.

SOUTHERN CORANGAMITE SHIRE ACCOMMODATION OPPORTUNITIES

Based on the visitor markets, the initial opportunities for accommodation development include:

- Large high quality 4.5-5 star internationally ready accommodation along the Great Ocean Road: in close proximity to Port Campbell National Park. This would be targeted towards high yield independent travellers and small tour groups;
- Boutique high quality accommodation in the Coastal Hinterland (Timboon and surrounds) (B&BS, Self Contained);
- Large 4 star accommodation such as an integrated resort facility along the coast (incorporating a caravan park, self contained accommodation, bistro/dining, bar, recreation

facilities). This would be targeted at larger coach groups, the touring market and family groups.

- Walker accommodation in various locations which meets the demand from the Great Ocean Walk. This includes a range of accommodation types which meet the various market segments (self contained cabins, fixed tent camp sites, backpacker and 5 star fully catered accommodation).

NORTHERN CORANGAMITE SHIRE ACCOMMODATION OPPORTUNITIES

- Large 4-4.5 star accommodation facility on Camperdown to meet the needs of the business market.
- Casual caravan/camping grounds in the smaller northern towns targeted at the touring market (E.g.: Skipton).
- Self contained accommodation in proximity to some of the key northern natural attractions. (e.g.: Lake Purrumbete).

8.3. PLANNING FRAMEWORK

Whilst the supply and demand analysis for accommodation identifies a number of opportunities for accommodation development in Corangamite Shire, a review of the planning framework has highlighted potential barriers to investment in tourism development.

Firstly, the key coastal township of Port Campbell has limited opportunities for a large integrated resort type accommodation establishment due to constraints to township growth and the limited supply of land zoned to accommodate resort accommodation. Furthermore, a Design and Development Overlay specifies a number of design directions which seek to minimise scale, height and footprints for new buildings. These guidelines are not compatible with large resort development, particularly when there is limited urban land for development.

Secondly, the Farming Zone and Rural Conservation Zones in the rural areas of the Shire place significant limitations on tourism use in the Corangamite Shire. In particular, the limitations on tourism uses in the Farming Zone include:

- Prohibition on accommodation, other than a Bed and Breakfast and Host Farm, unless used in conjunction with agriculture, outdoor recreation, rural industry or winery;
- Prohibition on retail sales, other than primary produce sales (which only allows sale of unprocessed produce grown on the property or adjoining property).

8.4. CONCLUSION

A number of tourism development opportunities have been identified in this report. The coastal areas of Corangamite Shire provide demand for tourist facilities of a much larger scale and capacity than areas in the north of Corangamite Shire. Key opportunities for tourism development in the coastal areas of Corangamite Shire include an integrated resort, walker accommodation and internationally branded accommodation as well as nature based tourism activities, geothermal, wellness and local produce.

In the northern areas of Corangamite Shire there is unlikely to be great demand for large scale tourist facilities however opportunities include self contained accommodation, tourist park

accommodation, water based activities and events on the Volcanic lakes, outdoor education facilities and food, dining and local produce.

Review of the planning framework and capacity of the key tourist towns such as Port Campbell, Princetown and Timboon in the south of the Shire highlight very little opportunity for tourism development within existing urban land. In Port Campbell there are only two sites which can accommodate tourism product of any scale. A permit exists for a hotel on one of these sites, whilst the other has been earmarked for future tourism development. An integrated resort, walker accommodation and other wilderness/ nature based accommodation cannot be accommodated within the existing townships. Rural land is required to accommodate these facilities.

A review of rural zones highlights that existing rural zones including the Farming Zone and Rural Conservation Zone do not support these land uses. Therefore rezoning of specific sites in the rural areas to a zone which facilitates tourism development is required.

In the north of the Shire, most townships can generally support the tourism development opportunities identified, particularly accommodation and tourist retail and dining. Many of these activities should be located within the core commercial precincts of Camperdown, Terang, Derrinallum and Skipton, through redevelopment of underutilised sites. There is however some requirement to identify rural land to accommodate tourism development in Timboon, around Lake Purrumbete and around Skipton, in order to link to the natural settings and attractions of these locations.

In addition land in close proximity to the coast is also required to be rezoned to support tourism development as currently there is very little development opportunity due to Farming Zone restrictions and limitations for development within existing coastal townships. These sites need to be identified with regard to commercial development criteria and also assessed against the planning framework.

PART B IMPLEMENTATION



9. IDENTIFICATION OF POTENTIAL TOURISM DEVELOPMENT SITES

9.1. INTRODUCTION

9.1.1. BACKGROUND

This section of the report has been prepared to identify specific sites which have the highest potential for tourism development based on a set of specific criteria developed through the course of this project. These match with developer requirements and visitors expectations of tourist facilities.

The shortlisted sites identified in this section of the report have been recommended with respect to the following commercial development assessment criteria and also through consultation with landowners.

The sites shortlisted are categorised as coastal and northern Corangamite Shire sites (non coastal).

9.1.2. TOURISM DEVELOPMENT PRECINCT ASSESSMENT CRITERIA

The following principles have been developed to identify the sites suited to review for tourism use.

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

1. Is in close proximity to existing tourism product and infrastructure nodes or in a location which exhibits tourism development potential. For example undeveloped high quality natural attractions.
2. Is in an area exhibiting existing tourist visitation and opportunity for increased tourism activity through further tourism product development.
3. Provides opportunity for links to nature based tourism, walks, waterways, State and National Parks.
4. Is within proximity to an existing township. This will ensure that any rural tourism development can draw on existing labour pools and existing local services.

SITE ATTRIBUTES

5. Provides an attractive setting, either rural or coastal, and provides the opportunity for tourism development to capture significant rural or coastal views and vistas.
6. Is elevated more than 5 metres above sea level with preference to areas which are not subject to predictable adverse environmental processes and effects including storm surges, river and coastal flooding or landslip.
7. Does not affect the existing views and landscape, or the site allows for a potential tourism facility to be designed in a way which is discrete and sensitive to the existing environment.

ACCESS

8. Has direct access to a major sealed road or touring route.

9.1.3. NORTHERN SHIRE ANALYSIS

The following tourism precincts were reviewed for tourism development potential in Northern Corangamite Shire. These are identified in the map on the following page.

- Skipton and Mount Widderin;
- Mount Elephant, Derrinallum;
- Lake Purrumbete;
- Glenormiston College;
- Timboon and surrounds;
- Camp Cooriemungle.

9.1.4. COASTAL PRECINCT ANALYSIS

The following coastal precincts were reviewed for tourism development purposes. Precincts were matched against the above assessment criteria to identify potential sites for further consideration. The map on the following page highlights the location of coastal precincts/sites considered:

- Peterborough East;
- Port Campbell West;
- Loch Ard;
- Glenample;
- Princetown East;
- Moonlight Head.

An assessment of the precincts against the development criteria follows. This provides the justification for the identified precincts and sites against the tourism development criteria.

The shortlisted sites within each precinct are reviewed in the following section against the planning framework.

NORTHERN TOURISM INVESTIGATION PRECINCTS

CAMPERDOWN AND SURROUNDS



4 Lake Purumbete

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Close proximity to Lake Purumbete
- ⇒ Excellent characteristics for fishing and boating
- ⇒ Existing accommodation businesses including self contained cabins and a caravan park at Lake Purumbete.

SITE ATTRIBUTES

- ⇒ Sites have aspect and views over the lake;
- ⇒ All sites identified have direct access to the lake;
- ⇒ The sites include areas which are level and developable.
- ⇒ A sealed road circulates around the lake

TOURISM OPPORTUNITIES

- ⇒ Self contained accommodation
- ⇒ Boat charters
- ⇒ Improved infrastructure: jetties, car parking and boat ramp
- ⇒ Event/ function facility

5. Glenormiston College

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Close proximity to Terang and Camperdown
- ⇒ Existing venue for education and events

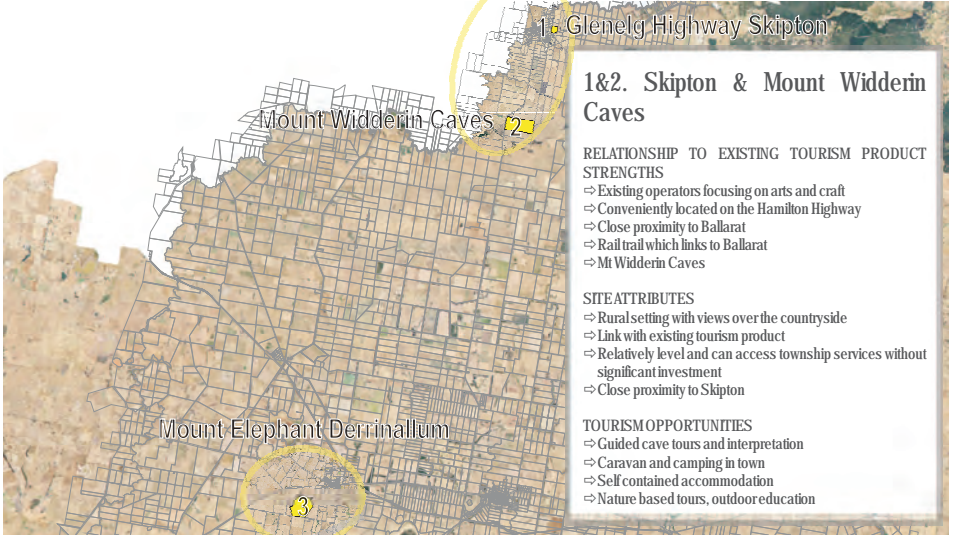
SITE ATTRIBUTES

- ⇒ high quality gardens and heritage buildings
- ⇒ Site has a number of existing buildings which can be utilised further for tourism purposes
- ⇒ The site has been an agricultural college for many years

TOURISM OPPORTUNITIES

- ⇒ Business conferences
- ⇒ Weddings
- ⇒ Events
- ⇒ Range of self contained and lodge accommodation

SKIPTOWN AND DERRINALLUM



1&2. Skipton & Mount Widderin Caves

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Existing operators focusing on arts and craft
- ⇒ Conveniently located on the Hamilton Highway
- ⇒ Close proximity to Ballarat
- ⇒ Rail trail which links to Ballarat
- ⇒ Mt Widderin Caves

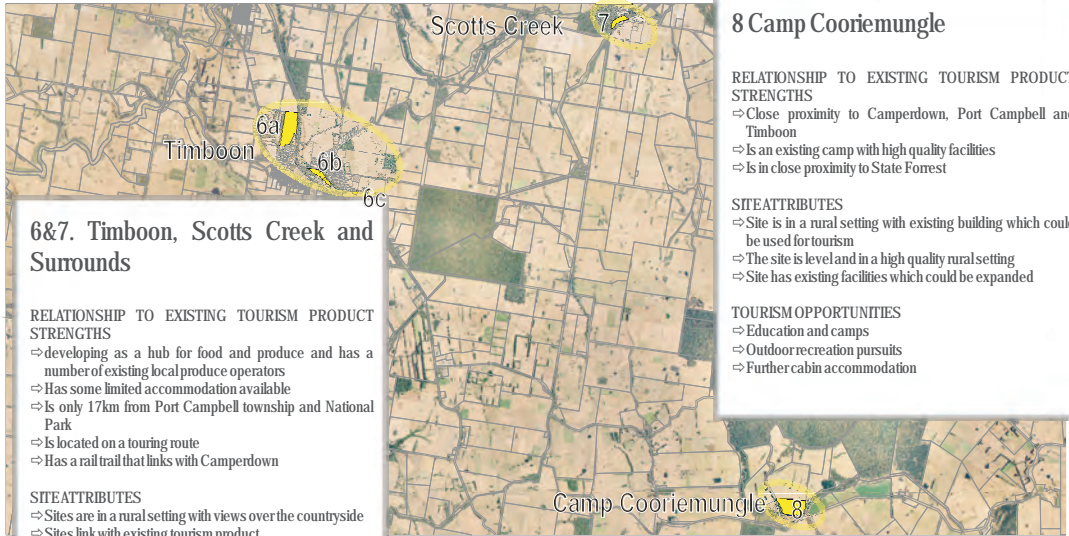
SITE ATTRIBUTES

- ⇒ Rural setting with views over the countryside
- ⇒ Link with existing tourism product
- ⇒ Relatively level and can access township services without significant investment
- ⇒ Close proximity to Skipton

TOURISM OPPORTUNITIES

- ⇒ Guided cave tours and interpretation
- ⇒ Caravan and camping in town
- ⇒ Self contained accommodation
- ⇒ Nature based tours, outdoor education

TIMBOON AND SURROUNDS



8 Camp Coorimungle

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Close proximity to Camperdown, Port Campbell and Timboon
- ⇒ Is an existing camp with high quality facilities
- ⇒ Is in close proximity to State Forrest

SITE ATTRIBUTES

- ⇒ Site is in a rural setting with existing building which could be used for tourism
- ⇒ The site is level and in a high quality rural setting
- ⇒ Site has existing facilities which could be expanded

TOURISM OPPORTUNITIES

- ⇒ Education and camps
- ⇒ Outdoor recreation pursuits
- ⇒ Further cabin accommodation

6&7. Timboon, Scotts Creek and Surrounds

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ developing as a hub for food and produce and has a number of existing local produce operators
- ⇒ Has some limited accommodation available
- ⇒ Is only 17km from Port Campbell township and National Park
- ⇒ Is located on a touring route
- ⇒ Has a rail trail that links with Camperdown

SITE ATTRIBUTES

- ⇒ Sites are in a rural setting with views over the countryside
- ⇒ Sites link with existing tourism product

TOURISM OPPORTUNITIES

- ⇒ Self contained accommodation
- ⇒ Produce sales and extended retail

3. Mt Elephant

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

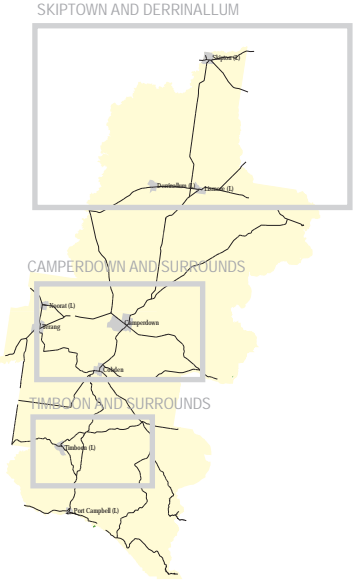
- ⇒ Located on the Hopkins Highway
- ⇒ Close proximity to Derrinallum
- ⇒ Geological natural feature of State significance
- ⇒ Provides a focal point for tourism in the northern part of the Shire
- ⇒ Attracts niche market segments, from domestic and international markets

SITE ATTRIBUTES

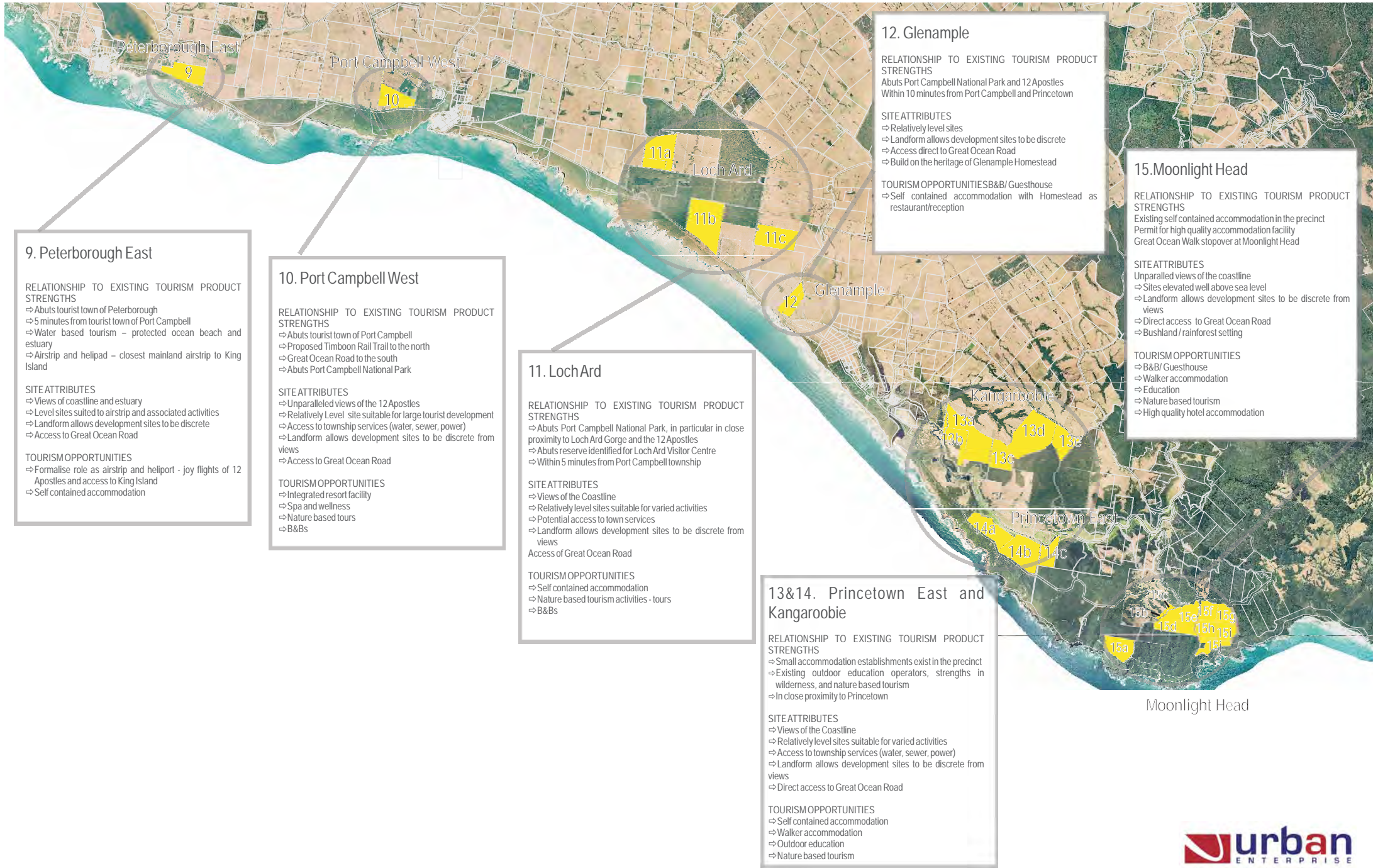
- ⇒ Rural setting with outstanding views over the countryside;
- ⇒ Is an existing tourism product under development
- ⇒ Highly visible geological feature
- ⇒ Close proximity to Derrinallum

TOURISM OPPORTUNITIES

- ⇒ Guided walks and interpretation
- ⇒ Research related activities
- ⇒ Education/ school excursions



COASTAL TOURISM INVESTIGATION PRECINCTS



9. Peterborough East

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Abuts tourist town of Peterborough
- ⇒ 5 minutes from tourist town of Port Campbell
- ⇒ Water based tourism – protected ocean beach and estuary
- ⇒ Airstrip and helipad – closest mainland airstrip to King Island

SITE ATTRIBUTES

- ⇒ Views of coastline and estuary
- ⇒ Level sites suited to airstrip and associated activities
- ⇒ Landform allows development sites to be discrete
- ⇒ Access to Great Ocean Road

TOURISM OPPORTUNITIES

- ⇒ Formalise role as airstrip and heliport - joy flights of 12 Apostles and access to King Island
- ⇒ Self contained accommodation

10. Port Campbell West

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Abuts tourist town of Port Campbell
- ⇒ Proposed Timboon Rail Trail to the north
- ⇒ Great Ocean Road to the south
- ⇒ Abuts Port Campbell National Park

SITE ATTRIBUTES

- ⇒ Unparalleled views of the 12 Apostles
- ⇒ Relatively Level site suitable for large tourist development
- ⇒ Access to township services (water, sewer, power)
- ⇒ Landform allows development sites to be discrete from views
- ⇒ Access to Great Ocean Road

TOURISM OPPORTUNITIES

- ⇒ Integrated resort facility
- ⇒ Spa and wellness
- ⇒ Nature based tours
- ⇒ B&Bs

11. Loch Ard

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Abuts Port Campbell National Park, in particular in close proximity to Loch Ard Gorge and the 12 Apostles
- ⇒ Abuts reserve identified for Loch Ard Visitor Centre
- ⇒ Within 5 minutes from Port Campbell township

SITE ATTRIBUTES

- ⇒ Views of the Coastline
- ⇒ Relatively level sites suitable for varied activities
- ⇒ Potential access to town services
- ⇒ Landform allows development sites to be discrete from views
- ⇒ Access of Great Ocean Road

TOURISM OPPORTUNITIES

- ⇒ Self contained accommodation
- ⇒ Nature based tourism activities - tours
- ⇒ B&Bs

12. Glenample

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Abuts Port Campbell National Park and 12 Apostles
- ⇒ Within 10 minutes from Port Campbell and Princetown

SITE ATTRIBUTES

- ⇒ Relatively level sites
- ⇒ Landform allows development sites to be discrete
- ⇒ Access direct to Great Ocean Road
- ⇒ Build on the heritage of Glenample Homestead

TOURISM OPPORTUNITIES B&B/ Guesthouse

- ⇒ Self contained accommodation with Homestead as restaurant/reception

15. Moonlight Head

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Existing self contained accommodation in the precinct
- ⇒ Permit for high quality accommodation facility
- ⇒ Great Ocean Walk stopover at Moonlight Head

SITE ATTRIBUTES

- ⇒ Unparalleled views of the coastline
- ⇒ Sites elevated well above sea level
- ⇒ Landform allows development sites to be discrete from views
- ⇒ Direct access to Great Ocean Road
- ⇒ Bushland/ rainforest setting

TOURISM OPPORTUNITIES

- ⇒ B&B/ Guesthouse
- ⇒ Walker accommodation
- ⇒ Education
- ⇒ Nature based tourism
- ⇒ High quality hotel accommodation

13&14. Princetown East and Kangarooobie

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- ⇒ Small accommodation establishments exist in the precinct
- ⇒ Existing outdoor education operators, strengths in wilderness, and nature based tourism
- ⇒ In close proximity to Princetown

SITE ATTRIBUTES

- ⇒ Views of the Coastline
- ⇒ Relatively level sites suitable for varied activities
- ⇒ Access to township services (water, sewer, power)
- ⇒ Landform allows development sites to be discrete from views
- ⇒ Direct access to Great Ocean Road

TOURISM OPPORTUNITIES

- ⇒ Self contained accommodation
- ⇒ Walker accommodation
- ⇒ Outdoor education
- ⇒ Nature based tourism

Moonlight Head

9.2. NORTHERN CORANGAMITE INVESTIGATION PRECINCTS

9.2.1. SKIPTON

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Skipton has the following attributes in relation to links to existing tourism product:

- Has existing operators focusing on arts and craft;
- Is conveniently located on the Hamilton Highway;
- Is in close proximity to Ballarat;
- Has a rail trail which links to Ballarat;
- Mt Widderin Caves. An amazing natural attraction on private property, open to the public by appointment.

PRECINCT ATTRIBUTES

The following precinct attributes make Skipton and surrounds conducive to tourism development:

- Sites are in a rural setting with views over the countryside;
- Sites link with existing tourism product;
- Sites are relatively level and can access township services without significant investment.

ACCESS

- The sites are in close proximity to Skipton township and have excellent infrastructure and access.

TOURISM OPPORTUNITIES

The precinct provides opportunities for the following tourism activities:

- Guided cave tours and interpretation;
- Caravan and camping in town;
- Self contained accommodation.

9.2.2. MOUNT ELEPHANT, DERRINALLUM

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- Located on the Hamilton Highway;
- Close proximity to Derrinallum;
- Geological Natural feature of State significance;
- Provides a focal point for tourism in the northern part of the Shire;
- Appeal to niche market segments, from domestic and international origin.

PRECINCT ATTRIBUTES

The following precinct attributes make Mount Elephant and surrounds conducive to tourism development:

- Site is in a rural setting with outstanding views over the countryside;
- Site is an existing tourism product under development - there are plans for the development of interpretation and day visitor facilities.

ACCESS

- The site is in close proximity to Derrinallum and has direct access to a sealed highway.

TOURISM OPPORTUNITIES

The site provides opportunities for the following tourism activities:

- Guided walks and interpretation;
- Research related activities;
- Education/ school excursions;
- Events.

9.2.3. LAKE PURRUMBETE

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Lake Purrumbete has the following attributes in relation to links to existing tourism product:

- Camperdown is located in close proximity to Lake Purrumbete;
- Lake Purrumbete has excellent characteristics for fishing and boating;
- There are existing accommodation businesses including self contained cabins and a caravan park at Lake Purrumbete.

PRECINCT ATTRIBUTES

The following precinct attributes make Lake Purrumbete sites conducive to tourism development:

- Sites have aspect and views over the lake;
- All sites identified have direct access to the lake;
- The sites include areas which are level and developable.

ACCESS

- A sealed road circulates around most of the lake, which all identified sites have access to.

TOURISM OPPORTUNITIES

The precinct provides opportunities for the following tourism activities:

- Self contained accommodation/ fishing lodge;
- Boat charters/boat hire;
- Improved infrastructure: jetties, car parking and boat ramp.

- Fishing guides;
- Bird watching;
- Event/ function facility.

9.2.4. TIMBOON, SCOTTS CREEK AND SURROUNDS

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Timboon has the following attributes in relation to links to existing tourism product:

- Is developing as a hub for food and produce and has a number of existing local produce operators;
- Has some limited accommodation available;
- Is only 17km from the Port Campbell township and National Park;
- Is located on a touring route;
- Has a rail trail that links with Camperdown.

PRECINCT ATTRIBUTES

The following precinct attributes make Timboon and surrounds conducive to tourism development:

- Sites are in a rural setting with views over the countryside;
- Sites link with existing tourism product;
- Sites are relatively level and can access township services without significant investment.

ACCESS

- The sites abut the existing township and have excellent infrastructure and access.

TOURISM OPPORTUNITIES

The precinct provides opportunities for the following tourism activities:

- Self contained accommodation;
- Produce sales and extended retail;
- Caravan park;
- High quality dining/ cafes/ functions.

9.2.5. GLENORMISTON COLLEGE

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- Close proximity to Terang and Camperdown;
- Existing venue for education and events;

PRECINCT ATTRIBUTES

The following precinct attributes make Glenormiston College conducive to tourism development:

- Site is in a rural setting with high quality gardens and heritage buildings;
- Site has a number of existing buildings which can be utilised further for tourism purposes;
- The site has been an agricultural college for many years (currently managed by South West TAFE).

ACCESS

- The site is in close proximity to Terang and Camperdown;

TOURISM OPPORTUNITIES

The site provides opportunities for the following tourism activities:

- Business conferences;
- Weddings;
- Events;
- Self contained and lodge accommodation (up to 120 existing beds).

9.2.6. CAMP COORIEMUNGLE

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

- 15 minutes from Port Campbell and Timboon;
- Is an existing privately owned 140 bed camp with high quality facilities;
- Is in close proximity to State Forrest on 44 acres.

PRECINCT ATTRIBUTES

The following precinct attributes make Camp Cooliemungle conducive to tourism development:

- Site is in a rural setting with existing buildings which could be used for tourism;
- The site is level and in a high quality rural setting;
- Site has existing facilities which could be expanded.

ACCESS

- The site is in close proximity to Port Campbell and Camperdown;

TOURISM OPPORTUNITIES

The site provides opportunities for the following tourism activities:

- Education and camps;
- Outdoor recreation pursuits;
- Further cabin accommodation.

9.3. REVIEW OF COASTAL TOURISM DEVELOPMENT PRECINCTS

9.3.1. PETERBOROUGH EAST

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Peterborough East has the following attributes in relation to links to existing tourism product.

- Peterborough East is 2 minutes from the Peterborough Township and 5 minutes from Port Campbell.
- Peterborough East provides opportunity for water based activities; protected ocean beach and estuary.
- Peterborough East provides the only airstrip along the Corangamite Coastline, highlighting tourism development opportunities for higher yield tourism.
- Helicopter tours operate out of the precinct.
- The precinct provides one of the closest mainland air access to King Island. There may be other tourist retail opportunities which link to King Island product.

PRECINCT ATTRIBUTES

The following precinct attributes make Peterborough East conducive to tourism development:

- Sites within Peterborough East provide views of the coastline and estuary.
- The landforms at Peterborough East allow for tourism development to be discretely located without affecting views from the Great Ocean Road.
- Land at Peterborough East, whilst being elevated also provides large relatively level sites suited to air transport.

ACCESS

- Private land at Peterborough East can be accessed from the Great Ocean Road.

TOURISM OPPORTUNITIES

The precinct provides opportunities for the following tourism activities:

- Heliport and airstrip for tourism related activities including light aeroplane flights to King Island and joy flights over the Twelve Apostles;
- Self contained accommodation;
- Geothermal potential.

9.3.2. PORT CAMPBELL WEST

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Port Campbell West has the following attributes in relation to links to existing tourism product.

- Port Campbell West is within 2 minutes of Port Campbell township, where there are a number of existing tourism businesses and tourism product.
- The proposed Port Campbell-Timboon Trail traverses in close proximity to Port Campbell West.

- Port Campbell National Park is in close proximity to the Port Campbell West precinct.

PRECINCT ATTRIBUTES

The following site attributes make Port Campbell West conducive to tourism development:

- Sites within Port Campbell West provide unparalleled views of coast.
- The landforms at Port Campbell West allows for tourism development to be discretely located without significantly affecting views from the Great Ocean Road.
- Land at Port Campbell West, whilst being elevated also provides large relatively level sites which may be suited to larger scale tourist development.
- The precinct has access to reticulated water, sewer and electricity which services the Port Campbell Township.

ACCESS

- Private land at Port Campbell West can be accessed from the Great Ocean Road or Curdievale Road.

TOURISM OPPORTUNITIES

This precinct is suited to large scale accommodation such as an integrated resort facility. Its proximity to Port Campbell, unparalleled views of the Twelve Apostles, landform and access to services provide a unique opportunity along the coastline for development of this scale.

9.3.3. LOCH ARD AND GLENAMPLE

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Loch Ard Gorge Precinct has the following attributes in relation to links to existing tourism product.

- Loch Ard Gorge is one of the key attractions within Port Campbell National Park, and provides a unique opportunity within Port Campbell National Park to access an ocean beach.
- Loch Ard Gorge Precinct has a strong link with European heritage with Glen Ample Homestead as well as the Shipwrecks.
- Parks Victoria is planning a major visitor interpretive centre for the precinct, which will provide a new drawcard within Port Campbell National Park.
- Over 2 million visitors pass through Port Campbell National Park annually.
- The Loch Ard Gorge Precinct is within 5 minutes of Port Campbell township.
- A refurbished Glenample Homestead can provide a new attraction in the area.

PRECINCT ATTRIBUTES

The following attributes make the Loch Ard Precinct conducive to tourism development:

- Sites in the Loch Ard Precinct provide rare opportunities for tourism development on private land in close proximity to Loch Ard Gorge and the proposed interpretive centre.
- The Loch Ard Precinct has a number of sites which provide views of the Port Campbell Coastline.

- There may be opportunity to utilise services and infrastructure associated with the proposed Loch Ard Visitor Interpretive Centre;
- There is opportunity to utilise Glenample Homestead for tourism activity.

ACCESS

- Properties at Loch Ard Gorge Precinct have direct access to the Great Ocean Road.

TOURISM OPPORTUNITIES

The attributes of the precinct provide the following tourism development opportunities:

- B&Bs;
- Self contained accommodation;
- Homestead Accommodation/ Rural Tourism Experience.
- Geothermal opportunities.

9.3.4. PRINCETOWN EAST

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Prinetown East has the following attributes in relation to links to existing tourism product.

- The rural area which makes up Prinetown East already has a number of small scale tourism developments including B&Bs and outdoor education camps.
- The precinct has a unique setting suited to nature based activities including water based activities and links to the Great Ocean Walk which traverses through the area.
- The precinct includes private land between the Old Great Ocean Road and New Great Ocean Road and is accessible to both.
- Prinetown East is 5 minutes drive from Prinetown township.

PRECINCT ATTRIBUTES

The following site attributes make Prinetown East conducive to tourism development:

- Sites in Prinetown East provide rare opportunities for tourism development on private land south of the Great Ocean Road.
- Sites in Prinetown East are elevated high above sea level, many of which have views of the coast and rural hinterland.
- The landforms and vegetation cover at Prinetown East allow for tourism development to be discretely located below ridgelines and vegetation. A number of sites throughout the precinct can be accommodated and still maintain a sense of isolation, natural setting.

ACCESS

- Properties at Prinetown East have direct access to the Great Ocean Road.

TOURISM OPPORTUNITIES

The precinct is suited to the following tourism development opportunities:

- Self contained eco cabins;
- Walker accommodation;
- Outdoor education related activities.

9.3.5. MOONLIGHT HEAD PRECINCT

RELATIONSHIP TO EXISTING TOURISM PRODUCT STRENGTHS

Moonlight Head has the following attributes in relation to links to existing tourism product.

- Moonlight Head already has a number of small scale tourism developments including self contained accommodation. A planning permit exists for a high quality boutique hotel at Moonlight Head.
- The Great Ocean Walk traverses through or next to a number of private properties in Moonlight Head.
- A large number of visitors pass through Moonlight Head on their way to Port Campbell National Park;
- Moonlight Head is 10 minutes from the small tourist town of Princetown.

PRECINCT ATTRIBUTES

The following site attributes make Moonlight Head conducive to tourism:

- Moonlight Head precinct has sites which provide rare opportunities for tourism development on private land south of the Great Ocean Road.
- Moonlight Head precinct is elevated above sea level, many of which have unparalleled views of coast.
- The landforms and vegetation cover at Moonlight Head allows for tourism development to be discretely located without affecting views from the Great Ocean Road.
- Private land at Moonlight Head includes a number of sites that are steep and not considered prime farming land. Many of the sites are also densely vegetated.

ACCESS

- Private land at Moonlight Head has direct access to the Great Ocean Road.

TOURISM OPPORTUNITIES

The precinct is suited to the following tourism development opportunities:

- Self contained eco cabins;
- Walker accommodation;
- Boutique hotel;
- Outdoor education related activities.

10. SITE ASSESSMENT

10.1. THE PURPOSE OF THE SITE ASSESSMENT

The purpose of this assessment is to undertake a detailed planning review of shortlisted sites identified as being potentially appropriate for tourism development by Urban Enterprise as part of the Corangamite Tourism Opportunities Study and recommend appropriate planning scheme changes required.

The shortlisted sites were identified as a result of a detailed review of the market and product type in the Existing Situation Paper (April 2010). The sites have been identified based on their potential to meet the demand for tourism product in the Shire.

Many of the shortlisted sites are currently heavily constrained in terms of future development by existing land use zoning, which in most cases prohibits tourism-related activities. In addition, many sites, particularly those along the coast, are affected by environment and landscape overlays which seek to protect landscapes and other attributes of significance.

In order to enable appropriate tourism development, selected sites may need to be rezoned and other controls applying to sites reviewed. The purpose of this assessment is to identify the existing controls that apply to each site, as well as other constraints, and recommend changes to the planning framework based on the detailed consideration of each site and its particular attributes.

10.2. METHOD

The assessment has followed a three-step process based on the following stages:

1. INFORMATION GATHERING AND DESKTOP ANALYSIS

The first step involved the collection of data to identify the existing planning scheme controls and other constraints applying to the shortlisted sites. The following sources were used:

- Corangamite Shire Planning Scheme
- Corangamite Shire GIS Data including aerial photography
- Aboriginal Affairs Victoria Map of Victoria - Areas of Cultural Heritage Sensitivity (<http://www.aboriginalaffairs.vic.gov.au/>)
- Heritage Victoria - Victorian Heritage Database (<http://vhd.heritage.vic.gov.au/>)
- Department of the Environment, Water, Heritage and the Arts - Register of the National Estate (<http://www.environment.gov.au/heritage/places/rne/index.html>)
- Great Ocean Road Region Landscape Assessment Study, 2003
- Various other websites/background documents specific to particular sites that are referenced throughout the assessment.

2. SITE SURVEY

A survey of each shortlisted site was carried out in July 2010. A number of inaccessible sites were accessed with permission from landowners, while others were able to be reviewed from public

roadsides and other key viewing locations. The Site Survey confirmed the data collected through the Desktop Analysis and provided the opportunity to assess detailed issues related to the siting and design of potential future built form.

3. FINDINGS

The findings from Stages 1 and 2 were documented in the Site Assessment Framework and in this report.

10.3. SITE ASSESSMENT FRAMEWORK

The Site Assessment Framework (see Appendix 1) took into account the following factors:

- Description of the site / precinct
- Existing planning scheme controls including zones and overlays, as well as any reference to particular locations or land use types in the Municipal Strategic Statement (MSS) or Local Planning Policies (LPPs);
- Environmental or ecological constraints on or surrounding the site;
- Known cultural heritage issues and sites;
- Landscape or scenic values, identified through the site visit as well as through a review of existing documentation;
- Proximity to existing townships and their services;
- Existing or available infrastructure, including road and transport access as well as other utilities.

For each site, recommendations are made to retain or amend the planning framework based on an assessment of the above factors. Potential land uses and activities were identified by Urban Enterprise based on an analysis of demand for tourism product.

For each site, recommendations are made to retain or amend the planning framework based on an assessment of the above factors. Potential land uses and activities were identified by Urban Enterprise based on an analysis of demand for tourism product.

10.4. POLICY CONTEXT

10.4.1. BACKGROUND DOCUMENTS AND POLICIES

The Existing Situation Paper (April 2010) provides an analysis of the following documents from a tourism perspective:

- Great Ocean Road Region Land Use and Transport Strategy 2004
- Regional Tourism Action Plan 2009-2012
- Great South Coast Sustainable Investment and Development Snapshot 2008
- The Value of Parks - Port Campbell, Grampians, Wilson Promontory
- Victorian Trails Strategy 2005-2010
- Victoria's Geothermal and Natural Mineral Water Tourism Investment Opportunities
- Environmentally Sustainable Tourism Strategic Plan 2009-2012

- Victoria's Nature Based Tourism Strategy
- Victorian Coastal Strategy 2008
- Corangamite Economic Development Strategy
- Corangamite Shire Tourism Strategy 2001- 2011

In addition, the following documents have been used as an input to the Site Assessment Framework:

GREAT OCEAN ROAD REGION LANDSCAPE ASSESSMENT STUDY, 2003

The Great Ocean Road Region Landscape Assessment Study (GORRLAS) was undertaken as part of the overall Great Ocean Road Region Strategy and used a sound and consistent methodology to assess the character of landscapes and the way in which various types of development could be managed in different landscape types.

GORRLAS provides Precinct Development Principles for the entire Study Area, which set out guidelines for the siting and design of buildings and structures as well as guidelines for vegetation, materials, infrastructure and signage.

The Study recommended that the two existing Significant Landscape Overlay schedules (SLO1 and SLO3) be reviewed to take into account the findings of the Study and to better tailor the schedules to each landscape. In addition, it recommended that two additional Significant Landscape Overlays be applied to the Princetown Estuarial Landscape and the Moonlight Head Coastal Landscape. Council is currently pursuing the implementation of these recommendations.

CULTURAL HERITAGE SENSITIVITY MAPPING, ABORIGINAL AFFAIRS VICTORIA

Under the Aboriginal Heritage Act 2006 a Cultural Heritage Management Plan is required if all or part of the proposed activity is in an area of cultural heritage sensitivity, and all, or part of the activity is a high impact activity. The AAV website provides maps which identify areas of cultural heritage sensitivity, as prescribed in Part 2, Division 3 of the Aboriginal Heritage Regulations 2007. The maps provide indicative information about the location and extent of areas of cultural heritage sensitivity. The maps have been used to identify areas of cultural heritage sensitivity located within the shortlisted sites. Decisions about the need to prepare a Cultural Heritage Management Plan in relation to a proposed activity should be made with reference to the Aboriginal Heritage regulations.

DESIGN GUIDELINES FOR NATURE-BASED TOURISM (DRAFT), 2009

The purpose of the Design Guidelines for Nature-Based Tourism is to "facilitate investment in quality accommodation and related facilities that support nature-based tourism on public or private lands".

Given that the landscape of the Shire provides one of its greatest attractions, tourism development should aim to reduce its impact on the environment and the landscape. The Guidelines provide a useful resource in the design of buildings as well as other matters for landowners and designers to consider.

10.4.2. PLANNING SCHEME

MUNICIPAL STRATEGIC STATEMENT

21.03 VISION AND STRATEGIC FRAMEWORK PLAN

Clause 21.03 seeks to provide a vision and key strategic directions for future land use planning and sustainable development of the Shire. This is based on a number of objectives including:

- the sustainable management and protection of natural resources,
- integrated coastal management and protection of natural processes, visual qualities and environmental values of the coast,
- protection and enhancement of places of natural and cultural heritage,
- quality tourism development based on the environmental and cultural qualities of the Shire,
- and efficient, environmentally friendly infrastructure.

Clause 21.03 specifically mentions the need to protect the coastal and landscape environment along the Great Ocean Road including Port Campbell National Park. This is identified as an internationally significant coastline.

21.04 OBJECTIVES, STRATEGIES AND IMPLEMENTATION

Clause 21.04 discusses the existing situation, issues and proposed direction for settlement, environment and economic development in the Shire.

The Clause notes that the Shire contains landscapes of the highest visual quality which is why it is apt for tourism and recreational use. It highlights that one of the principal activities of tourists visiting the Shire is scenic drives between the town centres and along the Great Ocean Road. Various land forms and vegetation including lake areas and volcanic cones contribute to the visual quality of the area.

LOCAL PLANNING POLICIES

22.02 ENVIRONMENT

Clause 22.02 is concerned with the long-term sustainable care and management of the Shire's resource base. It seeks to avoid erosion, particularly along the Great Ocean Road, ensure biological diversity and protect wetland areas, lakes and natural and cultural heritage.

22.03-4 TOURIST USE AND DEVELOPMENT

Clause 22.03-4, located under the heading Economic Development, seeks to support and encourage quality tourist development whilst considering the landscape and heritage values of areas. It states that it is local policy to design and site buildings and works with regard to the natural and built environment. This includes ensuring height, scale, mass and colour are compatible with the environment.

22.04 PARTICULAR USE AND DEVELOPMENT

Clause 22.04 provides guidance on particular use and development in the areas of:

- Building Lines and Height
- Dams
- Highway Development

- Industrial Development
- Intensive Animal Husbandry
- Sheds and Outbuildings

ZONES

The Existing Situation Paper (Urban Enterprise, April 2010) provides an analysis of the Planning and Development Framework, which identifies constraints within the planning framework that present barriers to investment. This examines at the various zones that apply to the Shire in areas where demand exists for tourism product. Table 17 identifies all tourism-related uses and highlights whether the use does not require a permit, requires a permit, or is prohibited under the following zones:

- Farming Zone
- Rural Living Zone
- Rural Conservation Zone
- Rural Activity Zone
- Business 1 Zone
- Residential 1 Zone

EXISTING ZONES

All shortlisted sites are currently within the Farming Zone or the Rural Conservation Zone. As identified by Urban Enterprise, these are particularly prohibitive in terms of tourism development.

The purpose and use of these zones is outlined in Using Victoria's Planning System (DPCD). The document provides the following summaries of each zone.

FARMING ZONE:

The Farming Zone is the main zone to be applied in rural areas. It encourages the retention of productive agricultural land and the use and development of land based on comprehensive and sustainable land management practices and infrastructure provision. The zone provides a minimum lot size of 40 hectares unless an alternative is specified in a schedule to the zone. The creation of smaller lots is prohibited unless the subdivision is the re-subdivision of existing lots or the creation of a small lot for a utility installation.

RURAL CONSERVATION ZONE:

The Rural Conservation Zone is designed to protect and enhance the natural environment for its historic, archaeological, scientific, landscape, faunal habitat and cultural values. Agriculture is allowed provided it is consistent with the environmental and landscapes values of the area. This zone could also be applied to rural areas degraded by environmental factors such as salinity or erosion. A schedule requires specific conservation values to be stated. The zone provides a minimum lot size of 40 hectares unless an alternative is specified in a schedule to the zone. The creation of smaller lots is prohibited unless the subdivision is the re-subdivision of existing lots or the creation of a small lot for a utility installation.

PROPOSED ZONES

In order to facilitate or encourage tourism development to meet identified demand, Council could consider the rezoning of selected appropriate sites or parts of sites (in conjunction with a subdivision) to either the Rural Activity Zone or the Special Use Zone.

Using Victoria's Planning System provides the following statements for the Rural Activity and Special Use zones:

Rural Activity Zone:

The Rural Activity Zone is designed to be applied to areas where agricultural activities and other land uses can co-exist. A wider range of tourism, commercial and retail uses may be considered in the zone. Agriculture has primacy, but other uses may be established if they are compatible with the agricultural, environmental and landscape qualities of the area. A minimum lot size must be specified in a schedule to the zone. The creation of smaller lots is prohibited unless the subdivision is the re-subdivision of existing lots or the creation of a small lot for a utility installation.

Special Use Zone:

This zone provides for the use of land for specific purposes. The purposes and the land use requirements are specified in a schedule to the zone. This allows detailed land use requirements to be prescribed for a particular site. Development conditions (where they are necessary) should still be set out in a permit rather than the scheme. Exemptions from notification and review can be given if desired. Note that the Ministerial Direction on the Form and Content of Planning Schemes includes some specific requirements about this zone and the Planning Practice Note Using the Special Use Zone explains the use of this zone in more detail.

The Practice Note Using the Special Use Zone, states that the zone can be considered when an appropriate combination of the other available zones, overlays and local policies cannot give effect to the desired objectives or requirements.

OVERLAYS

A number of shortlisted sites are affected by existing or proposed overlays. These include:

SIGNIFICANT LANDSCAPE OVERLAY (SLO)

The SLO currently applies to the volcanic landscapes of the Shire (SLO1) and the Great Ocean Road Landscape Area (SLO3). The purpose of the SLO is to identify significant landscapes and conserve and enhance their character.

The Tourism Opportunities Study is also being undertaken concurrently with the implementation of the recommendations of the Great Ocean Road Landscape Assessment Study. The Study identified two coastal areas of State landscape significance within the Shire of Corangamite and made recommendations to expand and improve the Shire's existing planning scheme controls for significant coastal landscapes.

A number of the shortlisted sites are located within an existing or proposed SLO.

HERITAGE OVERLAY (HO)

The HO applies to specific buildings and landscape features throughout the Shire. The purposes of the HO are to:

- Conserve and enhance heritage places of natural or cultural significance.

- Conserve and enhance those elements which contribute to the significance of heritage places.
- Ensure that development does not adversely affect the significance of heritage places.
- Conserve specifically identified heritage places by allowing a use that would otherwise be prohibited if this will demonstrably assist with the conservation of the significance of the heritage place.

ENVIRONMENTAL SIGNIFICANCE OVERLAY (ESO1)

The purposes of the ESO are to identify areas where the development of land may be affected by environmental constraints and ensure that development is compatible with identified environmental values. ESO1 applies to watercourses, water bodies and wetlands throughout the Shire and affects some of the shortlisted sites.

VEGETATION PROTECTION OVERLAY (VPO1)

The purposes of the VPO are to:

- Protect areas of significant vegetation.
- Ensure that development minimises loss of vegetation.
- Preserve existing trees and other vegetation.
- Recognise vegetation protection areas as locations of special significance, natural beauty, interest and importance.
- Maintain and enhance habitat and habitat corridors for indigenous fauna.
- Encourage the regeneration of native vegetation.

VPO1 applies to a number of sites throughout the Shire, including those contained in Precinct 13: Moonlight Head, recognising the significant and remnant vegetation in that location.

WILDFIRE MANAGEMENT OVERLAY (WMO)

The purposes of the WMO are to:

- Identify areas where the intensity of wildfire is significant and likely to pose a threat to life and property.
- Ensure that development which is likely to increase the number of people in the overlay area:
 - Satisfies the specified fire protection objectives.
 - Does not significantly increase the threat to life and surrounding property from wildfire.
- Detail the minimum fire protection outcomes that will assist to protect life and property from the threat of wildfire.

10.5. SITE 1: 'GLENELG HIGHWAY, SKIPTON'

10.5.1. LOT 2 LP78265, PARISH OF SKIPTON



View of the site from Park Lane

10.5.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site adjoins the Skipton township and is located 53 kilometres west of Ballarat. Skipton is considered to have a number of existing tourism product strengths including its focus on arts and craft, its location on the Ballarat-Skipton Rail Trail and the proximity of the township to the Mount Widderin Caves. The township of Skipton also has a golf course and outdoor swimming pool within walkable distance of the site. The proximity of Skipton to Ballarat and its location on the Glenelg Highway means it is easily accessible and close to a major population centre.

POTENTIAL USES

The analysis by Urban Enterprise Pty Ltd indicates that the location provides opportunities for a caravan park that could also be used for temporary worker accommodation associated with infrastructure projects in the area.

10.5.3. SITE DESCRIPTION

The site is located just outside the north-eastern boundary of the Skipton township, as defined by the Township Structure Plan.

It has an area of just over 15 hectares and is on flat to gently rolling topography, which slopes downwards towards a linear depression that runs from the western boundary to the north-eastern part of the site. The site is visible from both Park Lane and the Glenelg Highway, however existing dwellings located on adjacent sites fronting the Glenelg Highway block views to the site from the Highway for a short distance. The topography of the land would provide the opportunity to locate any development to minimise its visibility from at least one of these roads.

The site is predominantly cleared and undeveloped, with agricultural buildings located at the south-western corner of the site. Scattered vegetation is located along the western boundary.

The site is located opposite a reserve/parkland which contains an outdoor swimming pool and lake. These features enhance the scenic outlook and also provide facilities for potential visitors.

10.5.4. ASSESSMENT FRAMEWORK

SITE AREA: 15 HECTARES

PLANNING SCHEME

Zone	The site is located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlay	The site is not affected by any overlays.
MSS	<p>At Clause 21.01 Municipal Profile, the MSS refers to the township of Skipton as containing an historic townscape.</p> <p>Clause 21.01 also identifies that Central Highlands Water is responsible for water and sewerage in Skipton, (while the majority of the rest of Corangamite is serviced by Wannon Water).</p> <p>At Clause 21.04 Objectives, Strategies and Implementation, the MSS identifies Skipton as 'an attractive rural town located on the Glenelg Highway, 53 kilometres south of Ballarat.'</p> <p>The site is outside the identified Urban Growth Boundary for Skipton as shown on the Township Structure Plan in the MSS, but has been identified as suitable for 'Highway Business' with "well planned and designed" development encouraged. The Structure Plan for Skipton has since been revised and updated but is not yet implemented through the planning scheme. The revised Structure Plan proposes an extension to the town centre boundary, with part of Site 1 included within the boundary. The site is identified for tourism facilities including cabins and a caravan park.</p>
LPP	The site and the township are not mentioned in any local planning policies

ENVIRONMENTAL OR ECOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- The site does not appear to be affected by any ecological constraints.

KNOWN CULTURAL HERITAGE VALUE

- The site is not included in any identified Areas of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).
- The site does not have any identified post-settlement cultural heritage value.

LANDSCAPE OR SCENIC VALUES

- The site does not have any identified landscape or scenic values and has not been the subject of a landscape assessment study.
- The site is surrounded by rural land with a scenic outlook however the site itself is not considered to be of high or significant landscape value. Existing buildings at the south-west corner of the site interrupt views from the north.
- In terms of viewing patterns the site is visible from both the Glenelg Highway and Park Lane however the latter has low pedestrian and traffic levels.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has convenient access to both Park Lane and the Glenelg Highway (Road Zone 1). Both are sealed roads.
- The site adjoins the Skipton township, and therefore should have access to township services including water and sewerage.

10.5.5. PLANNING CONSIDERATIONS

The existing Farming Zone allows Bed and Breakfast facilities for up to six people which would highly restrict the potential of the site to provide accommodation. Other types of accommodation considered suitable for the site are prohibited under the existing zone.

The site is outside the existing Township Boundary as identified in the MSS, however, as discussed, the revised Skipton Structure Plan proposes an extension of the boundary to include part of this site. This proposal is supported based on the proximity of the land to the services of the township and the opportunities it offers for accommodation.

The revised Skipton Structure Plan identifies the south-western portion of the site as a location for a caravan park, as shown in the map below.



10.5.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

The Rural Activity Zone would require a permit for a suitable accommodation facility and would be a more appropriate zone for the site. It would be appropriate for a rezoning of the site to occur immediately or in conjunction with any application for development.

SITING AND DESIGN

It is recommended that the siting of any new development is consistent with the recommendations of the Structure Plan. While the south-eastern part of the site is likely to offer the highest quality views to the north, it is also visible from the Highway and could result in the appearance of sprawl along the Highway.

The south-west portion of the site offers views to the north, yet also provides the opportunity for built form to be at least partially screened in views from existing dwellings fronting the Glenelg Highway and from the Highway itself. Park Lane also offers convenient access to the site away from the Highway.

If development is to occur on this site, the following guidelines should be applied:

- Buildings should be low-scale.
- Buildings should be constructed of materials that complement the surrounding landscape.
- If sited on the south-eastern part of the site, buildings should be well set back from the boundary and screened by vegetation.
- Vegetation screening should be provided along the western boundary.

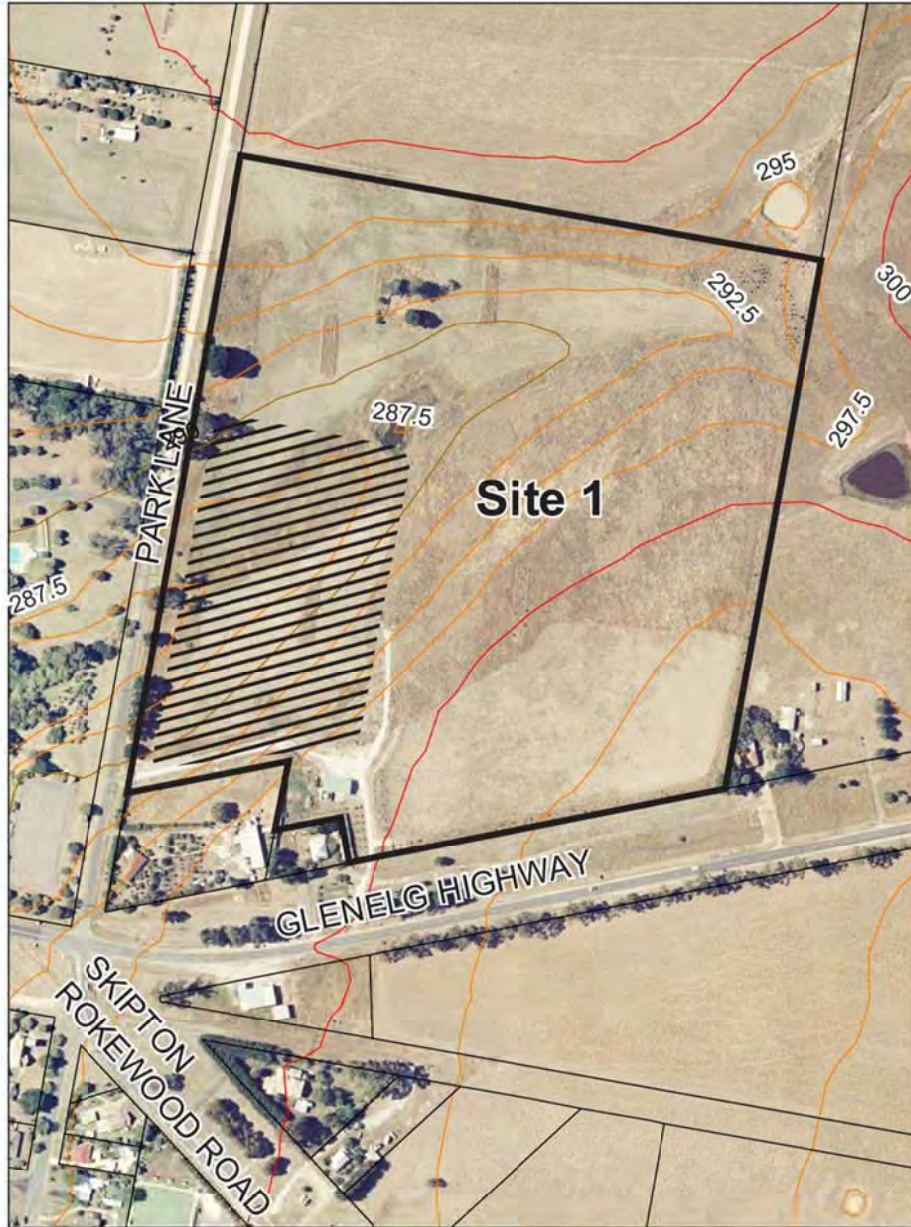
In addition, any new development should meet or consider the requirements and guidelines of:

- The Rural Activity Zone should this be applied.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Nature Based Tourism Guidelines (draft).

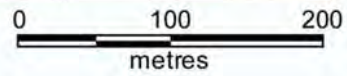
SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The area shown as the 'preferred location for built form' in the map below is rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above and the recommendations of the Skipton Structure Plan (September 2009).
- New development is located within the 'preferred location for built form', shown on the map below.



- Site Boundary
- Preferred location for built form (indicative only)



10.6. SITE 2: 'MT WIDDERIN CAVES'

10.6.1. LOTS 4 AND 5 TP810977, PARISH OF BORRIYALLOAK



View of the site from Lismore-Skipton Road

10.6.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site is located 5.7 kilometres south of Skipton on the Lismore-Skipton Road, and approximately 59 kilometres from Ballarat. The site has been shortlisted based on it being the location of the Mount Widderin Caves which are limestone caves containing interesting formations and pools. It is the only known limestone cave formation close to Melbourne. Although located on private property, the caves are publicly accessible by appointment with the owner.

POTENTIAL USES

Given its proximity to the Skipton township and unique natural attractions, the site has been identified as having opportunities to provide formal interpretation (educational, recreational and cultural guided tours), referencing the geological significance of the Caves and the history of the site. The analysis by Urban Enterprise indicates that there may also be an opportunity for group accommodation with guided tours.

10.6.3. SITE DESCRIPTION

The Mount Widderin Caves are located approximately 5.7 kilometres south of the Skipton township. The lots on which they are located has a total area of 246.2 hectares and is on sloping topography which rises gently to the east, forming part of the Mount Widderin Volcano. The Caves are located along the slope of the Volcano. The site is part of the wider Mount landscape which extends into surrounding sites to the north, east and south. A group of agricultural buildings and a dwelling are located on the site. These are set back approximately 400 metres from the western boundary and surrounded by established vegetation which screens the built form from the Lismore-Skipton Road.

10.6.4. ASSESSMENT FRAMEWORK

SITE AREA: 246.2 HA

PLANNING SCHEME

Zone	The site is located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	The site is affected by the Significant Landscape Overlay (SLO1) which applies to a broader area surrounding the site, identified as Mount Widderin. An English Oak tree on the front lawn of the site is affected by the Heritage Overlay (HO106).
MSS	The site is not specifically mentioned in the MSS or local planning policy. References to Skipton identified for Site 1 may be relevant.
LPP	The site and the township are not mentioned in any local planning policies

ENVIRONMENTAL OR ECOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- The site does not appear to be affected by any ecological constraints.

KNOWN CULTURAL HERITAGE VALUE

- The site is not included in any identified Areas of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV) however the site may be of potential Aboriginal cultural heritage value based on Aboriginal associations with Victorian caves in general. A paper titled 'The abode of malevolent spirits and creatures - Caves in Victorian Aboriginal social organisation' by Ian D Clark, 2007, contains references to the Widderin Caves and their associations with Aboriginal cultural heritage.
- The English Oak tree on the front lawn of the property is of heritage significance, as identified in the planning scheme.

LANDSCAPE OR SCENIC VALUES

- The site has landscape and scenic values as identified by SLO1. The site and/or the caves are not specifically mentioned in the (existing or proposed revised) SLO schedule as the overlay applies to the wider Mount Widderin landscape. The Mount is specifically mentioned in the schedule as a key volcanic feature.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has access to a main road - the Lismore-Skipton Road (Road Zone 2).
- The township of Skipton is within 6 kilometres of the site.

10.6.5. PLANNING CONSIDERATIONS

The site is located in an area close to, but not adjoining, urban services or other attractions. Its use for a recreational/tourism related activity would be based on the demand for such a use and its benefits to the local economy. If tours were formalised, there may be a need consider the establishment of an interpretation centre, or a sheltered place of assembly. In order to retain the landscape characteristics any new development should be sited discretely and located with other buildings already on site.

The site is not identified by AAV as being in an area of cultural heritage significance however the Caves may be of cultural heritage value based on their associations with Aboriginal cultural heritage. If

the site is identified on the Victorian Aboriginal Heritage Register, any new buildings and works may require a cultural heritage permit. In addition, environmental impacts of tourism on the caves have not been assessed and may become an issue in any planning or other approval process.

10.6.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

It is understood that the current landowner allows public access to the Caves by personal appointment. This activity could continue under the current Farming Zone. Under the Farming Zone, an interpretation centre requires a permit. A place of assembly also requires a permit, but can only be used for up to 10 days of the year. If there is interest in providing either a place of assembly or accommodation in the future, the site or a subdivided portion would need to be rezoned to the Rural Activity Zone.

SITING AND DESIGN

If further development is to occur on the site, the following guidelines should be applied:

- The existing shearing sheds should be considered for conversion to accommodation.
- New buildings should be sited away from, and should minimise views from, the homestead and caves.
- Buildings and structures should be small, low-scale and limited to the uses outlined above.

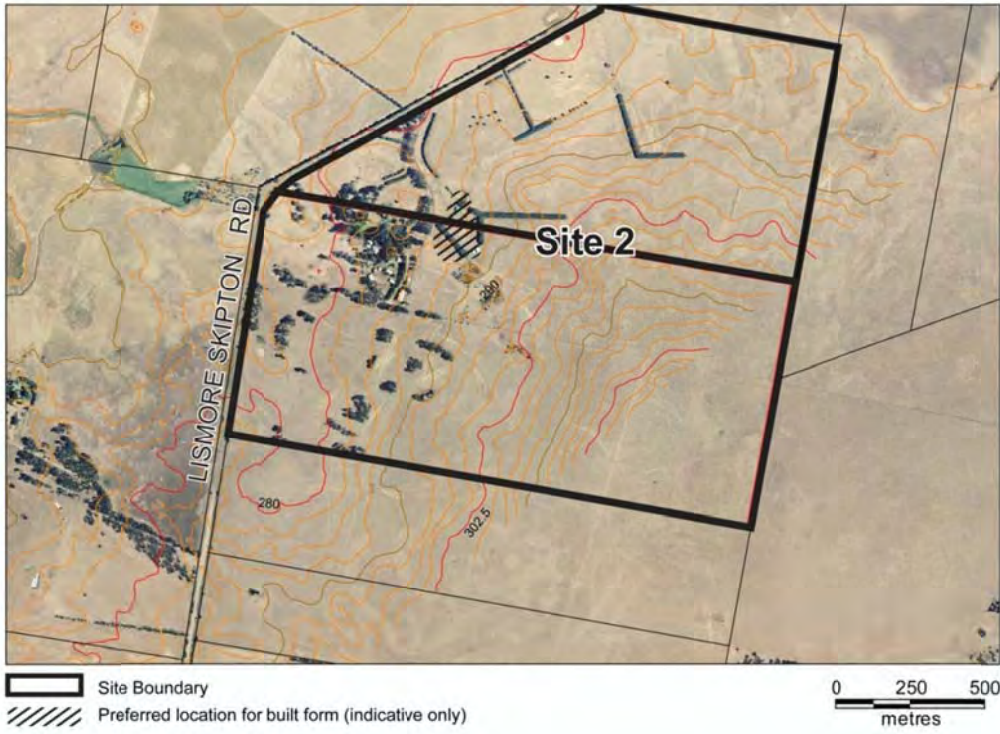
In addition, any new development should meet or consider the requirements and guidelines of:

- The Farming Zone or the Rural Activity Zone should this be applied.
- The Significant Landscape Overlay (SLO1).
- The Heritage Overlay (HO106) with respect to the existing Oak Tree.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage requirements.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- If there is interest from the owner in providing either interpretation or group accommodation, the site or a subdivided portion is rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above.
- Development only occurs for the purposes of supporting tourism in association with the caves.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.7. SITE 3: 'MT ELEPHANT, DERRINALLUM'

10.7.1. LOT 1 TP886368, PARISH OF GEELENGLA



View of Mount Elephant from Heards Road

10.7.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site is located 2 kilometres from Derrinallum and approximately 110 kilometres west of Geelong on the Hamilton Highway. The Mount is a highly identifiable landscape feature with opportunities for 360 degree views from the summit.

POTENTIAL USES

The site is a significant landscape and geological feature that provides an interesting visitor experience. Mount Elephant is open to the public on the first Sunday of every month from 1pm to 4pm. There may be additional opportunities to increase visitation, with a focus on education and interpretation. It is understood that plans exist for an interpretation centre at the base of the Mount adjacent to the quarry scar on the western side. There may also be opportunities for ancillary uses such as a food and drink premises (other than hotel or tavern).

10.7.3. SITE DESCRIPTION

The site is owned by the Trust for Nature and is managed by Mount Elephant Community Management Inc. The key feature of the site is Mount Elephant which is a steep sided volcanic scoria cone which rises steeply and suddenly from the surrounding flat landscape. It is so called because of the likeness of the formation to its namesake. The Mount was largely cleared with the introduction of pastoral land uses and has been revegetated in parts, but remains predominantly cleared, although trees and shrubs exist at the base of the cone. There are substantial visual scars to the cone due to quarrying - one on the northern side and one on the western side. The one on the western side consists of two quarries - one of which is located below ground level and owned by Corangamite Shire.

10.7.4. ASSESSMENT FRAMEWORK

SITE AREA: 138.6 HA

PLANNING SCHEME

Zone	The site is located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	The site is affected by the Significant Landscape Overlay (SLO1) which applies to a slightly larger area than the identified site, as well as other volcanic landscapes in the Shire.
MSS	The site is mentioned in the MSS at Clause 21.01 Municipal Profile and is identified as a “significant cultural heritage item”.
LPP	The site and the township are not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- The site is of documented geological significance, which would provide a constraint to any buildings or works on the cone itself (<http://www.mountelephant.com.au/>).

KNOWN CULTURAL HERITAGE VALUE

- The site is of identified cultural heritage value as documented in the MSS, but is not included in the Heritage Overlay.
- The site is within an Area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).
- The site is listed on the Register of the National Estate, classed as a natural item. The Statement of Significance reads “Mount Elephant is one of the highest and one of the major scoria cones in the largest homogeneous volcanic plain on Earth. It has scientific and recreational significance”.

LANDSCAPE OR SCENIC VALUES

- The site has landscape and scenic values as identified by the SLO1. Mount Elephant is specifically mentioned in the description of the proposed schedule as a key volcanic feature.

EXISTING OR AVAILABLE INFRASTRUCTURE

- Access is available the Hamilton Highway (Road Zone 1).
- The site is within 2 kilometres of the Derrinallum township.

10.7.5. PLANNING CONSIDERATIONS

The site already forms an important and well-known tourist attraction within the Shire. The landscape form, as described in the Site Description is one of the principal reasons for the attraction to the site and this should continue to be protected under the Significant Landscape Overlay. The boundary of the overlay should be extended to meet at least the surrounding roads in order to protect views to the Mount.

10.7.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

Public open days already occur on the site under the existing Farming Zone. These could continue to operate without any changes to the planning framework. In addition, an Interpretation centre could be constructed, subject to Council approval for the use and development.

In consultation with the Trust for Nature and the Mount Elephant Community Management Inc, Council could consider rezoning the site to an alternative zone that more accurately reflects the conservation objectives for the site. Given that the site is not used for farming or other agricultural activities, the Special Use Zone would provide the opportunity to more appropriately reflect the objectives of the site.

SITING AND DESIGN

The current boundary of SLO1 takes in the Mount itself but does not affect any of the surrounding land, which has the potential to impact on views and the landscape character of Mount Elephant. It is recommended that the SLO1 boundary is extended to meet at least the surrounding roads in order to protect views to the Mount.

If further development is to occur on the site, the following guidelines should be applied:

- Development should avoid location anywhere on the cone itself.
- The visibility of buildings and structures should be minimised from the Hamilton Highway, O'Donnell Road, Heards Road and Mt Elephant Road.
- The siting of buildings below ground level, within the quarried area, should be considered as an option to reduce impacts on views to the cone.
- Buildings and structures should be low-scale and limited to use for education and interpretation and potentially ancillary uses such as a cafe or restaurant.

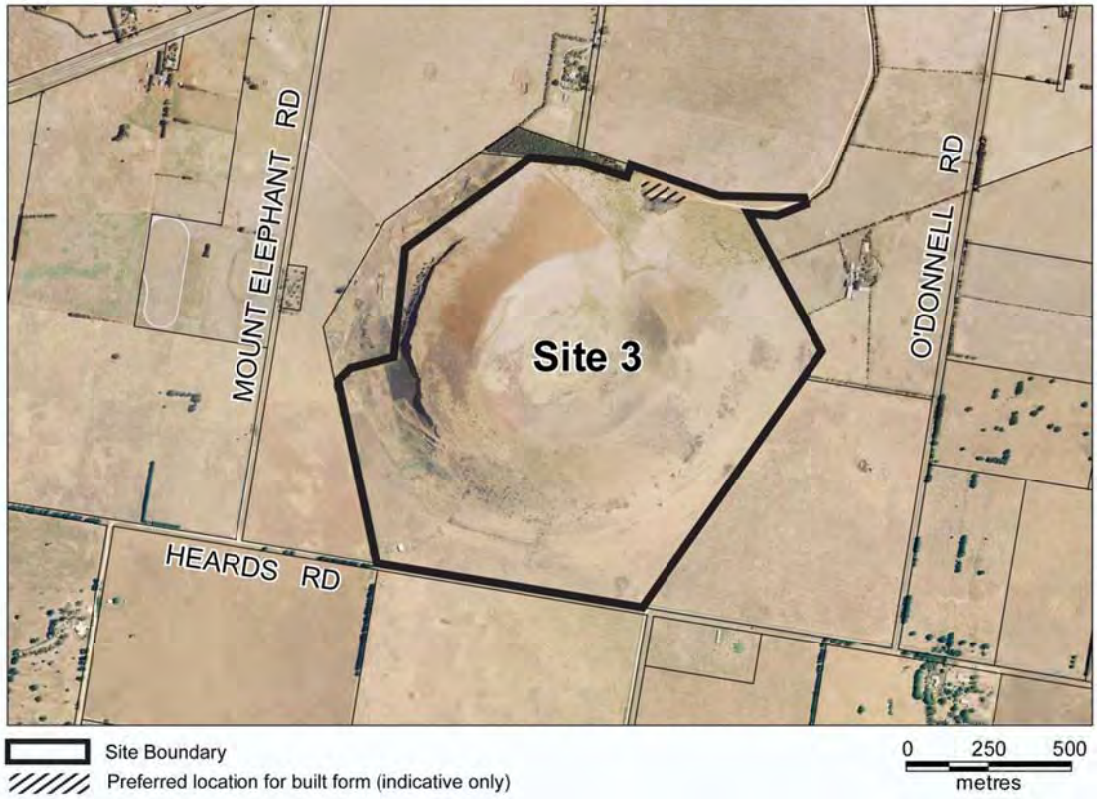
In addition, any new development should meet or consider the requirements and guidelines of:

- The Farming Zone or the Special Use Zone should this be applied.
- The Significant Landscape Overlay (SLO1).
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage requirements.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- In consultation with the Trust for Nature and the Mount Elephant Community Management Inc, the site is rezoned to the Special Use Zone.
- The siting and design of any buildings complies with the guidelines above.
- Any interpretation centre is located within the existing quarry scar, be low scale to fit into the natural landform and be constructed of materials and colours that blend with the landscape.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.8. PRECINCT 4: LAKE PURRUMBETE

10.8.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

Lake Purrumbete is located approximately 9 kilometres from Camperdown. It is a large water body of 530 hectares in size, surrounded by agricultural land. The lake is well-known for its fishing and recreational boating. The Lake Purrumbete Caravan Park is located on the south-western bank of the lake. The lake is accessible via Talindert Road, County Boundary East Road and Purrumbete Estate Road from the Princes Highway. Both of the shortlisted sites described below are located on the lake edge and have access to scenic views across the water body.

POTENTIAL USES

There are existing accommodation businesses including self-contained cabins and a caravan park at Lake Purrumbete.

Site 4A has been identified for potential self-contained accommodation in the form of cabins.

Both sites have been identified for potential management and facilitation of guided fishing trips, boat charters and hire as well as improved infrastructure such as jetties, car parking and boat ramp/s. An event or function facility has also been identified as a potential future use.

10.8.2. PRECINCT DESCRIPTION

The two sites are located with direct access to the Lake frontage.

SITE 4A: '658 PURRUMBETE ESTATE ROAD, LAKE PURRUMBETE', LOT 2 TP2 34554, PARISH OF PURRUMBETE SOUTH



View of the site from Purrumbete Estate Road

The first site is 16.5 hectares and contains a group of buildings set back 7 metres from the lake edge. The site is currently used for small-scale accommodation and is known as Lake Purrumbete Cottages. Two of the cottages are visible from the Purrumbete Estate Road. The topography of the site slopes up towards the lake away from the road, and declines down towards the lake.

SITE 4B: LOT 1 TP220902, PARISH OF PURRUMBETE SOUTH



View of the site from the lake ridgeline, off Estate Road

The second site, a Council-owned site and former scoria quarry, is accessible via Purrumbete Pit Road, off the Estate Road. The site is scarred from its former use but is vacant and contains no buildings or structures. The topography of the site has been heavily influenced by its former use, and contains a hollow which results in a steep decline towards the centre of the site. Scenic views are available across the lake towards Mounts Leura and Sugarloaf. A vehicle track accessible by 4-wheel drive circulates through the site towards the bottom of the hollow. In its current condition the steep topography of the site could present issues for development.

10.8.3. ASSESSMENT FRAMEWORK

SITE AREA

4A: 16.5 HA

4B: 1.4 HA

PLANNING SCHEME

Zone	Both sites are located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	Site 4A is not affected by any overlays. SLO1 applies to the lake and sites adjoining the eastern side of the lake, including Site 4B. ESO1 applies to the lake itself and sites adjoining the eastern side of the lake, including Site 4B. HO102 adjoins the northern side of the lake (Purrumbete Homestead), although does not impact on either site.
MSS	The sites and the lake are not referenced in the MSS.
LPP	The sites and the lake are not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- ESO1, Watercourses, water body and wetland protection overlay, identifies environmental objectives, permit requirements and decision guidelines for applications. These are all associated with the ecological significance of the lake.

KNOWN CULTURAL HERITAGE VALUE

- Both sites are partially within an area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV), which covers the Lake and a buffer area surrounding it.

LANDSCAPE OR SCENIC VALUES

- The lake is listed as a key volcanic feature in (the proposed revised version of) SLO1.
- The lake is a large scenic water body surrounded by flat pastoral land. Sites adjoining the lake, including Site 4B, also have significant views across the lake to Mounts Leura and Sugarloaf.

EXISTING OR AVAILABLE INFRASTRUCTURE

- Both sites have access to the Princes Highway (Road Zone 1) via Purrumbete Estate Road, which is sealed.

- The lake is within 9 kilometres of Camperdown, the largest township in the Shire.

10.8.4. PLANNING CONSIDERATIONS

Although currently used for accommodation, the zoning of Site 4A for Farming means that any expansion or redevelopment of the site for accommodation is restricted by the requirements of the zone.

Site 4B is also zoned for Farming, restricting its development for tourism purposes. In addition, Site 4B is affected by SLO1. In order to meet the objectives of the (proposed revised) SLO1, any new development on Site 4B would need to be carefully sited to avoid, or at least minimise views to built form from the lake itself. The steep topography of the site would make it difficult to locate new buildings or structures on the site in its current state. If the former quarry were to be levelled or filled, the only available location for buildings would be on top of the ridge line. This may be an unacceptable outcome in the context of the revised SLO1.

10.8.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

Given that Site 4A is currently used for accommodation, it is recommended that the site be rezoned from Farming to the Rural Activity Zone to allow the development of additional accommodation on the site.

Given the topographical constraints of Site 4B, it is not recommended that the site is rezoned in the short-term.

SITING AND DESIGN

An integrated approach to the redevelopment of Site 4A is preferable to the construction of buildings additional to the current cottages on the site. It would be acceptable for buildings to be located inside the rim of the crater lake in order to obtain views but not on top of the ridgeline.

Site 4B provides excellent views over Lake Purrumbete however its steep topography could present an issue for future development. The site could potentially be used to provide access to a jetty, boat ramp or lookout.

If new development is to occur on Site 4A, the following guidelines should be applied:

- An integrated approach to redevelopment of the site should be considered.
- The creation of a large single building footprint should be avoided in favour of individual cabins or cottages.
- New buildings should be low-scale and constructed with materials that are designed to complement the surrounding landscape.
- Buildings should avoid location on the ridgeline and should be benched into the topography.

In addition, any new development should meet or consider the requirements and guidelines of:

- The Farming Zone, or the Rural Activity Zone should this be applied.
- The Significant Landscape Overlay (SLO1).
- Clause 22.03-4 Tourist Use and Development.

- Clause 22.04 Particular Use and Development.
- Nature Based Tourism Guidelines (draft).
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- Part of Site 4A is rezoned to the Rural Activity Zone. This should occur simultaneously with a subdivision of the existing title, with the rezoning only taking in the eastern half of the site.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below (Site 4A).



10.9. SITE 5: 'GLENORMISTON COLLEGE'

10.9.1. CROWN ALLOTMENT 5, PARISH OF GLENORMISTON



Glenormiston Estate Mansion (left) and College building (right)

10.9.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site is located approximately 5 kilometres from Terang and 190 kilometres from Geelong on the Princes Highway. The site contains a historic mansion and garden. The site is also within close proximity of Mount Noorat, a landscape of significance within the Shire.

POTENTIAL USES

The site already contains extensive facilities with flexible uses including education, entertainment and recreation. There may be potential to upgrade these facilities in order to fulfil particular opportunities such as a function centre, or hotel. It is understood that the TAFE has upgraded some of the existing dormitories to provide accommodation for conferences and events, however the format of this upgrade may be somewhat restrictive. Larger and more frequent conferences and events could be catered for. However, as identified by Urban Enterprise, it may be necessary to convert existing accommodation in order to appeal to a wider market. Double beds and private bathrooms would need to be provided to appeal to a wider market.

10.9.3. SITE DESCRIPTION

The site is a large property currently occupied by the South West TAFE Glenormiston Campus. The site comprises an extensive group of buildings and facilities associated with the TAFE, including a hall, dormitories and sports facilities including a gym, tennis courts, sports oval and pavilion. Of particular note is the original mansion of the Glenormiston Estate, which has a grand appearance and is of heritage significance. The buildings are set within landscaped garden surrounds of which are also of heritage significance. Buildings and spaces are available for hire by the public.

10.9.4. ASSESSMENT FRAMEWORK

SITE AREA: 200 HA

PLANNING SCHEME

Zone	The site is located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	The site is affected by the Heritage Overlay (HO59: Glenormiston Agricultural College, Blacks Road, Glenormiston).
MSS	The site is not specifically mentioned in the MSS or local planning policy.
LPP	The site and the township are not mentioned in any local planning policies

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- The site does not appear to be affected by any ecological constraints.

KNOWN CULTURAL HERITAGE VALUE

- The site is of identified post-settlement heritage value as documented by the Heritage Overlay (HO59). The citing states that “the heritage place includes the former homestead and *edrus atlantica f.glauca* (Blue Atlas Cedar) rear of sports building, and *Cupressus sempervirens* (Italian Cypress), 2, either corner of main house.”
- The Glenormiston Homestead is also listed on the Victorian Heritage Register (VHR - H1611).
- A very small part of the campus is in an Area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- The site does not have any identified landscape or scenic values, but is of scenic value for the original mansion and formally landscaped gardens.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has access to roads which connect with the nearby township of Terang.
- According to the Infrastructure section of Clause 21.01 Municipal Profile, Glenormiston does not have reticulated sewerage but at the time of gazettal, opportunities to rectify this were being pursued.

10.9.5. PLANNING CONSIDERATIONS

Any buildings and works would need to comply with the requirements of the Heritage Overlay that applies to the site. It is not known what the site within the campus of Area of Cultural Heritage Sensitivity is, but should any buildings or works be proposed in this specific location, there may be a need to obtain a Cultural Heritage permit.

10.9.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

Under the Farming Zone, the use of the land as an Educational Centre (tertiary institution) or a Residential College is prohibited, however existing use rights apply given that the site has a long

history of education uses. If education is to remain the primary function of the site, other activities could occur as ancillary uses.

It is noted that a Residential College is a prohibited use in the Rural Activity Zone, although an Education Centre is not. However if the future intent for the site is to become a more flexible tourism based facility with a focus on conferences and events, the site could be rezoned to the Special Use Zone, recognising its multiple functions. If in the future a new owner, not associated with education, were to propose a use that were solely for tourist related functions (e.g. Hotel/Motel, Group Accommodation, Backpackers' lodge) then the Rural Activity Zone may be more appropriate in the long-term.

SITING AND DESIGN CONSIDERATIONS

If further development is to occur on the site, the following guidelines should be applied:

- New development should respect the heritage values of the buildings and gardens on the site.
- Wherever possible, existing buildings and facilities should be used and/or refurbished to create new opportunities for accommodation and conferences.

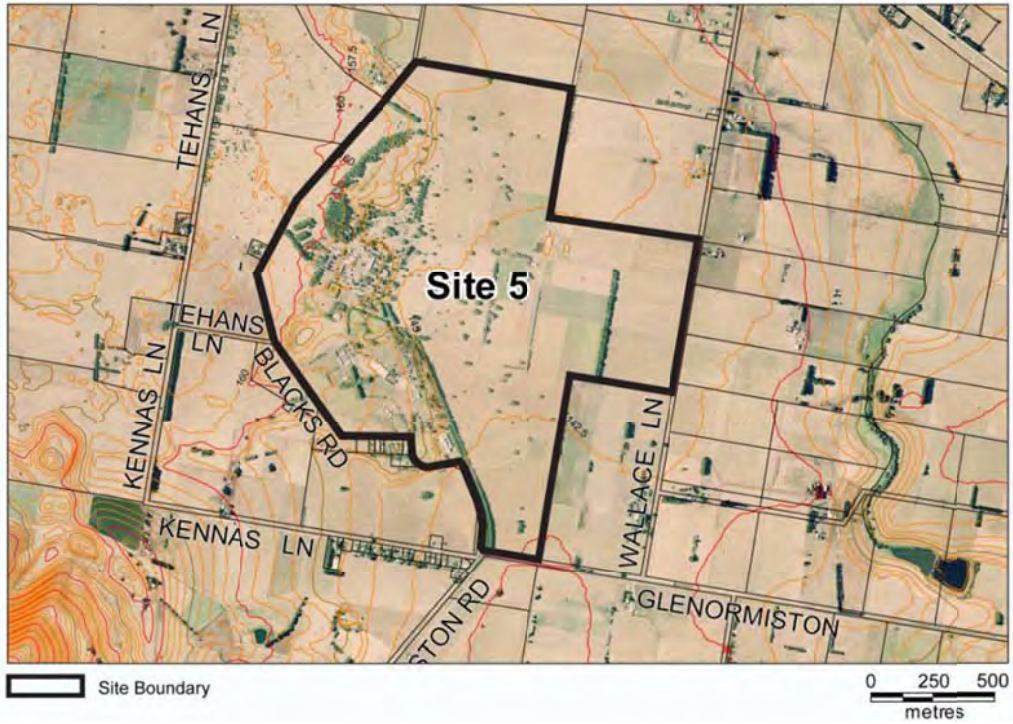
In addition, any new development should meet or consider the requirements and guidelines of:

- The Farming Zone or the Special Use Zone should this be applied.
- The Heritage Overlay.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The site is rezoned to the Special Use Zone to reflect its multiple functions and allow for future tourism focused activity.
- The siting and design of any buildings complies with the guidelines above.



10.10. PRECINCT 6: TIMBOON AND SURROUNDS

10.10.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The precinct contains three sites within and adjacent to the Timboon township. The township has an existing tourism base with several attractions including Timboon Camperdown Rail Trail, the Timboon Golf Course and the Timboon Railway Shed Distillery. The township is also developing as a hub for food and produce and has a number of existing local produce operators. It is located only 17km from the Port Campbell Township and National Park and is located on a touring route.

POTENTIAL USES

The three sites provide differing opportunities for tourism related activities. Site 6A, Berry World, has been identified as a potential location for a produce/ convenience store or café/ restaurant in association with the existing use and Sites 6B and 6C have been identified as presenting opportunities for group accommodation, a caravan park or residential hotel.

10.10.2. PRECINCT DESCRIPTION

SITE 6A: 'BERRY WORLD', LOT 1 TP166179, PARISH OF TIMBOON



View of the Berry World site from Egan Street

Berry World is located on approximately 16 hectares of land in Egan Street just north-west of the built up area of the township. Egan Street forms the western boundary of the site and Powers Creek and the Timboon Camperdown Rail Trail form the eastern boundary. The Timboon Golf Course is located on the western side of Egan Street. The site slopes down towards the creek away from the western boundary. The site is used for agriculture (a Berry farm) and contains a dam, crops and a group of buildings including a dwelling at the south west corner. Established vegetation is located along the western, northern and eastern boundaries. Along the eastern boundary on-site vegetation is associated with the extensive vegetation corridor along the Creek and Rail Trail corridor.

SITE 6B: 1 'BARRETT STREET, TIMBOON', LOT 2 LP205437 AND LOT 1 LP88072, PARISH OF TIMBOON

The second site is divided into two parcels of 2.7 hectares and 1.1 hectares and is located on the southern side of Barrett Street within the centre of the township. Established vegetation screens most of the site, including two buildings, from the road. The Creek and Rail Trail are located on the southern boundary of the site. The site slopes down away from Barrett Street towards the creek.

SITE 6C: LOT 10 LP94831, PARISH OF TIMBOON

The third site is a small property of 0.6 hectares Rands Road. The site contains a small number of trees but is largely vacant. The site is on flat to gently sloping topography.

10.10.3. ASSESSMENT FRAMEWORK

PLANNING SCHEME

Zone	All sites are located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	Site 1 is affected by the Wildfire Management Overlay.
MSS	<p>Timboon is identified in the MSS Clause 21.01 Municipal Profile as a township that has experienced one of the greatest increases in population. Clause 21.01 also states that there are significant cultural heritage items in Timboon including its grave site, hotel and Timboon railway trestle bridge.</p> <p>Clause 21.03-3 Strategic Framework Plan states that there is a need to protect high quality agricultural land in Timboon from development.</p> <p>Clause 21.04-1 Settlement includes a detailed description of the township. It states that "Tourism offers a growing market for Timboon and development associated with the tourism industry is encouraged. Assets include boutique produce industries, proximity to the coast and Great Ocean Road, walking trails, the natural environment and heritage. Opportunities exist within the township to capitalize on these assets particularly on the railway land directly adjacent to the main commercial precinct." It has as two of its objectives: "To provide for a growing tourism industry." And "To increase the type of accommodation available to residents and visitors."</p> <p>The Timboon Township Structure Plan in the MSS identifies Site 6B for tourist related facilities and accommodation.</p>
LPP	The sites and the township are not mentioned in any local planning policies

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Sites 6A and 6B may contain native vegetation however there are no overlays that indicate this is of particular significance.

KNOWN CULTURAL HERITAGE VALUE

- The township contains one site adjacent to Site 6B that is affected by the Heritage Overlay. The citing states: "Cordyline australis, Cabbage Tree, Timboon railway reserve, next to former residence".
- None of the sites are within an area of Aboriginal Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- None of the sites have identified landscape or scenic values.

EXISTING OR AVAILABLE INFRASTRUCTURE

- Sites 6A and 6C are located on local roads, which connect to main roads leading out of the township - Timboon-Nullawarre Road, Timboon-Scotts Creek Road, Timboon-Colac Road and Timboon-Port Campbell Road. Site 6C is located on the Timboon-Colac Road (Road Zone 2). Sites 6A and 6B are accessible via sealed roads, while Site 6C is only accessible via an unsealed road.
- All sites are located within or adjacent to the built-up area of Timboon.

- Timboon is serviced with piped water from a deep groundwater aquifer and a sewerage treatment plant.

10.10.4. PLANNING CONSIDERATIONS

All sites are located within proximity of the township which contains existing tourism attractions.

Additional uses of Site 6A for a cafe or store selling produce from the farm itself and other sources would require a rezoning from Farming to Rural Activity.

Site 6B is conveniently located for accommodation or other tourism uses, with good access to the township. In order for these types of uses to occur, the site would require rezoning from Farming to Rural Activity.

It is difficult to justify the development of Site 6C for accommodation in the short term, given its location at the edge of the township outside the existing built up area. Development on this site could appear as an outward expansion of the township boundary and is a small site unlikely to add significantly to the accommodation offer. In the short-term, Site 6B reflects a better option for accommodation or other tourism related uses, given its size and proximity to the town centre as well as the Creek and Rail Trail.

10.10.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

It is recommended that Site 6A is rezoned to the Rural Activity Zone in order to encourage additional uses such as a cafe or produce store.

The immediate rezoning of Site 6B could occur given the strategic justification provided in the MSS. The site could be rezoned to Rural Activity and encouraged to be developed for tourist accommodation by inclusion of a statement in the MSS.

Site 6C could be considered for future accommodation in the long-term, but it is not recommended that the site be immediately rezoned to facilitate this.

SITING AND DESIGN CONSIDERATIONS

If further development is to occur on any of the sites, the following guidelines should be applied:

- Any new buildings on Site 6A should be located towards the southern end of the site, closest to the built up area of the township.
- Any new buildings on Site 6A should be of a high-quality design taking advantage of views over the site and the Creek/Rail Trail corridor.
- Any new development on Site 6B should be of a high-quality design, reflecting the high-profile location of the site within the township.
- All new development should be designed to reflect the natural surroundings, including through the use of appropriate materials and retention of existing vegetation wherever possible.

In addition, any new development should meet or consider the requirements and guidelines of:

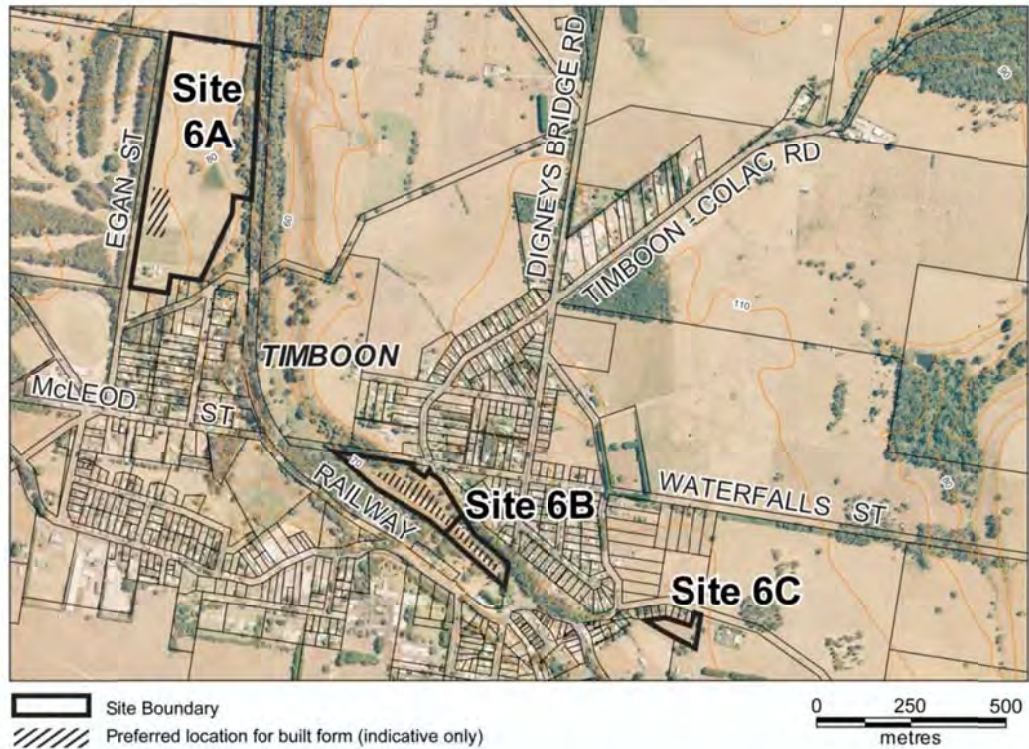
- The Farming Zone or Rural Activity Zone should this be applied.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.

- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- Site 6A is rezoned to the Rural Activity Zone.
- Site 6B is rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.11. SITE 7: 'SCOTTS CREEK GENERAL STORE',

10.11.1. LOT 1TP684191 TOWNSHIP OF SCOTTS CREEK

10.11.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The former Scotts Creek General Store site is located within a small and dispersed settlement with very few dwellings. It is located on the Cobden-Port Campbell Road, a route frequented by those travelling in a north-south direction, either from Cobden, Camperdown or further north. This places the site in a good location to attract passers-by. The site is also surrounded by scenic rural and forested land which provides an ideal backdrop.

POTENTIAL USES

The site has been identified as having the potential to be further developed for a café/restaurant, produce sales or tourist retail/convenience shop as well as group accommodation.

10.11.3. SITE DESCRIPTION

The site, which is relatively small in size, until recently comprised a dwelling and general store, both located at the south-eastern extent of the site. Both buildings were destroyed by fire in August 2010.

The site is conveniently accessed off the Cobden-Port Campbell Road via a small service road / parking area. The western half of the site is dominated by dense forest, which continues onto adjoining sites.

10.11.4. ASSESSMENT FRAMEWORK

Site area: 2.9 Ha

Planning scheme

Zone	The site is located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	ESO1 applies to approximately one third of the north-western part of the site. VPO1 applies to the western, vegetated half of the site. The WMO applies to most of the site.
MSS	The site is not referenced in the MSS.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- The site has identified environmental value in terms of the unidentified watercourse which runs across the property in a north-south direction, as well as the remnant native vegetation located on the site.
- ESO1 outlines the significance and constraints associated with watercourses throughout the Shire, while VPO1 applies to significant remnant vegetation.

KNOWN CULTURAL HERITAGE VALUE

- The site may be within an area of Aboriginal Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- The site does not have identified landscape values, however it is set within scenic rural land, further enhanced by the remnant vegetation located on the subject and adjoining sites.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site is located at the intersection of the Cobden-Port Campbell Road and the Timboon-Colac Road, both in the Road Zone 2.

10.11.5. PLANNING CONSIDERATIONS

The site is partially constrained by remnant vegetation, recognised by VPO1, as well as land which is affected by ESO1. If further development is to occur on the site, these considerations would need to be taken into account. In addition, it is not known whether the site is within an area of Aboriginal Cultural Heritage Sensitivity, therefore this would need to be checked in greater detail as to whether a Cultural Heritage Permit is required.

10.11.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

The current zoning of the site allows for the use of land for primary produce sales and a restaurant, subject to Council approval, however the zone is restrictive in terms of allowing the sale of non-agricultural related produce. Retail premises offering a more general product, such as a shop or convenience store, are prohibited in the zone. The Rural Activity Zone would offer more flexibility in terms of what could be provided on the site, although a permit would still be required for the use of land for the opportunities identified.

SITING AND DESIGN

If further development is to occur on the site, the following guidelines should be applied:

- Any new commercial activities on the site should either occur in the location of the former General Store, or nearby in order to attract the attention of passers-by.
- Tourist accommodation should be located to the north of the existing vegetation buffer along the Cobden-Port Campbell Road.
- Any new buildings or structures should be of a high architectural standard, reflecting the opportunity to attract passers-by.
- Any new development should be designed to reflect the natural surroundings, including through the use of appropriate materials and retention of existing vegetation wherever possible.
- Any new dwelling or tourist accommodation should be screened by new or existing vegetation.

In addition, any new development should meet or consider the requirements and guidelines of:

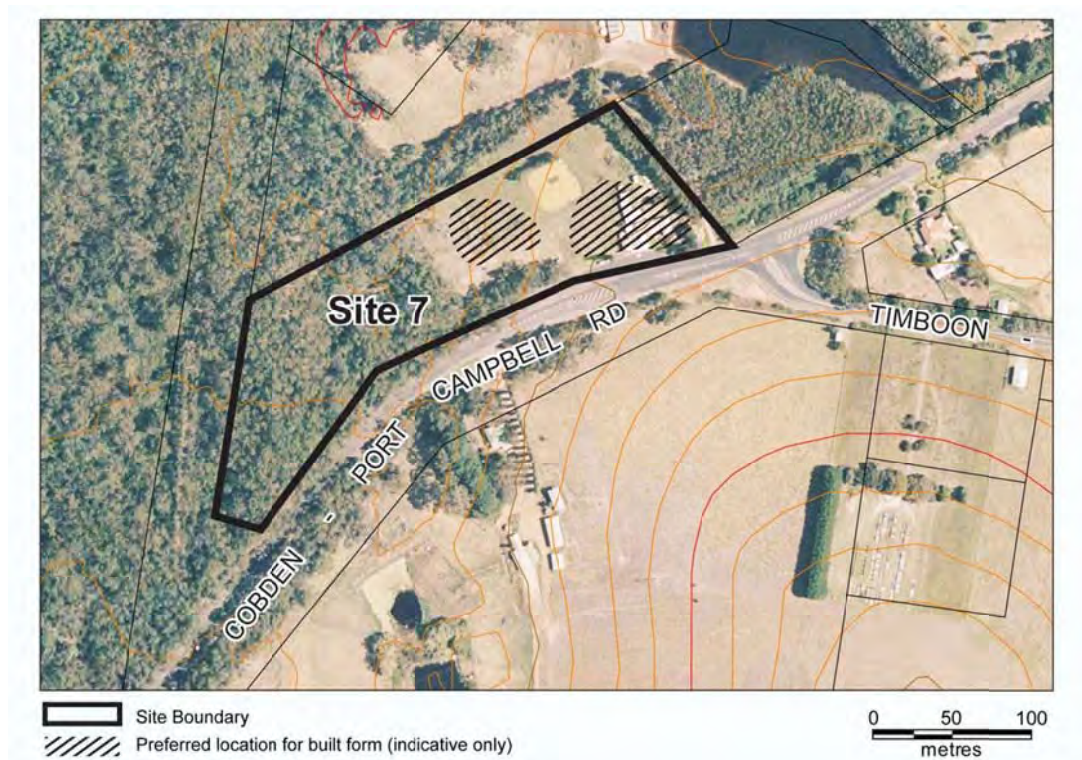
- The Farming Zone or Rural Activity Zone should this be applied.

- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The site is rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.12. SITE 8: 'CAMP COORIEMUNGLE'

10.12.1. CROWN ALLOTMENT 10D SECTION C, PARISH OF WAARRE

10.12.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site is remotely located 12 kilometres north of the coastline and 13 kilometres south-east of Timboon, the closest township. The site is surrounded by scenic rural landscapes but is generally hidden in views from the main road, Cooriemungle Road, by a vegetation buffer. Cooriemungle Creek traverses outside the southern boundary of the site and leads to a water body which is located on the south-eastern corner of the site.

POTENTIAL USES

The site is currently being used as a school camp and it is envisaged that this use will continue into the future as well as general camping and group accommodation.

10.12.3. SITE DESCRIPTION

The site comprises extensive facilities associated with the school camp. The former use of the site for a prison farm is reflected in the layout and design of buildings, providing opportunities for surveillance. A number of cabins and common areas as well as outdoor education facilities are located on the site.

10.12.4. ASSESSMENT FRAMEWORK

Site area: 13.92 Ha

Planning scheme

Zone	The site is located in the Farming Zone. Schedule 1 to the Farming Zone applies.
Overlays	The site is partially affected by the Wildfire Management Overlay (WMO) and the Environmental Significance Overlay (ESO1).
MSS	The sites and the lake are not referenced in the MSS.
LPP	The sites and the lake are not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Part of the site is subject to ESO1 which recognises the environmental significance of Watercourses, water body and wetlands. The overlay has been applied to the Cooriemungle Creek as well as a buffer area surrounding it.

KNOWN CULTURAL HERITAGE VALUE

- The site is within an area of Aboriginal Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- The site does not have identified landscape values, but is set within a scenic rural landscape.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has access to Coorimungle Road, which is sealed and Bornong Road which is unsealed
- The site is remotely located. The nearest township, Timboon is located approximately 13 kilometres to the north-west.

10.12.5. RECOMMENDATIONS

PLANNING CONSIDERATIONS

It is anticipated that the site will continue to be used for a camp facility with associated activities. If new development is proposed on the site, it should be checked whether a Cultural Heritage Permit is required given the identified cultural heritage significance of the site. In addition, any development proposed on the southern portion of the site affected by ESO1 should have regard to the environmental significance and constraints imposed by the creek and surrounds.

10.12.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

Given that the site is currently used for a school camp facility, it would be appropriate for the site to be rezoned to reflect this existing use, as well as to encourage the upgrading of any facilities in association with this use.

SITING AND DESIGN

If further development is to occur on the site, the following guidelines should be applied:

- Any new buildings or structures should continue to be screened by vegetation in views from surrounding roads.
- Any new development should be designed to reflect the natural surroundings, including through the use of appropriate materials and retention of existing vegetation wherever possible.

In addition, any new development should meet or consider the requirements and guidelines of:

- The Farming Zone or Rural Activity Zone should this be applied.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The site is rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above.



10.13. SITE 9: 'PETERBOROUGH AIRFIELD'

10.13.1. LOT 2 TP834074, PARISH OF TIMBOON

ADDRESS / IDENTIFIER: LOT/PLAN OR CROWN DESCRIPTION: 1 558 TIMBOON-PETERBOROUGH ROAD, PETERBOROUGH



View of the site from Cummings Road

10.13.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site is located 1.5 kilometres east of Peterborough, opposite the Port Campbell National Park and the coastal edge. For the most part, the southern boundary of the site abuts the Great Ocean Road and is surrounded on other sides by separate parcels and local roads.

POTENTIAL USES

The site has been identified for potential expansion of existing uses involving the heliport and airport. Opportunities include additional light aeroplane flights to King Island and joy flights over the Twelve Apostles. Being the second-closest mainland access to King Island after Apollo Bay Airfield, there may also be other tourist retail opportunities which link to King Island product. Some group accommodation would also be suited to the location, given its proximity to the Great Ocean Road and Peterborough.

10.13.3. SITE DESCRIPTION

The site, which is just over 60 hectares in size, is largely cleared and located on flat to sloping topography which rises gently to the east. The land is currently used as a heliport and air strip and comprises an 850 metre runway. Helicopter tours are run from this location and small aeroplane flights are available to King Island. Views to the coastline and ocean are limited due to the topography of the National Park which rises slightly from the southern boundary of the site.

The adjoining site to the north-west is used in conjunction with the air strip and comprises a hangar and other buildings. These are accessed from Cummings Road and are surrounded by vegetation to the south. The vegetation screens the buildings in views from the Great Ocean Road

10.13.4. ASSESSMENT FRAMEWORK

SITE AREA: 60 HA

PLANNING SCHEME

Zone The site is located in the Rural Conservation Zone. Schedule 1 to the Rural

Conservation Zone applies.

Overlays	SLO3, Great Ocean Road Landscape Area applies to the site and takes in a wider area to the east.
MSS	While the site is not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being on an exposed part of the coastline, the site may be subject to environmental constraints such as erosion, wind and salt spray.

KNOWN CULTURAL HERITAGE VALUE

- A portion of the southern part of the site is in an Area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV). This is part of the buffer zone associated with the National Park and coastline.

LANDSCAPE OR SCENIC VALUES

- The site is located within the wider significant landscape currently identified by SLO3 as the Great Ocean Road Landscape Area (proposed to be revised to Great Ocean Road Landscape - Peterborough to Princetown).
- The site is visible in views from the Great Ocean Road particularly when travelling east.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has access to the Great Ocean Road (Road Zone 1), the Timboon-Peterborough Road and Cummings Road.
- The site is located 1.5 kilometres from Peterborough.

10.13.5. PLANNING CONSIDERATIONS

The current use of the site as a Transport Terminal is a prohibited use under the existing Rural Conservation Zone. Although a non-conforming use, the land may have existing use rights given the establishment of its uses prior to the introduction of the zone. If it does, the current use can continue to operate and expand, subject to Council approval.

In any expansion of the existing use, the impact on surrounding landowners in terms of noise pollution should be minimised. In addition, any new development visible from the Great Ocean Road should be designed and sited to minimise visibility to buildings and structures due to the significance of the coastal landscape.

Clause 18.04 of the State Planning Policy Framework (Airfields) sets out guidance for airfields and seeks to, among other things, facilitate extensions to airfields, restrict incompatible land use and development in the vicinity of airfields, and recognise and strengthen the role of airfields as focal points within the State's economic and transport infrastructure. In order to achieve this objective, Clause 18.04 states that (relevant to Site 7):

- The location of airfields, existing and potential development nearby, and the land-based transport system required to serve them should be planned as an integrated operation.

- The visual amenity and impact of any use or development of land on the approaches to an airfield should be planned to be consistent with the status of the airfield.

In addition, planning for areas around all airfields should:

- Preclude any new use or development which could prejudice the safety or efficiency of an airfield.
- Take into account the detrimental effects of aircraft operations (such as noise) in regulating and restricting the use and development of affected land.
- Preclude any new use or development which could prejudice future extensions to an existing airfield or aeronautical operations in accordance with an approved strategy or master plan for that airfield.

10.13.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

If the site has existing use rights, it may be able to continue and expand its operations without a change of zone. Given the existing use of the site, it would appear appropriate for it to be rezoned to a Special Use Zone specific to its use as a Transport Terminal (including airport and heliport) in order to allow the facilities to be expanded if necessary. Any expansion including buildings and works would need to take into account safety requirements, residential development nearby, the significance of the landscape, in particular in views from the Great Ocean Road and impacts on surrounding landowners. Any application for expansion or redevelopment should be required to be accompanied by a Concept Plan detailing how these, and other, considerations have been responded to.

SITING AND DESIGN

If further development is to occur on the site, the following guidelines should be applied:

- Any new buildings or structures be low-scale and integrated within the landscape.
- Any new development should be designed to reflect the natural surroundings, including through the use of appropriate materials in muted colours and retention of existing vegetation wherever possible.
- In order to minimise noise pollution to surrounding landowners, the helipad and helicopter storage facility could be relocated to the eastern end of the site, with access from Cummings or Jarvis Road.
- If located towards the eastern end of the site, the helicopter storage facility should be constructed to consider the appearance of and minimise the prominence of the building in views from the Great Ocean Road. This should be achieved through the use of:
 - Darker colours and finishes.
 - Vegetation screening.

In addition, any new development should meet or consider the requirements and guidelines of:

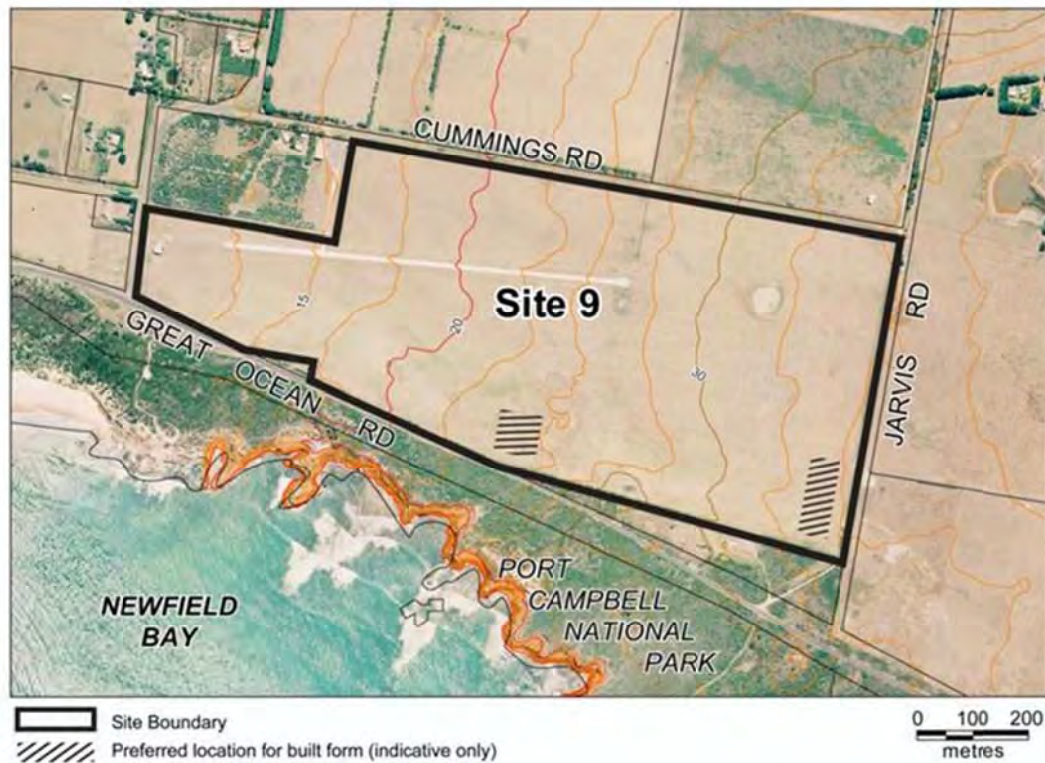
- The Special Use Zone, should this be applied.
- Existing (and proposed revised) Significant Landscape Overlay (SLO3).
- Clause 18.04 Airfields.
- Clause 22.03-4 Tourist Use and Development.

- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The site is rezoned to a Special Use Zone.
- The siting and design of any buildings complies with the guidelines above.
- Any new helicopter storage facilities are located within the 'preferred location for built form', shown on the map below, subject to the consideration of safety issues.



10.14. SITE 10: 'PORT CAMPBELL WEST'

10.14.1. 268 GREAT OCEAN ROAD, PORT CAMPBELL, LOT 1, TP174312, PARISH OF PAARATTE



Views towards the coastline from the site

10.14.2. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The Port Campbell West site is located on two separate parcels of land in common ownership opposite the Port Campbell National Park and the coastal edge. The site is located approximately 2.2 kilometres west of the Port Campbell township via the Great Ocean Road and just over 8 kilometres to the western extent of the Twelve Apostles.

The greatest strengths of the site include its access to the services of Port Campbell, unparalleled views of the coast, particularly from higher elevations and access from the Curdivale-Port Campbell and Great Ocean Roads.

POTENTIAL USES

The site offers a significant opportunity for a tourism development, such as a larger-scale integrated resort facility (incorporating camping and caravan park, group accommodation, Host farm and residential hotel) within close proximity of Port Campbell and the Twelve Apostles. The RACV Inverloch Resort has been provided as an example of the type of development that could be envisaged at Port Campbell.

10.14.3. SITE DESCRIPTION

The site is approximately 50 hectares in total, in two parcels. The larger parcel of land is used as a dairy farm while the smaller parcel comprises agricultural buildings associated with the dairy and a dwelling. The buildings are located 35 metres from the Great Ocean Road and are highly visible from the western approach along the Great Ocean Road. The remainder of the site is partially or wholly screened by the vegetation of the National Park which acts as a buffer between the site and the Great Ocean Road.

The topography of the site rises from the southern boundary to the north-west corner, ranging in elevation from 50 metres to 75 metres (AHD). The elevation of the site allows unparalleled views of the coast. There may be particular locations on the site that would allow larger scale tourist development to occur discretely without impacting greatly on views from the Great Ocean Road. Although located within close proximity of the Port Campbell township, the site does not appear to be visible from the built up area apart from in one location near the intersection of the Great Ocean Road and McCue Street.

The site directly to the north comprises a sewerage plant that services the township and although not a visible eyesore, the plant would need to be considered in the siting of any new development.

10.14.4. ASSESSMENT FRAMEWORK

Site area: 50 ha

Planning scheme

Zone	The site is located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	SLO3, Great Ocean Road Landscape Area applies to the site and takes in a wider area to the east and west.
MSS	While the site is not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being on an exposed part of the coastline, the site may be subject to environmental constraints such as erosion, wind and salt spray.
- The location of the sewage treatment plant on adjacent land will constrain the location of any future development. The system used in Port Campbell is a Treatment Lagoons System (or Aerobic pondage system). Buffer distances for sewage treatment works should be determined in consultation with the Environmental Protection Agency (EPA). Wind regimes, topography, waste-loading, treatment/disposal methods and design capacity should be taken into account (Recommended Buffer Distances For Industrial Residual Air Emissions, EPA, July 1990).
- The following table provides a guide for buffer distances from sewage treatment plants and disposal areas:

	Installation treatment capacity (equivalent population)			
	<1000	<5000	<20000	<50000
Buffer distance from Facultative Ponds	300m	700m	1400m	2200m
Buffer distance from disposal areas for secondary treated effluent by spray irrigation	200m	200m	200m	200m

Source: EPA, 1990

KNOWN CULTURAL HERITAGE VALUE

- A tract of land along the southern boundary of the site is within an Area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- The site is located within the wider significant landscape currently identified by SLO3 as the Great Ocean Road Landscape Area (proposed to be revised to Great Ocean Road Landscape - Peterborough to Princetown).
- The site is visible in views from the Great Ocean Road, to the south of the site. While views from the Port Campbell township are limited, the site can be seen from the southern end of McCue Street at the intersection of the Great Ocean Road. This is a key viewing location from the eastern approach towards the township.
- The site contributes to the value of this landscape given its elevation, level of exposure and visibility from parts of the Great Ocean Road.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has access to the Great Ocean Road (Road Zone 1) but is also accessible via a tract of land off Curdivale-Port Campbell Road. Future access via the Curdivale-Port Campbell Road may be preferable.
- The site is located within 800 metres (straight line distance) of the Port Campbell township.
- Existing services including water, sewer and electricity can all be sourced from Port Campbell.

10.14.5. PLANNING CONSIDERATIONS

The site is well located to provide the opportunity for overnight accommodation in association with the improved visitor facilities proposed at the Twelve Apostles Visitor Information Centre.

The primary planning consideration for this site is retaining the landscape qualities of the coastal environs identified through the SLO, and minimising the visibility of development from the Great Ocean Road. The topography of the site provides the opportunity for development to be discretely sited and designed to avoid prominence in the landscape. One of the advantages of the site is the access available from the Curdivale-Port Campbell Road. This provides an opportunity to reinstate a native vegetation buffer at the Great Ocean Road entrance to the property and use the northern access track as the primary entrance, improving the appearance of the site from the Great Ocean Road. The access track may need to be sealed or treated in order to allow for caravans to access the site.

The site is located adjacent to the Sewage Treatment Works for Port Campbell. The buffers required for development need to be established with the EPA prior to any detailed design work for this site.

10.14.6. IMPLEMENTATION RECOMMENDATIONS

ZONING

The site would need to be rezoned to allow an integrated resort facility as the existing Rural Conservation Zone limits accommodation uses. The Rural Activity Zone would allow the range of uses envisaged, however the intensity of the use proposed would be better suited to a Special Use Zone. The Special Use Zone would allow Council to encourage specific uses of the site including for accommodation and recreation. It is recommended that the Special Use Zone be applied, with a schedule tailored to meet the specific land use, access and siting objectives of the site.

SITING AND DESIGN CONSIDERATIONS

If development is to occur on the site, the following guidelines should be applied:

- Buildings should be sited to avoid the highest contour lines on the site.
- Buildings should be designed to follow the contours of the site.
- The built form should be broken up to avoid the appearance of a large single building footprint.
- Development should be screened in views from the township through the use of vegetation.
- If possible, the site should be accessed from the north. The appearance of the southern entrance should be improved or closed and reinstated with native vegetation.

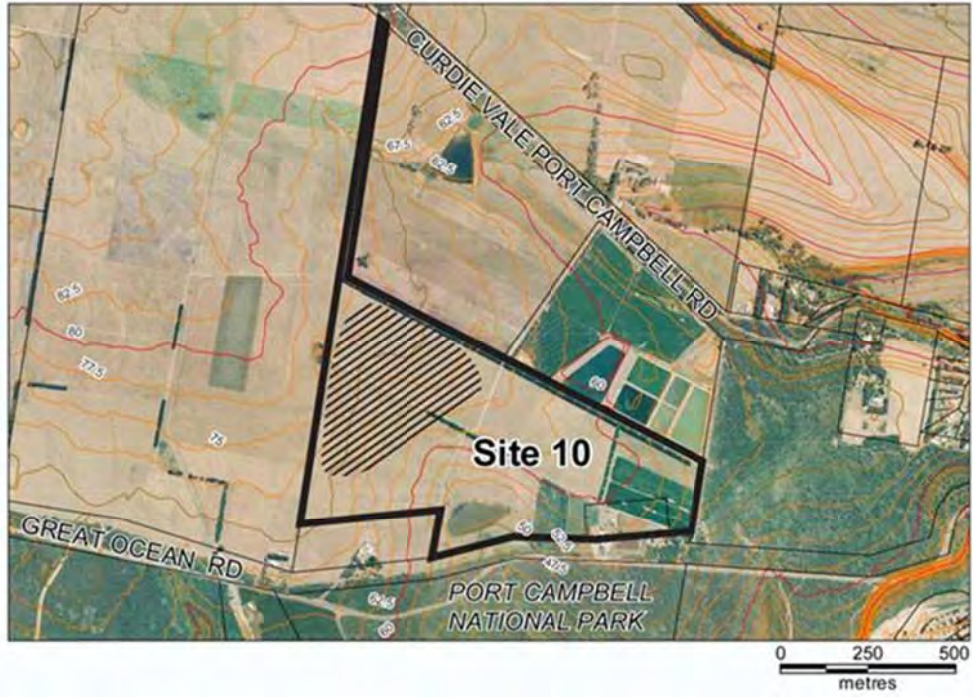
In addition, any new development should meet or consider the requirements and guidelines of:

- The Rural Conservation Zone or the Special Use Zone should this be applied.
- Existing (and proposed revised) Significant Landscape Overlay (SLO3).
- Recommended Buffer Distances for Industrial Residual Air Emissions, EPA, July 1990 (and any further recommendations of the EPA).
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The site is rezoned to the Special Use Zone.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.15. PRECINCT 11: LOCH ARD

10.15.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

There are three sites included in the Loch Ard Precinct, which all adjoin the Port Campbell National Park and are located north of Loch Ard Gorge and the Twelve Apostles. The Twelve Apostles viewing area is accessible just south of Booringa Road where the Visitor Amenity Centre is located.

It is understood that Parks Victoria is proposing to build a new interpretative centre opposite Loch Ard Gorge, north of the Great Ocean Road. The new centre will have the potential to draw a greater number of tourists to the area for longer periods of time.

POTENTIAL USES

Additional accommodation such as a residential hotel is required in the area to meet latent demand and particularly in conjunction with the proposed new interpretive centre within public land.

10.15.2. PRECINCT DESCRIPTION

SITE 11A: 'LOCH ARD BED AND BREAKFAST', LOTS 1 AND 2, LP114924, PARISH OF WAARRE

The Loch Ard Bed and Breakfast (B&B) is located on just over 90 hectares of land on two separate parcels of land on Yaruck Road. The Port Campbell National Park abuts the site along its northern and southern boundaries providing it with a sense of seclusion. The buildings associated with the B&B are sited 500m from Yaruck Road and 270 metres from the southern National Park property boundary. The B&B is signposted and accessible via a track located on the western boundary. The buildings appear to be on the most elevated part of the site and are therefore visible from this location, but are partially screened by vegetation. Views to the coast are available from the B&B.

SITE 11B: 8816 GREAT OCEAN ROAD, PRINCETOWN, CROWN ALLOTMENT 2 SECTION A, PARISH OF WAARRE



Views from the site towards the coastline

The second site is just less than 130 hectares in size and is located on the Great Ocean Road, although there is a 200 metre buffer between the southern boundary of the site and the road reserve. The new interpretative centre is proposed to be located in the National Park just west of the site. The site does not comprise any buildings, is used for agricultural purposes and contains two dams and an access track via another parcel to the east. There is no existing access from the Great Ocean Road. The 200 metre buffer comprises low coastal heath which allows views to the site from the Great Ocean Road. Parts of the site have access to ocean views however the topography limits locations where views are available. The south-eastern portion is the highest point of the site and from there the topography falls to the north-east corner.

SITE 11C: 'BOORINGA ROAD, PRINCETOWN', LOT 2 PS508387, PARISH OF WAARRE



Views from the site towards the coastline

The third site is a small farm situated on just under 80 hectares located on Booringa Road, approximately 1 kilometre from the Great Ocean Road. The site contains a group of buildings set back a small distance from Booringa Road which are visible from the access area to the property. Most of the site is screened by vegetation in views from the road. The site has access to long-range views to the coast and is set on rolling topography which increases in elevation towards the northern boundary of the site.

10.15.3. ASSESSMENT FRAMEWORK

SITE AREA:

SITE 11A: 90 HA

SITE 11B: 130 HA

SITE 11C: 80 HA

PLANNING SCHEME

Zone	All sites are located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	SLO3, Great Ocean Road Landscape Area applies to Sites 11A and 11B and takes in a wider area to the west. Site 11C is not affected by any overlays.
MSS	While none of the sites are specifically referenced in the MSS or local planning policy, their proximity to the Twelve Apostles, Loch Ard Gorge, the Port Campbell National Park and the Great Ocean Road/coastline in general relates them to frequent references in the MSS. The area is noted by Clause 21.01 Municipal Profile as a key feature which attracts large numbers of tourists.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being on an exposed part of the coastline, the precinct may be subject to environmental constraints such as erosion, wind and salt spray.

KNOWN CULTURAL HERITAGE VALUE

- Parts of each of the sites are within areas of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV). These appear to be associated with water bodies, waterways and coastal crown land.

LANDSCAPE OR SCENIC VALUES

- Sites 11A and 11B are identified as part of a wider significant landscape as described in SLO3. Site 11B contributes most notably to the landscape being located on and visible from the Great Ocean Road. The landscape in this location is highly valued for the experience of travelling along the Great Ocean Road, which is “highlighted by sequences of enclosure within the scrub interspersed with spectacular views of coastal features and the ocean to the south, and expansive vistas across rolling pastoral land to the north”.

EXISTING OR AVAILABLE INFRASTRUCTURE

- All sites are accessed via roads off the Great Ocean Road (Road Zone 1) including Yaruck Road and Booringa Road.
- Loch Ard Gorge (the western extent of the Twelve Apostles), is 6.2 kilometres from Port Campbell to the west, and Booringa Road (the eastern extent of the Twelve Apostles) is 6 kilometres from Princetown to the east.
- There may be opportunities to utilise services associated with the existing Visitor Amenity Centre and the proposed interpretative centre.

10.15.4. PLANNING CONSIDERATIONS

The location of the precinct within close proximity of the Twelve Apostles and National Park surroundings mean that this area is highly sensitive to development. Although the existing Rural Conservation Zone prohibits most tourism-related development, any proposal to rezone land within the precinct to allow tourism development has the potential to significantly alter this nationally significant landscape.

Being sited away from the Great Ocean Road and already comprising tourist accommodation, Site 11A could be redeveloped or expanded subject to Council approval. Any expansion or redevelopment of this facility would need to consider its impact on the National Park which surrounds it on two sides. It would also need to comply with SLO3.

Site 11B is opportunely located close to the Great Ocean Road and coastline but is also on a prominent site visible from the key viewing corridor of the Great Ocean Road. The site has been identified as a potential location for self-contained accommodation. Although highly sought-after views would be available from parts of this site, any development would be constrained by the need to reduce its prominence along this undeveloped part of the coastline. If the site to the west in the National Park were to be developed for the proposed interpretative centre, there would be a greater rationale for allowing a development to occur on this site. Shared access could be considered, reducing the impact on the National Park which currently provides a buffer between the Great Ocean Road and the site. Any new buildings on this site would need to be sensitively designed, avoiding the appearance of one single building footprint, in favour of smaller detached buildings that would have a lower profile within the landscape.

Site 11C is conveniently located on Booringa Road off the Great Ocean Road which provides an advantage for the development of self-contained accommodation. It is also unaffected by the SLO which, if rezoned, would allow a development to occur more easily than Sites 11A and 11B, although any buildings should still have regard to the GORRS guidelines and other siting and design guidelines.

10.15.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

The existing Rural Conservation Zone is restrictive in terms of allowing the types of accommodation that have been identified for these sites. The Rural Activity Zone would provide more flexibility in allowing for the development of self-contained accommodation. Site 11B should only be rezoned to allow for self-contained accommodation in the event that the site to the west is selected for the development of the interpretative centre. This will provide the opportunity for any new development to be responsive to the design of the interpretative centre.

SITING AND DESIGN

If development is to occur on Sites 11A, 11B or 11C, the following guidelines should be applied:

Sites 11A:

- Any new buildings should be well set back from road boundaries and screened by vegetation.

Site 11B:

- Any new development on this site should consider the siting and design of the proposed interpretative centre. If possible access between the two sites from the Great Ocean Road should be shared.
- New buildings should avoid the appearance of one single building footprint in favour of smaller detached buildings that would have a lower profile within the landscape, such as individual cabins or units.
- New buildings should be low scale (i.e. one storey) and designed to follow the contours of the site.
- New development should avoid locations on the highest contours of the site (i.e. the eastern half of the site).
- Any new development should be designed to reflect the natural surroundings, including through the use of appropriate materials in muted colours and retention of existing vegetation wherever possible.

Site 11C

- Any new buildings should be well set back from road boundaries and screened by vegetation.
- New development should avoid locations on the highest contours of the site.
- Buildings should be designed to follow the contours of the site.
- Any new development should be designed to reflect the natural surroundings, including through the use of appropriate materials in muted colours and retention of existing vegetation wherever possible.

In addition, any new development should meet or consider the requirements and guidelines of:

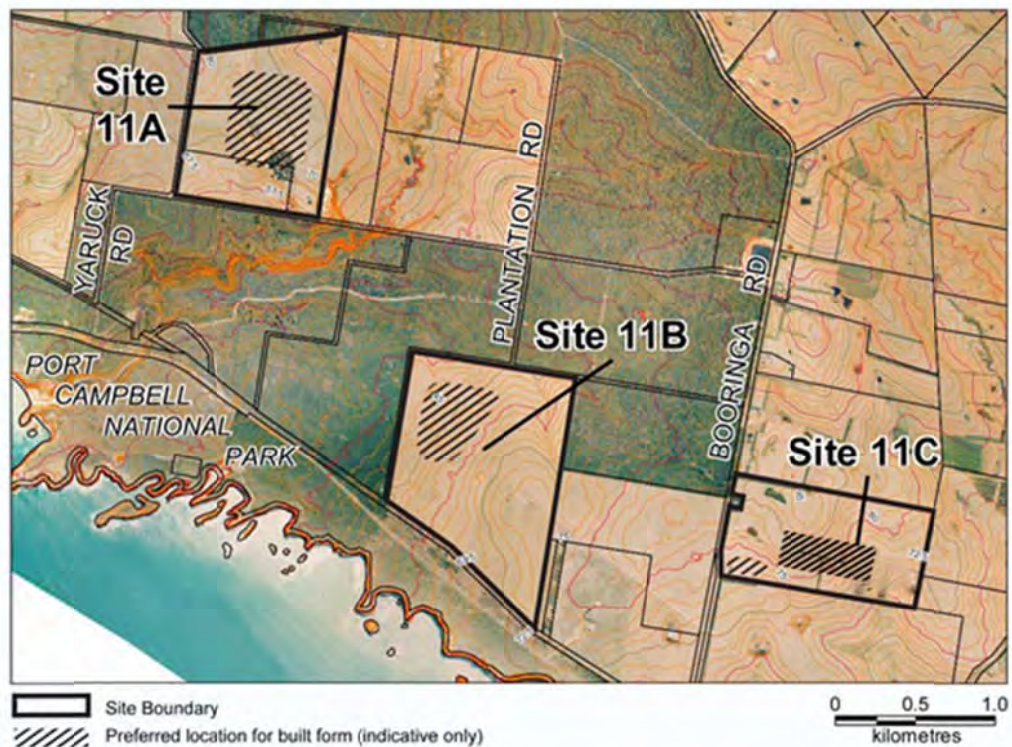
- The Rural Conservation Zone, or the Rural Activity Zone should this be applied.
- Existing (and proposed revised) Significant Landscape Overlay (SLO3).
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.

- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

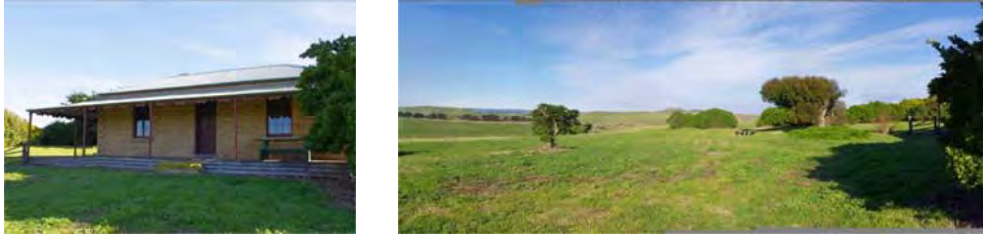
It is recommended that:

- Site 11A is rezoned to the Rural Activity Zone in the event that development on the site to the south commences for use as an interpretative centre.
- Site 11C is rezoned to the Rural Activity Zone immediately.
- Site 11B is rezoned to the Rural Activity Zone in the event that development on the site to the west commences for use as an interpretative centre.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.16. SITE 12: 'GLENAMPLE HOMESTEAD'

LOTS 17 AND 18, TP130811, PARISH OF LA TROBE



Glenample Homestead (left) and view from the site of the Homestead looking east

10.16.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The site is conveniently located in proximity to Princetown / Great Ocean Road and Twelve Apostles approximately 4.5 kilometres west of the Princetown township, with direct access available from the Great Ocean Road. The site is the location of the historic Glenample Homestead, a heritage listed building which is sited on Crown Land and leased by Parks Victoria but has been closed indefinitely to the public. The site was previously used as a stop-off for people undertaking the Great Ocean Walk and contains tea rooms that were open to the public. The building was constructed in 1869 by pioneer pastoralist Hugh Gibson from locally quarried sandstone.

POTENTIAL USES

The site has been identified for its potential for use to capitalise on its heritage values and provide for a caravan park and camping, interpretation centre, residential hotel and restaurant.

The heritage building could be restored for use as restaurant or common area facilities while additional overnight or longer stay accommodation could be developed external to the existing building.

10.16.2. SITE DESCRIPTION

The site is split across two parcels and is located between the Great Ocean Road and Princetown Road. The Glenample Homestead is well set back, approximately 285 metres from the Great Ocean Road and is accessible via a winding access track that follows the contours of the site. The building is not visible from the Great Ocean Road due to the topography, which rises steeply from the road to a high point at the south-west corner of the site. The topography falls to the north of this high point towards a valley which runs from the west to the east boundary of the site.

10.16.3. ASSESSMENT FRAMEWORK

SITE AREA: 61.3 HA

PLANNING SCHEME

Zone	The site is located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	Proposed SLO4 Princetown Estuarial Landscape applies to the site. Listed on the Victorian Heritage Register (Heritage Victoria responsible) The Heritage Overlay (HO58) applies to both parcels of land and is identified as "Glenample Homestead, Simpson Road, Princetown".
MSS	While the site is not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire. The site comprises a heritage building which associates it with any general references towards heritage in the LPPF. The site is located in close proximity of Princetown, which according to Clause 21.02 Key Influences, Princetown, is a town in name only and supports a permanent population of about a dozen people.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being on an exposed part of the coastline, the site may be subject to environmental constraints such as erosion, wind and salt spray.

KNOWN CULTURAL HERITAGE VALUE

- The site is located in an Area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).
- The homestead is of post-settlement cultural heritage value given its pioneer/pastoral history.
- The Heritage Overlay (HO58) applies to both parcels as well as the parcel of land to the east (Glenample Homestead, Simpson Road Princetown).
- The site is also on the Victorian Heritage Register (VHR) Number H0392.

LANDSCAPE OR SCENIC VALUES

- The site is within an area of identified landscape significance, as defined by the Great Ocean Road Region Landscape Assessment Study. It is proposed to be included in SLO4 (Princetown Estuarial Landscape).

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has direct access off the Great Ocean Road (Road Zone 1).

10.16.4. PLANNING CONSIDERATIONS

The homestead appears in need of restoration; however, the uses allowed under the existing Rural Conservation Zone are restrictive in terms of the types of uses that could provide economic support to the homestead, such as additional accommodation. Subject to the heritage values of the site and the requirements of the Heritage Overlay / Heritage Victoria, the homestead could be restored and used as a guesthouse or restaurant. The topography of the site would allow additional buildings to be

sensitively designed and sited to the north of the homestead without detracting from the heritage values of the original building.

10.16.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

The existing Rural Conservation Zone is restrictive both in terms of the size and scale of accommodation allowed and the use of land for a restaurant not associated with agriculture, rural industry or a winery. The Rural Activity Zone would provide more flexibility in allowing for the types of opportunities identified on the site.

SITING AND DESIGN

It is recommended that if any new buildings are developed on the site, that the following guidelines be applied:

- New buildings should be located outside the east-west viewshed available from the homestead.
- New development should be sited to the north of the homestead on the downward slope towards the valley.
- New buildings should be designed to follow the contours of the site.
- New buildings should be sensitively designed and located to respect the heritage significance of the homestead and gardens.

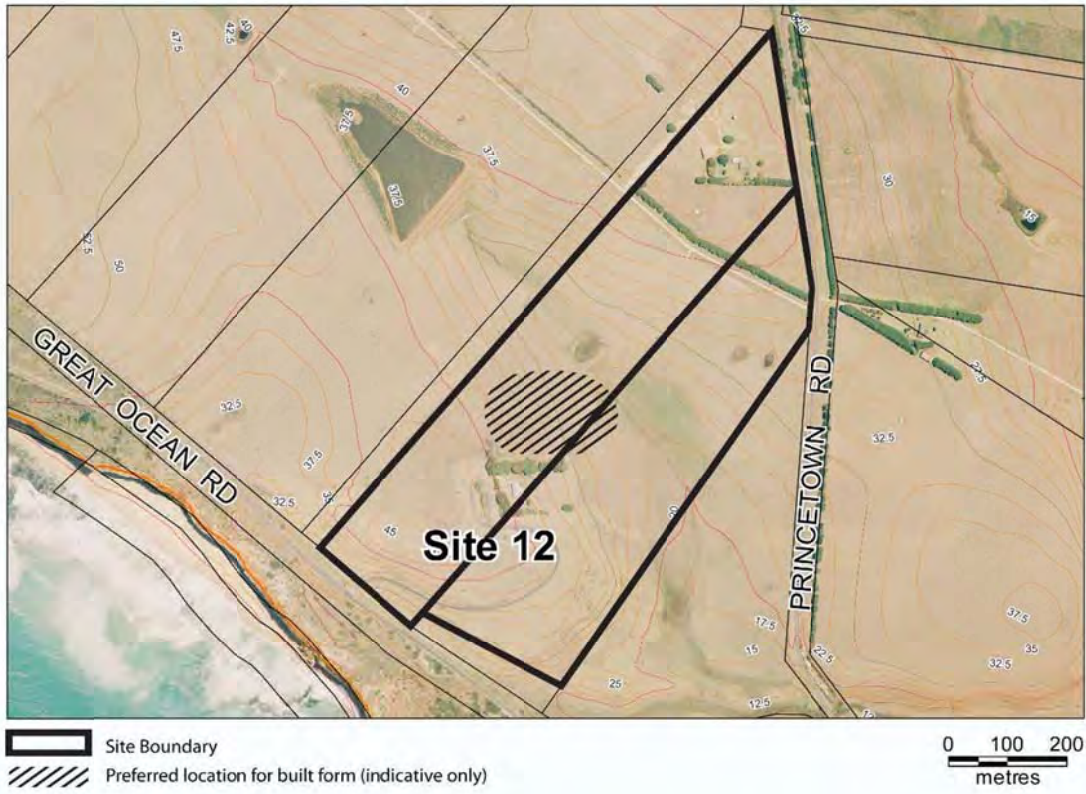
In addition, any new development should meet or consider the requirements and guidelines of:

- The Rural Conservation Zone or the Rural Activity Zone, should this be applied.
- Heritage Overlay (HO58).
- The proposed Significant Landscape Overlay (SLO 4).
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- The site is rezoned to the Rural Activity Zone.
- Development only be approved in association with the refurbishment of the homestead and used for tourism purposes.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.17. PRECINCT 13: 'KANGAROOBIE, PRINCETOWN, GELLIBRAND LOWER'

LOT 1 TP251582 (SITE 13A), LOT 1 TP231273 (SITE 13B), CROWN ALLOTMENT 2B SECTION A (SITE 13C), CROWN ALLOTMENT 141 (SITE 13D), CROWN ALLOTMENT 142 (SITE 13E), PARISH OF LA TROBE



View from Site 13E towards the coastline

10.17.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The precinct is located between the Great Ocean Road and the Old Ocean Road which follows the course of the Gellibrand River to the south. The precinct is in a unique setting suited to nature based activities including water based activities and links to the Great Ocean Walk which traverses through the area. The sites are elevated well above sea level with long-range views of the coast and rural hinterland. Landforms and vegetation cover allow for tourism development to be discretely located below ridgelines and vegetation.

POTENTIAL USES

The site is currently used for a school camp and informal accommodation for tourists. There is opportunity to build on the nature based tourism potential of the location, particularly with regard to providing accommodation for walkers such as a backpackers lodge, group accommodation or residential hotel.

10.17.2. SITE DESCRIPTION

The site comprises seven separate parcels, the closest of which is located 2.1 kilometres east of Princetown along the Old Ocean Road. Two small parcels are located on the western side of the Old Ocean Road, while the remainder are located to the east. The two eastern parcels are located on the Great Ocean Road. The precinct is located on rolling hills incised with watercourses and valleys. It is heavily vegetated in parts, particularly along the watercourses and valleys where vegetation is likely to be native or indigenous.

The precinct is predominantly used for the Kangarooobie outdoor education camp which consists of several buildings set back 18 metres from the Great Ocean Road. Due to the topography and an established vegetation buffer along the Old Ocean Road, none of the sites are visible from this road.

The two properties on the Great Ocean Road are also largely screened in views by vegetation along the roadside. Long-range coastal views are available from the western portion of this area.

10.17.3.ASSESSMENT FRAMEWORK

SITE AREA: 379.1 HA (TOTAL)

PLANNING SCHEME

Zone	The site is located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	The Wildfire Management Overlay (WMO) applies to parts of each site, near areas of dense vegetation. Proposed SLO4 Princetown Estuarial Landscape applies to the two sites west of the Old Ocean Road
MSS	While the sites are not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire. The precinct is located in close proximity of Princetown, which according to Clause 21.02 Key Influences, Princetown, is a town in name only and supports a permanent population of about a dozen people.
LPP	The precinct is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- The site is located within close proximity of the Gellibrand River. It is likely that water runoff occurs from the site to the River.
- The site is likely to contain native or indigenous vegetation.

KNOWN CULTURAL HERITAGE VALUE

- Parts of the precinct are located in areas of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- Proposed SLO4 Princetown Estuarial Landscape applies to the two sites west of the Old Ocean Road.
- The precinct is likely to be highly scenic based on its topography and vegetation patterns however very little of the entire precinct is visible from key viewing locations or roads.

EXISTING OR AVAILABLE INFRASTRUCTURE

- At its western extent the precinct has access to the Old Ocean Road, which is unsealed in this location.
- The two eastern parcels are located on the Great Ocean Road.

10.17.4.PLANNING CONSIDERATIONS

The primary consideration for sites within the precinct is the location of development in relation to visibility from the Great Ocean Road and the Old Ocean Road. There are opportunities to reduce visibility through the siting of new development in relation to the topography, as well as through the use of existing vegetation as screening.

A new self-contained accommodation development could be discretely located on the western portion of Site 13D. Any buildings in this location should be tucked into the topography and screened with

vegetation avoiding visibility from the Great Ocean Road. There is also potential for walker accommodation to be located on Site 13B, east of the Old Ocean Road. Any new buildings in this location should be screened by vegetation in views from the roadside.

10.17.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

The existing Rural Conservation Zone is restrictive in terms of allowing self-contained and walker accommodation. The Rural Activity Zone would be more flexible in allowing limited uses including those outlined above. It is not recommended that the entire precinct be rezoned, rather that rezoning occurs on selected parcels or portions of parcels based on the recommended siting of new development.

SITING AND DESIGN

If development is to occur within the precinct, the following guidelines should be applied:

- New buildings should be well set back from road boundaries.
- New buildings should avoid the appearance of one single building footprint in favour of smaller detached buildings that would have a lower profile within the landscape.
- New buildings should be low scale and designed to follow the contours of the site.
- New buildings should be screened in views from the Great Ocean Road and the Old Ocean Road by existing vegetation.

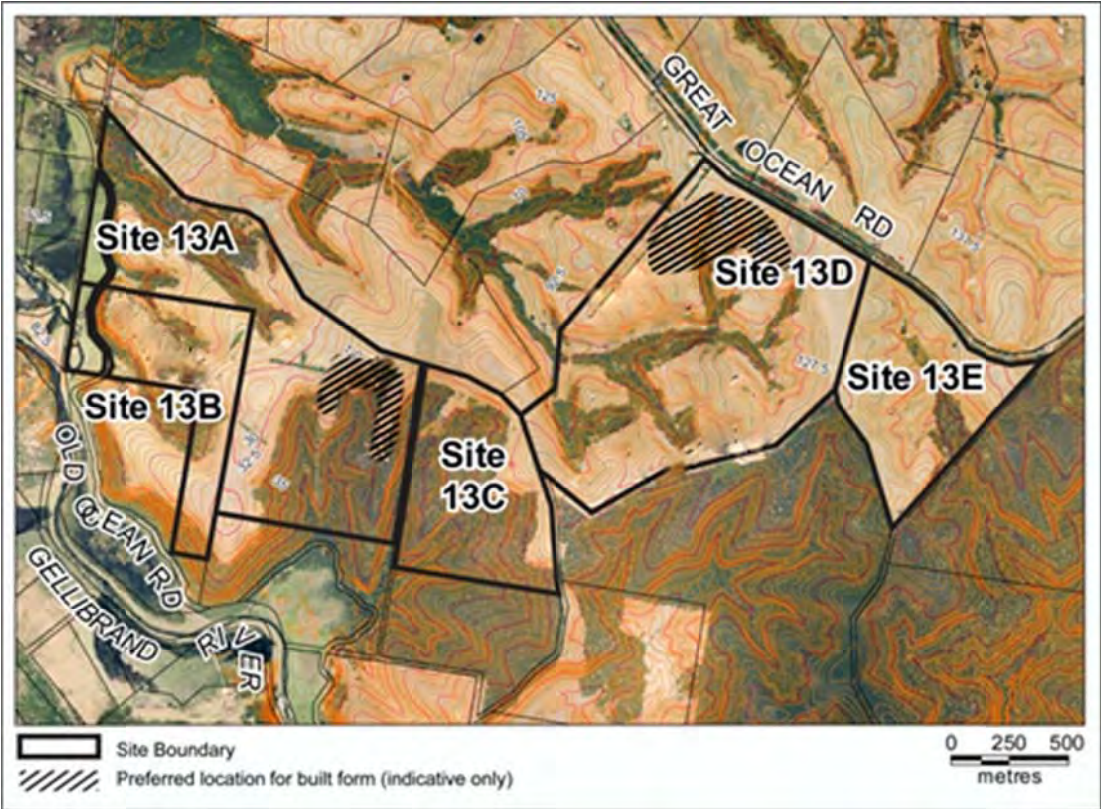
In addition, any new development should meet or consider the requirements and guidelines of:

- Requirements of the Rural Conservation Zone, or the Rural Activity Zone should this be applied.
- Wildfire Management Overlay.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- Site 13A (the existing Kangaroo Camp) is rezoned to the Rural Activity Zone.
- Site 13B is rezoned to the Rural Activity Zone, to allow for walker accommodation.
- Part of Site 13D is rezoned to the Rural Activity Zone allow for self-contained accommodation.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.18. PRECINCT 14: 'PRINCETOWN EAST'

CROWN ALLOTMENT B (SITE 14A), CROWN ALLOTMENT A (SITE 14B) AND CROWN ALLOTMENT 18B (SITE 14C), PARISH OF WANGERRIP



View from the Old Ocean Road across the Gellibrand River, looking towards the Great Ocean Walk (not visible)

10.18.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The precinct is well located within proximity of the coastline and the Great Ocean Walk, which traverses the land directly to the south of the precinct. The topography of the site also provides the opportunity to site buildings with minimised visibility from the coast.

POTENTIAL USES

The precinct provides opportunities for self-contained nature based cabins (backpackers lodge or group accommodation) which could be marketed as walker accommodation. The type of accommodation envisaged is similar to that provided along the Overland Track between Cradle Mountain and Lake St Claire in Tasmania.

10.18.2. SITE DESCRIPTION

The precinct comprises three parcels located between the Gellibrand River to the north and the Otway National Park and coastline to the south. The topography declines dramatically towards the River valley along the northern boundary of the precinct. The precinct is not visible from the coastal edge due to the elevated topography of the National Park to the south, which acts as a buffer between the precinct and the ocean. The western and eastern extents of the precinct contain dense vegetation that flows across the National Park boundary. An existing camp site is located at to the south of the precinct and is used as a stopover on the Great Ocean Walk. The precinct is located approximately 5 kilometres east of Princetown along the Old Ocean Road. Access is very limited to all sites due to the location of the River between the sites and the Old Ocean Road. There is a bridge across the River which is accessible off Coxans Access Track off the Road.

10.18.3.ASSESSMENT FRAMEWORK

SITE AREA: 191.2 HA (TOTAL)

PLANNING SCHEME

Zone	The site is located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	Proposed SLO4 Princetown Estuarial Landscape applies to all three parcels. The Wildfire Management Overlay (WMO) applies to all three parcels. The Environmental Significance Overlay (ESO1) applies to the Gellibrand River as well as a buffer zone around the River, which affects the north parts of all three parcels.
MSS	While the sites are not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being located in a coastal area, the precinct may be subject to environmental constraints such as erosion, wind and salt spray.
- There are environmental sensitivities related to the Gellibrand River, which traverses along the northern boundary, just outside the precinct. ESO1 identifies the River and the northern part of the precinct as being of environmental significance.
- The precinct is likely to contain indigenous and/or native vegetation.

KNOWN CULTURAL HERITAGE VALUE

- The site is within an Area of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV), although this should be checked in greater detail - it is likely that this is only associated with the coastal area / National Park and the Gellibrand River.

LANDSCAPE OR SCENIC VALUES

- Proposed SLO4 Princetown Estuarial Landscape applies to all sites.
- The SLO notes that views are largely contained within this area in the rise up to the coastline.
- Despite the lack of direct views to the coastline, the topography, vegetation and water features within the precinct contribute to this being a highly scenic landscape.
- Although not visible from the coast, the precinct is visible from the Old Ocean Road and parts may be visible from the Great Ocean Walk.

EXISTING OR AVAILABLE INFRASTRUCTURE

- The site has access to the Old Ocean Road.
- Access to the site is limited due to topography and the Gellibrand River.
- It is likely that any new development would need to be self-sufficient.

10.18.4. PLANNING CONSIDERATIONS

The primary consideration for this precinct is the visibility of development from the Old Ocean Road and the Great Ocean Walk. One of the benefits of this precinct is its topography which slopes down away from the coast towards the Gellibrand River providing an opportunity to site development to avoid visibility from the coastline. The precinct is, however, still within a sensitive location between the coast and the river and is prominent in views from the Old Ocean Road. Site 14A is also visible in views from the Great Ocean Walk.

Any development in the precinct would need to be highly sensitive to the ecological characteristics of the site including the River. Access to the site may be problematic - the site is remote from any major townships, is some distance from the Great Ocean Road and is only accessible via a track off the Old Ocean Road which is unsealed.

In addition, any new development should meet or consider the requirements and guidelines of:

- The Rural Conservation Zone, or the Rural Activity Zone should this be applied.
- Proposed Significant Landscape Overlay (SLO4).
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.

10.18.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

It is recommended that only one of the sites or part of the precinct be rezoned to the Rural Activity Zone to allow an eco-tourism development to occur.

SITING AND DESIGN

All sites are visible from the Old Ocean Road and none of the three parcels appear to provide a greater level of suitability on this basis. Existing vegetation may provide an opportunity to screen buildings. Access to any part of the precinct would need to be gained through the parcel to the east over the existing bridge via Coxans Access Track.

Investigations have been carried out to determine preferred locations for an eco-tourism development in the precinct. Site14B (Gully Site) option provides the best siting response in terms of the landscape significance of the area. Development in this location would be largely screened in views from both the Old Ocean Road and the Great Ocean Walk. The removal of existing vegetation on the site should be avoided. Any development on Site 14A would need to be screened in views from the Great Ocean Walk, particularly where the Walk directly abuts the southern boundary of the site. Access to Site 14A would require access roads or tracks longer than those needed for any development on Site 14B.

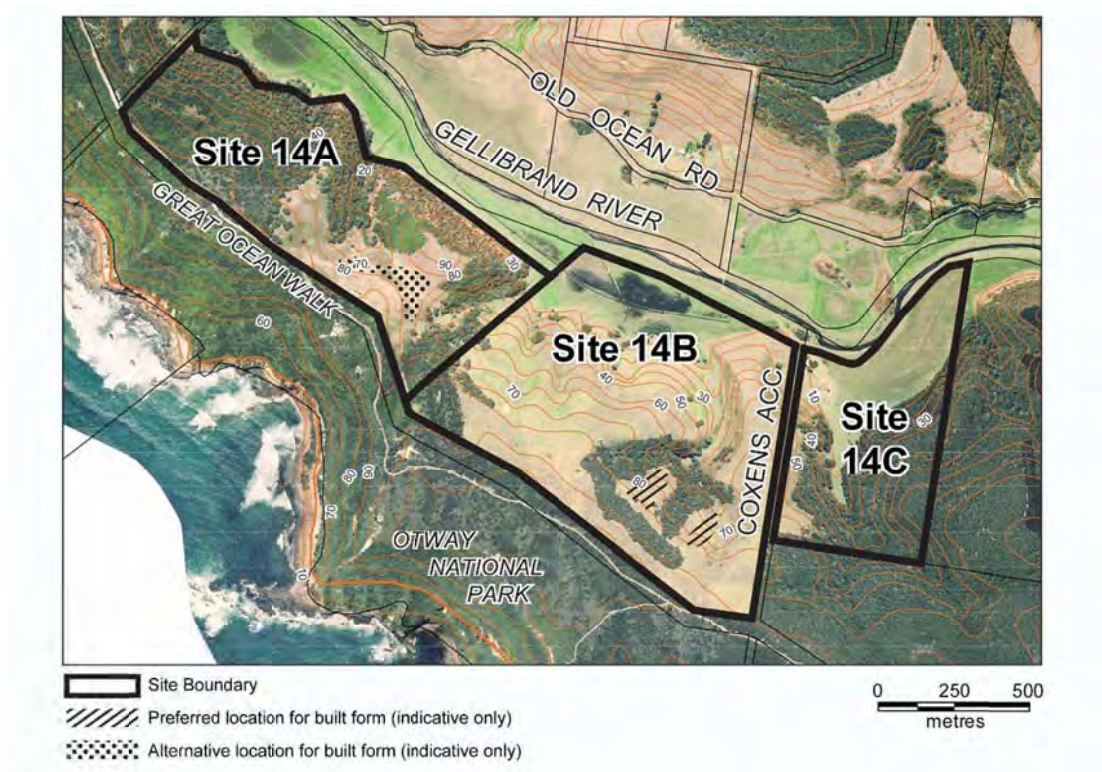
If development is to occur on the site, the following guidelines should be applied:

- Development should have a strong eco-tourism focus and should prioritise the conservation of the surrounding environment.
- Buildings should not be sited on the ridgeline or on hill tops.
- Buildings should be low scale and designed to follow the contours of the site.
- Materials should complement the surrounding landscape, minimising the prominence of buildings in views from the Old Ocean Road.
- Built form should be screened in views from the Old Ocean Road.
- If new development is to be located on Site 14A, vegetation should be used to screen buildings from the Great Ocean Walk without compromising views from key vantage points.
- Vehicle access to any new accommodation should be minimised. Access to the development should be provided for walkers via the Great Ocean Walk wherever possible.
- New access roads or tracks should be constructed of permeable materials.

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- Part or all of Site 14B is rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the 'preferred location for built form', shown on the map below.



10.19. PRECINCT 15: 'MOONLIGHT HEAD WEST'

CROWN ALLOTMENT 27 (SITE 15A), LOT 2, PS500657 (SITE 15B), LOT 1, PS500657 (SITE 15C)
AND CROWN ALLOTMENT 33 (SITE 15C), PARISH OF WANGERRIP

10.19.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The precinct is set within one of the most scenic landscapes along Victoria's coastline. It has a sense of seclusion derived from the surrounding forest as well as the rugged coastline that runs along the southern boundary of some of the properties. Vegetation in the precinct is tall and dense, containing views in most parts of the precinct except on cleared sites.

POTENTIAL USES

The precinct has been identified as a potential location for tourism related uses including backpackers lodge, bed and breakfast, group accommodation or residential hotel to build on the wilderness and nature based tourism potential of the setting.

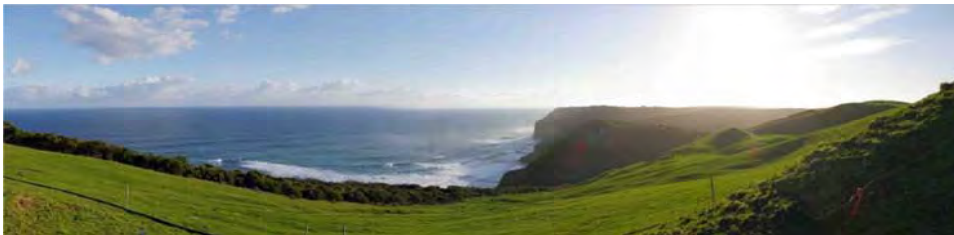
The growing popularity of the Great Ocean Walk and the limited accommodation options available indicates that there is an opportunity to provide such uses in this location. The type of accommodation envisaged could be similar to that provided along the Overland Track between Cradle Mountain and Lake St Claire in Tasmania.

In addition to accommodation aimed at users of the Great Ocean Walk, there is also an opportunity to provide luxury self-contained accommodation with views of the coastal edge assessed from the Great Ocean Road. The only site that would offer such views is the cleared site at the southern edge of the precinct (Site 15A).

10.19.2. SITE DESCRIPTION

The precinct is split across ten parcels of land located south of the Great Ocean Road at Moonlight Head.

SITE 15A: 220 PARKERS ACCESS TRACK, WATTLE HILL



View from the southern boundary of the site towards the coastline

Site 15A is the southern-most property and is accessible only via Parkers Access Track. The site is largely cleared and used for dairy farming but is surrounded by the forested land of the Cape Otway National Park. There is a dwelling located at the southern boundary of the site, accessible via a private track. This site has some of the most spectacular views in the precinct due to the dramatic topography which drops suddenly to the ocean south of the precinct.

SITES 15B (50 PARKERS ACCESS TRACK) AND 15C (MOONLIGHT HEAD ROAD)

Sites 15B and 15C are located on the northern side of Parkers Access Track but Site 15C also has a frontage to Moonlight Head Road. Moonlight Retreat, which includes several self contained cottages, is located on Site 15B. Both are narrow parcels of land with patches of dense vegetation.

SITE 15D: 35 PARKERS ACCESS TRACK, WATTLE HILL

Site 15D is just over 42 hectares in size and is located to the east of Parkers Access Track. Approximately half the site is cleared, while the other half is dominated by forested land which flows across the boundary to the National Park. The Moonlight Head Private Lodge is located on the site and comprises three self-contained units.

10.19.3. ASSESSMENT FRAMEWORK

Site Area:

15A: 49.98 HA

15B: 2.6 HA

15C: 4.2 HA

15D: 42.2 HA

PLANNING SCHEME

Zone	The site is located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	Proposed SLO5, Moonlight Head applies to all parcels, except a small part of sites 15B and 15C. The Wildfire Management Overlay (WMO) applies to all parcels. The Vegetation Protection Overlay (VPO) applies to all parcels.
SPPF	Great Ocean Road Landscape Assessment Study recognises the landscape as being of State significance.
MSS	While the sites are not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being on an exposed part of the coastline, the precinct may be subject to environmental constraints such as erosion, strong winds and salt spray.
- The site contains significant and remnant vegetation as identified by VPO1.

KNOWN CULTURAL HERITAGE VALUE

- The sites may contain areas of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- The precinct is within an area of identified landscape significance, as described by the proposed Significant Landscape Overlay (SLO5), which applies to all sites except a portion of those to the north-west of Parkers Access Track.

EXISTING OR AVAILABLE INFRASTRUCTURE

- Sites 15A-15D are accessible via Parkers Access Track, which is unsealed. A four-wheel drive is recommended to access the southern parts of the precinct.

10.19.4. PLANNING CONSIDERATIONS

The key planning consideration in the precinct is the need to protect the nationally significant wild and remote landscape that characterises Moonlight Head, which is a major drawcard for tourism. Part of this consideration involves minimising the visibility of development and ensuring that where buildings are visible, they are sensitive to the surrounding landscape. The proposed SLO and existing VPO that apply to the site assist in achieving this objective.

10.19.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

In order for the development of self-contained accommodation unrelated to agriculture, rural industry or a winery to occur, Site 15A would require rezoning from the Rural Conservation Zone to the Rural Activity Zone. The rezoning of Sites 15B, 15C and 15D from Rural Conservation to Rural Activity would also ensure that the zoning is consistent with their current use for accommodation.

SITING AND DESIGN

Site 15A could be developed with self-contained accommodation dependent on a design that complies with the proposed SLO5, as well as the removal of the existing dwelling on the site. The siting and design of the development should reduce the need for cut and fill and consider the appearance of building/s in views from Parkers Access Track.

Another siting and design issue within the precinct is access. Apart from the limited connection of the precinct with the Great Ocean Road, access is only available via Parkers Access Track and the Great Ocean Walk. New development should be sited with this as a key consideration.

If new development occurs on Site 15A the following guidelines should be applied:

- New buildings and access roads should be sited and designed to minimise the need for cut and fill.
- New buildings should be low scale and designed to follow the contours of the site.
- New development should be sited and designed to minimise views of the buildings and access roads from the Moonlight Head Road, Parkers Access Track and the Great Ocean Walk track.
- New development should be constructed to withstand environmental impacts such as strong winds.

In addition, any new development should meet or consider the requirements and guidelines of:

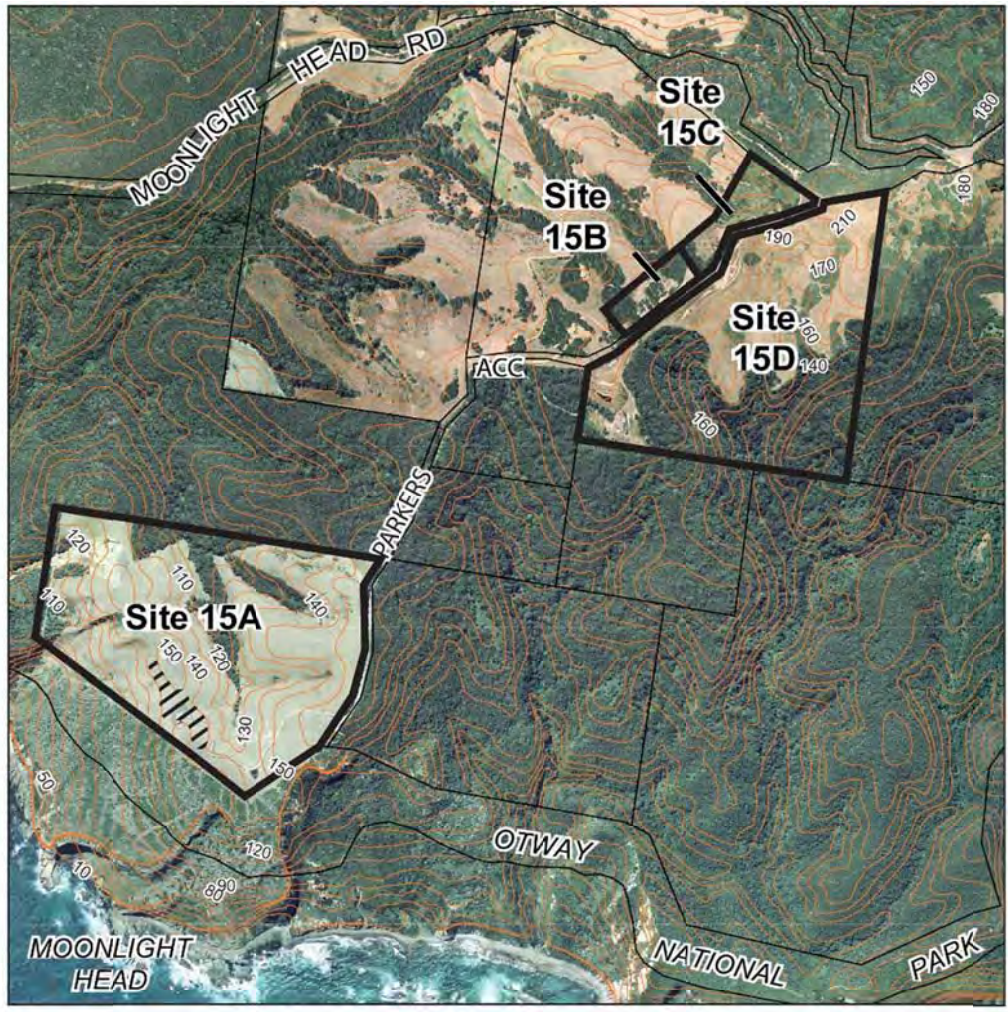
- The Rural Conservation Zone or the Rural Activity Zone should this be applied.

- Proposed Significant Landscape Overlay (SLO5).
- The Vegetation Protection Overlay (VPO1).
- The Wildfire Management Overlay.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- Sites 15A, 15B, 15C and 15D are rezoned to the Rural Activity Zone.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the area designated 'preferred location for built form', shown on the map below.



Site Boundary
 Preferred location for built form (indicative only)

0 500
 metres

10.20. PRECINCT 16: MOONLIGHT HEAD EAST

CROWN ALLOTMENT 34 (SITE 16A), CROWN ALLOTMENT 35 (SITE 16B), CROWN ALLOTMENT 39 (SITE 16C), CROWN ALLOTMENT 36 (SITE 16D), CROWN ALLOTMENT 38 (SITE 16E) AND LOT 1 LP129172 PARISH OF WANGERRIP (SITE 16F)

10.20.1. POTENTIAL TOURISM OPPORTUNITIES

LOCATIONAL STRENGTHS

The precinct is located within one of the most scenic landscapes along the Victorian coastline. The precinct is bounded to the north by the Great Ocean Road and to the south by the Otway National Park. The precinct has a sense of seclusion derived from the surrounding forest as well as the limited access available to the southern part of the precinct. Tall and dense vegetation screens views across parts of the precinct, however views are available from cleared sites out to the ocean.

POTENTIAL USES

The Catholic Church has expressed interest in the development of an education centre and residential college in the precinct. As with land at Moonlight Head West, the precinct has been identified as an area that could provide for walker accommodation (backpackers lodge, bed and breakfast, group accommodation or residential hotel) to serve the growing popularity of the Great Ocean Walk. The Catholic Church has also expressed interest in development of this type within the precinct.

10.20.2. SITE DESCRIPTION

The precinct is split across six parcels of land located south of the Great Ocean Road at Moonlight Head. The precinct is owned by the Catholic Church and is currently undeveloped apart from three dwellings, only one of which is currently in use. The three northern-most parcels are located close to the Great Ocean Road but are screened by dense vegetation.

10.20.3. ASSESSMENT FRAMEWORK

Site Area:

15A-15F: 197.5 HA (TOTAL)

PLANNING SCHEME

Zone	The site is located in the Rural Conservation Zone. Schedule 1 to the Rural Conservation Zone applies.
Overlays	Proposed SLO5, Moonlight Head applies to all parcels. The Wildfire Management Overlay (WMO) applies to all parcels. The Vegetation Protection Overlay (VPO) applies to all parcels.
SPPF	Great Ocean Road Landscape Assessment Study recognises the landscape as being of State significance.
MSS	While the sites are not specifically referenced in the MSS or local planning policy, it is part of the wider coastal area which features frequently throughout the MSS as the key feature of the Shire.
LPP	The site is not mentioned in any local planning policies.

ENVIRONMENTAL / ECOLOGICAL / GEOLOGICAL CONSTRAINTS ON OR SURROUNDING THE SITE

- Being on an exposed part of the coastline, the precinct may be subject to environmental constraints such as erosion, strong winds and salt spray.
- The site contains significant and remnant vegetation as identified by VPO1.

KNOWN CULTURAL HERITAGE VALUE

- The sites may contain areas of Cultural Heritage Sensitivity as identified by Aboriginal Affairs Victoria (AAV).

LANDSCAPE OR SCENIC VALUES

- The precinct is within an area of state identified landscape significance, as described by the proposed Significant Landscape Overlay (SLO5).

EXISTING OR AVAILABLE INFRASTRUCTURE

- Site 16A is accessible via Parkers Access Track, which is unsealed.
- Sites 16B and 16C adjoin the Great Ocean Road reserve but only Site 16B has direct access via a track to a dwelling.
- Sites 16A, 16B, 16D and 16F are also accessible via Cape Volney Track, which is unsealed, while Sites 16C and 16E are accessible via Ryan Den Track, also unsealed.
- A four-wheel drive is recommended to access the southern parts of the precinct.

10.20.4. PLANNING CONSIDERATIONS

The key planning consideration in the precinct is the need to protect the significant untouched and remote landscape that characterises Moonlight Head, which is a major drawcard for tourism. Part of this consideration involves minimising the visibility of development from outside the sites and ensuring that where buildings are visible, they are sensitive to the surrounding landscape. The proposed SLO and existing VPO that apply to the site assist in achieving this objective.

10.20.5. IMPLEMENTATION RECOMMENDATIONS

ZONING

The use of any land for education will require a rezoning to Special Use. The area of land to be rezoned should be determined based on the space needed for the education facility. The use of land for walker accommodation would require a rezoning to Rural Activity.

SITING AND DESIGN

The school campus could occur on an already cleared part of Site 16A or 16F, dependent on the size of the proposed building footprint. Views to the site from the Great Ocean Road would then be screened by vegetation. Walker accommodation would be ideally located closer to the southern boundary of the area, on a cleared part of a site. It is understood that a detailed landscape assessment of the site is currently being undertaken.

Another siting and design issue within the precinct is access. Apart from the limited connection between the precinct and the Great Ocean Road, vehicular access is only available via Cape Volney

and Ryan Den Tracks, as well as the pedestrian access from the Great Ocean Walk. New development should be sited with access constraints as a key consideration.

If new development occurs on Sites 16A to 16F the following guidelines should be applied:

- New buildings and access roads should be sited and designed to minimise the need for cut and fill, and removal of trees and understorey vegetation.
- New buildings should avoid the appearance of one single building footprint in favour of smaller detached buildings that would have a lower profile within the landscape.
- New buildings should be low scale and designed and sited to follow the contours of the site.
- New development should be sited and designed to minimise views of the buildings and access roads from the Great Ocean Road and the Great Ocean Walk track.
- New development should be constructed to withstand environmental impacts such as strong winds.

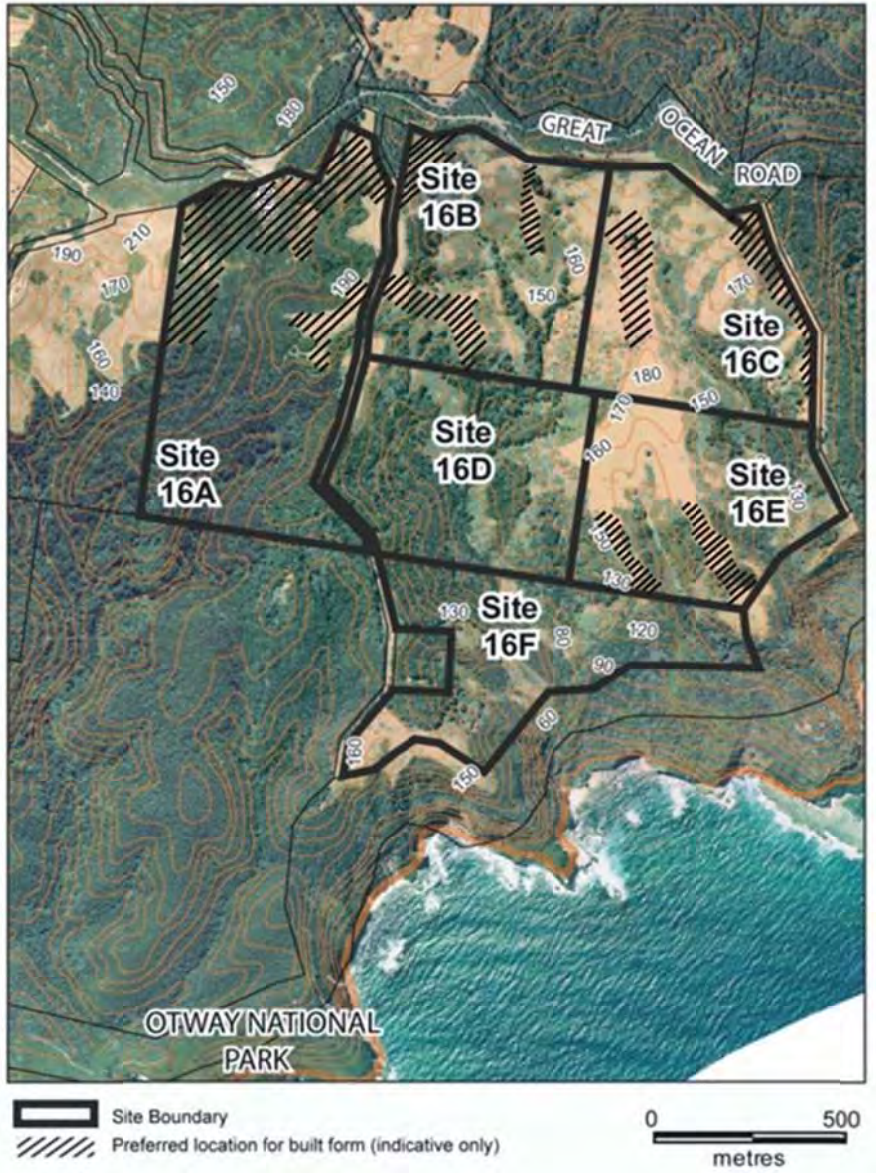
In addition, any new development should meet or consider the requirements and guidelines of:

- The Rural Conservation Zone or the Rural Activity Zone and Special Use Zone should these be applied.
- Proposed Significant Landscape Overlay (SLO5).
- The Vegetation Protection Overlay (VPO1).
- The Wildfire Management Overlay.
- Clause 22.03-4 Tourist Use and Development.
- Clause 22.04 Particular Use and Development.
- Siting and Design Guidelines for Structures on the Victorian Coast, May 1998.
- Great Ocean Road Region Landscape Assessment Study, DSE 2003.
- Nature Based Tourism Guidelines (draft).
- Aboriginal Affairs Victoria and any Aboriginal cultural heritage considerations.

SUMMARY OF RECOMMENDATIONS

It is recommended that:

- Sites 16A and 16B are rezoned to Special Use, subject to the preparation of a detailed master plan for the purposes of wilderness-based education.
- Sites 16C and 16E are rezoned to the Rural Activity Zone in order to provide for walker accommodation, subject to the preparation of a detailed master plan for the purposes of wilderness-based education.
- The siting and design of any buildings complies with the guidelines above.
- New buildings are located within the area designated 'preferred location for built form', shown on the map below.



10.21. SUMMARY OF RECOMMENDATIONS

The table below and the map on the following page provides a summary of recommended changes to accommodate the tourism opportunities as highlighted in Part A of this report. The recommended rezoning of Farming Zoned land to Rural Activity Zone and Special Use Zone has been considered carefully against the following considerations:

- Description of the site / precinct/ potential tourism use;
- Existing planning scheme controls including zones and overlays, as well as any reference to particular locations or land use types in the Municipal Strategic Statement (MSS) or Local Planning Policies (LPPs);
- Environmental or ecological constraints on or surrounding the site;
- Known cultural heritage issues and sites;
- Landscape or scenic values, identified through the site visit as well as through a review of existing documentation;
- Proximity to existing townships and their services;
- Existing or available infrastructure, including road and transport access as well as other utilities.

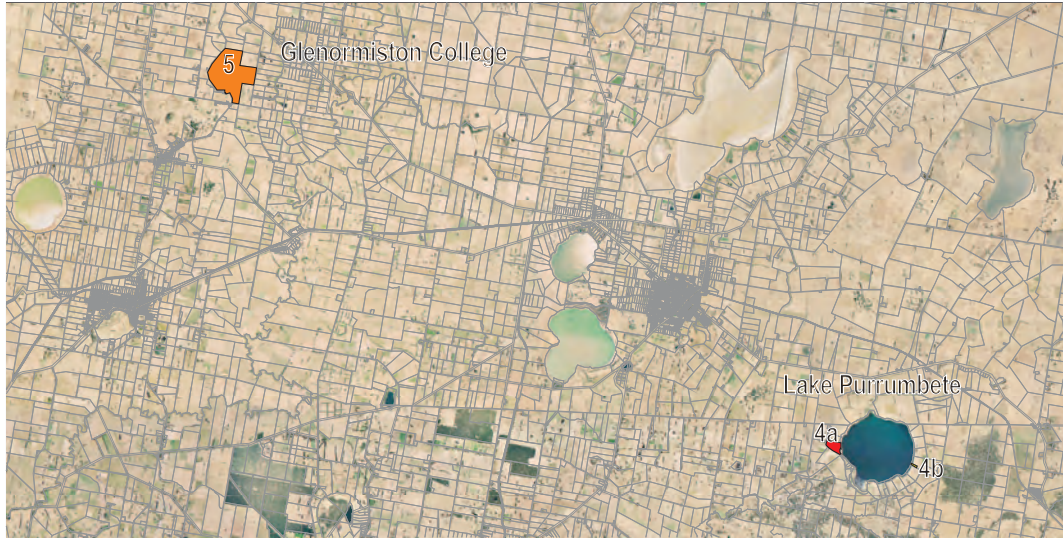
TABLE 18 SUMMARY OF RECOMMENDATIONS

Site Indicator	Precinct and Site Name	Lot Plan	Current Zone	Recommended Zone	Immediate Rezoning	DDO proposed	LPP proposed
1	'Glenelg Highway, Skipton'	Lot 2 LP78265, Parish of Skipton	Farming Zone	Rural Activity Zone	✓	✓	✓
2	'Mt Widderin Caves'	Lot 5 TP810977, Parish of Borriyalloak	Farming Zone	Rural Activity Zone			✓
3	'Mt Elephant, Derrinallum'	Lot 1 TP886368, Parish of Geelengla	Farming Zone	Special Use Zone	✓	✓	✓
4a	'Lake Purrumbete'	658 Purrumbete Estate Road, Lake Purrumbete, Lot 2 TP234554, Parish of Purrumbete South	Farming Zone	Rural Activity Zone	✓	✓	✓
4b	'Lake Purrumbete'	Lot 1 TP220902, Parish of Purrumbete South	Farming Zone	Farming Zone			
5	'Glenormiston College'	Crown Allotment 5, Parish of Glenormiston	Farming Zone	Special Use Zone	✓	✓	✓
6a	Timboon and Surrounds - 'Berry World'	Lot 1 TP166179, Parish of Timboon	Farming Zone	Rural Activity Zone	✓	✓	✓
6b	Timboon and Surrounds - 'Barrett Street, Timboon'	Lot 2 LP205437 and Lot 1 LP88072, Parish of Timboon	Farming Zone	Rural Activity Zone	✓	✓	✓
6c	Timboon and Surrounds	Lot 10 LP94831, Parish of Timboon	Farming Zone	Farming Zone			
7	'Scotts Creek General Store'	Lot 1 TP684191 Township of Scotts Creek	Farming Zone	Rural Activity Zone	✓	✓	✓
8	'Camp Cooriemungle'	Crown Allotment 10d Section C, Parish of Waarre	Farming Zone	Rural Activity Zone	✓	✓	✓
9	'Peterborough Airfield'	Lot 2 TP834074, Parish of Timboon	Rural Conservation Zone	Special Use Zone	✓	✓	✓

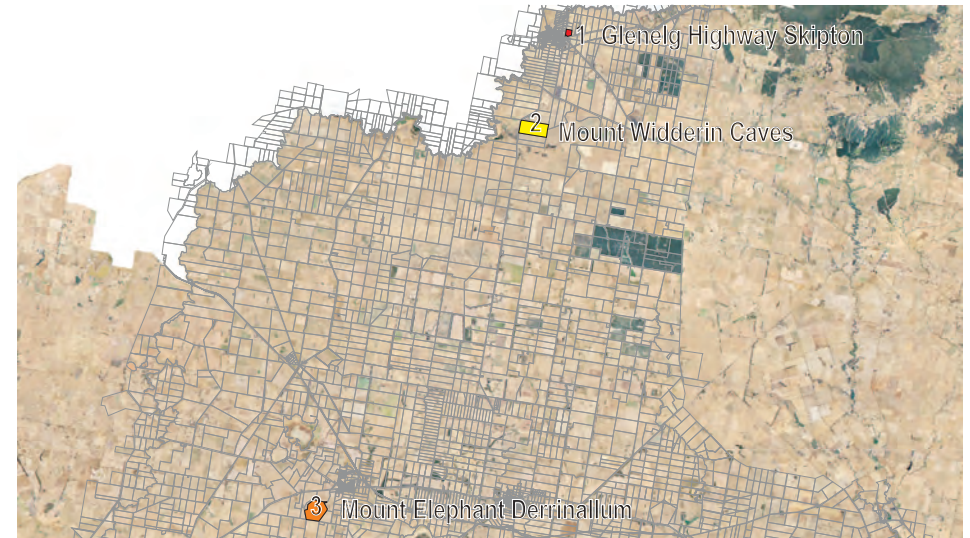
Site Indicator	Precinct and Site Name	Lot Plan	Current Zone	Recommended Zone	Immediate Rezoning	DDO proposed	LPP proposed
10	'Port Campbell West'	268 Great Ocean Road, Port Campbell, Lot 1, TP174312, Parish of Paaratte	Rural Conservation Zone	Special Use Zone	✓	✓	✓
11a	Loch Ard - 'Loch Ard Bed and Breakfast'	Lots 1 and 2, LP114924, Parish of Waarre	Rural Conservation Zone	Rural Activity Zone			✓
11b	Loch Ard -8816 Great Ocean Road, Princetown	Crown Allotment 2 Section A, Parish of Waarre	Rural Conservation Zone	Rural Activity Zone			✓
11c	Loch Ard - 'Booringa Road, Princetown'	Lot 2 PS508387, Parish of Waarre	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
12	'Glenample Homestead'	Lots 17 and 18, TP130811, Parish of La Trobe	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
13a	'Kangarooie, Princetown, Gellibrand Lower'	Lot 1 TP251582, Parish of La Trobe	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
13b	'Kangarooie, Princetown, Gellibrand Lower'	Lot 1 TP231273, Parish of La Trobe	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
13c	'Kangarooie, Princetown, Gellibrand Lower'	Crown Allotment 2B Section A, Parish of La Trobe	Rural Conservation Zone	Rural Conservation Zone			
13d	'Kangarooie, Princetown, Gellibrand Lower'	Crown Allotment 141, Parish of La Trobe	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
13e	'Kangarooie, Princetown, Gellibrand Lower'	Crown Allotment 142, Parish of La Trobe	Rural Conservation Zone	Rural Conservation Zone			
14a	'Princetown East'	Crown Allotment B, Parish of La Trobe	Rural Conservation Zone	Rural Conservation Zone			
14b	'Princetown East'	Crown Allotment A, Parish of La Trobe	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
14c	'Princetown East'	Crown Allotment 18B, Parish of Wangerrip	Rural Conservation Zone	Rural Conservation Zone			
15a	'Moonlight Head West'	Crown Allotment 27 Parish of Wangerrip	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
15b	'Moonlight Head West'	Lot 2, PS500657 Parish of Wangerrip	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
15c	'Moonlight Head West'	Lot 1, PS500657 Parish of Wangerrip	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
15d	'Moonlight Head West'	Crown Allotment 33, Parish of Wangerrip	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
16a	'Moonlight Head East'	'Crown Allotment 34 Parish of Wangerrip	Rural Conservation Zone	Special Use Zone	✓	✓	✓
16b	'Moonlight Head East'	Crown Allotment 35 Parish of Wangerrip	Rural Conservation Zone	Special Use Zone	✓	✓	✓
16c	'Moonlight Head East'	Crown Allotment 39 Parish of Wangerrip	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
16d	'Moonlight Head East'	Crown Allotment 36 Parish of Wangerrip	Rural Conservation Zone	Rural Conservation Zone			
16e	'Moonlight Head East'	Crown Allotment 38 Parish of Wangerrip	Rural Conservation Zone	Rural Activity Zone	✓	✓	✓
16f	'Moonlight Head East'	Lot 1 LP129172 Parish of Wangerrip	Rural Conservation Zone	Rural Conservation Zone			

NORTHERN CORANGAMITE SHIRE - RECOMMENDATIONS

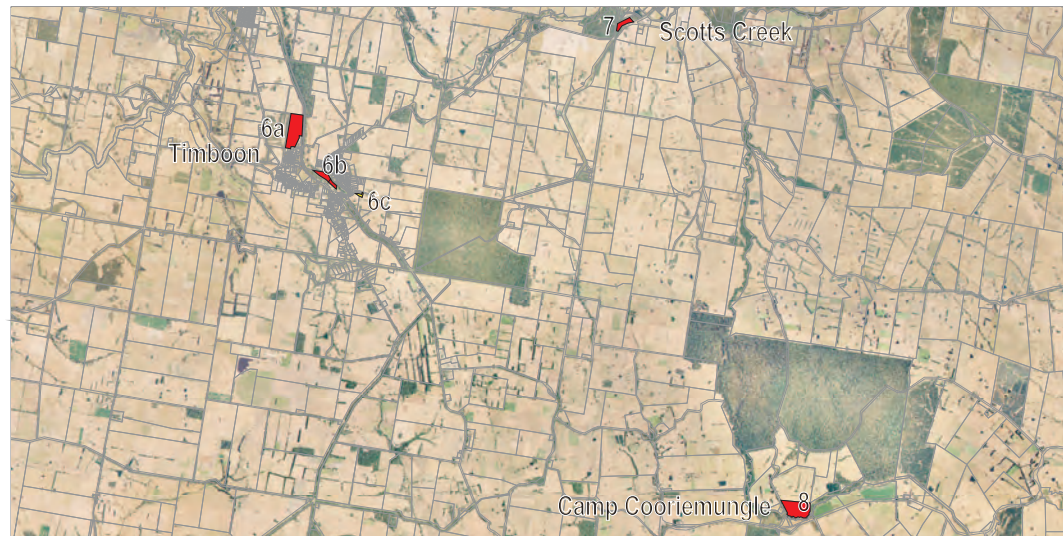
CAMPERDOWN AND SURROUNDS



SKIPTOWN AND DERRINALLUM

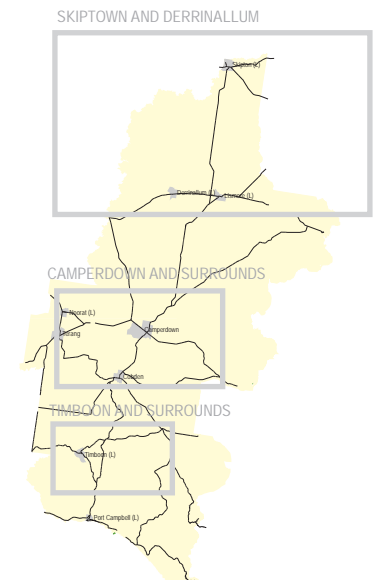


TIMBOON AND SURROUNDS

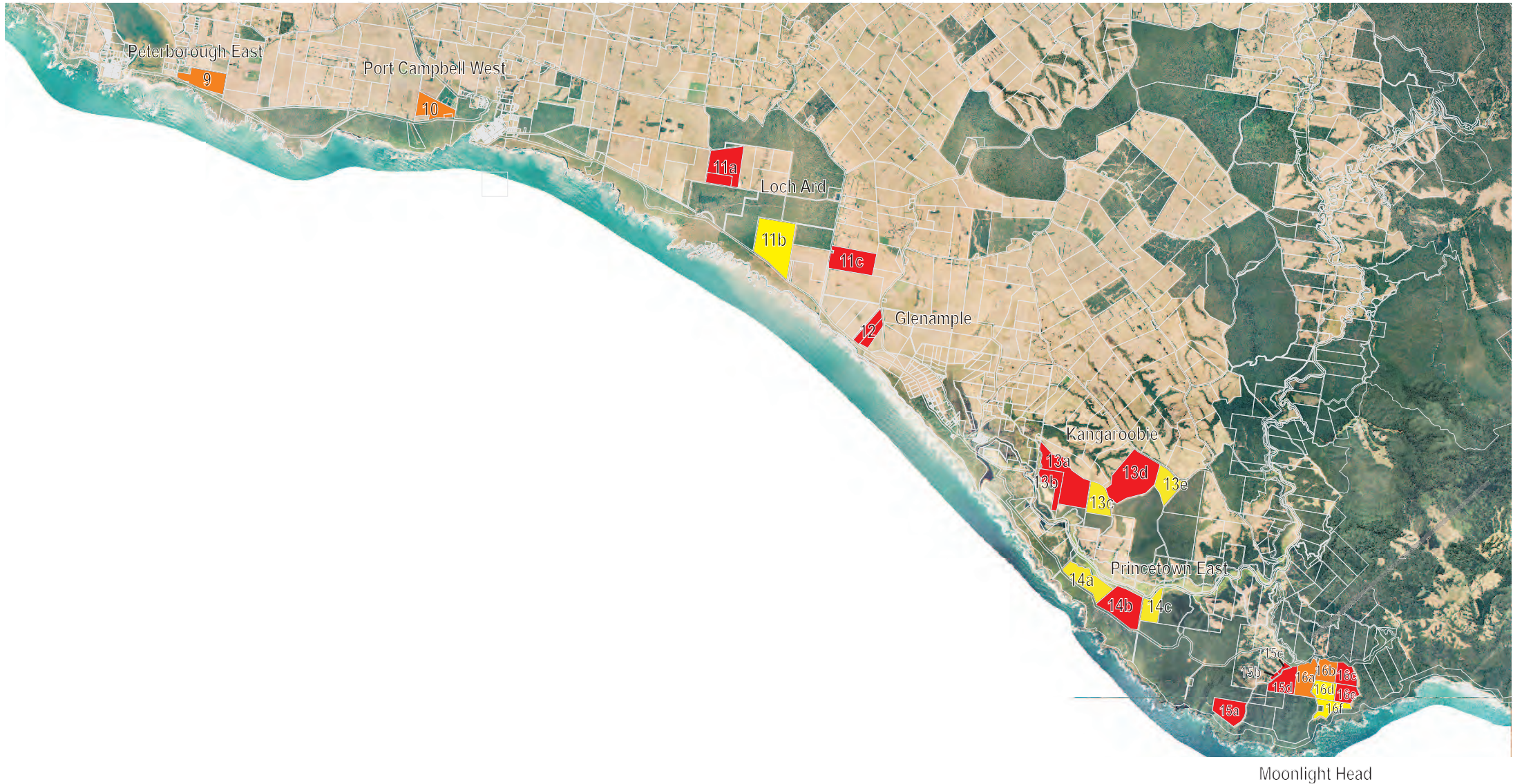


Recommended Zone Changes




- Special Use Zone
- Rural Activity Zone
- No Change



COASTAL SITES - RECOMMENDATIONS



Recommended Zone Changes

-  Special Use Zone
-  Rural Activity Zone
-  No Change