

Hinterland Futures

Issues and Opportunities Report

Prepared for Surf Coast Shire Council

9 October 2017

HiIPDA
CONSULTING

THE STAFFORD GROUP



RMCG

 **SMART**
PLANNING & DESIGN

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1 INTRODUCTION

Project Background

The vision for Surf Coast Shire, as noted in the Municipal Strategic Statement, includes supporting development and growth that positively contributes to tourism and rural businesses and encourages clean industries and development that respects the Surf Coast's environment and lifestyle.

The Shire has undertaken a significant body of strategic planning work over the last decade for its townships such as Torquay and Jan Juc. This has ratified a clear urban growth position, which includes protection of township hinterlands and the rural hinterland at large for rural businesses, complementary tourism activities and for environmental purposes.

The rural hinterland covers approximately 1,020 square kilometres and includes agricultural districts (the hills and plains), small farming towns including Winchelsea as the main rural service centre, through to the Great Otway National Park.

The hinterland has traditionally performed a strong agricultural role in dairy, beef, sheep and grain. Structural changes within the primary industry sector have seen many of the traditional large farm operations replaced by smaller agribusiness activities, including tourism, a diversity of other business types and hobby farms. Some large farm operations remain.

The area is also influenced by tourism activity generated by the Great Ocean Road and Great Otway National Park. The millions of tourists that visit the region each year provide businesses in the rural hinterland with significant opportunity. A range of other opportunities also exist. This includes the potential to harness treated water that is currently discharged into the sea.

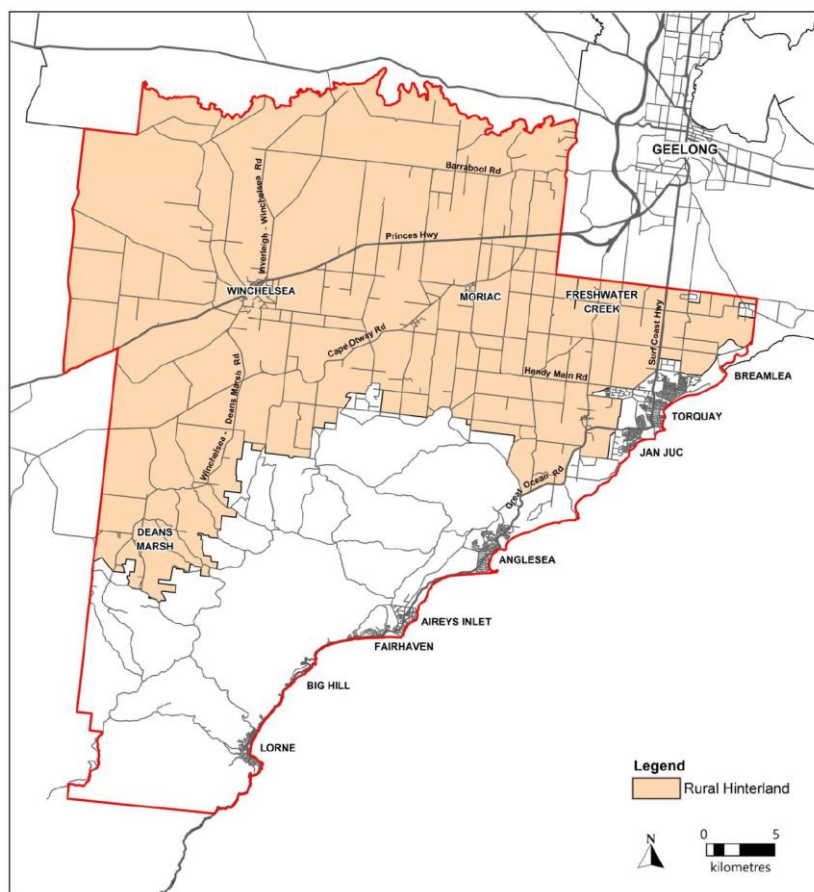
The hinterland is an important generator of economic activity and employment. Whilst the population of Surf Coast's major towns is expected to continue to grow strongly in the future, the related jobs and services that are required to support a balanced local economy are expected to be provided in both urban and rural settings.

The Planning Scheme framework has changed over time and has enabled a diverse mix of outcomes to occur in the rural hinterland. There is a risk that land use and development could occur in an ad

hoc way and compromise the hinterland’s capacity to function as intended.

For these reasons, greater clarity on the future direction of the rural hinterland is required.

Figure 1 - Hinterland Study Area



Source: Surf Coast Shire Council, 2017

This report has been prepared to identify the economic, social and environmental issues and opportunities present within and impacting on the rural hinterland with a view to clarify future strategic directions that will support and facilitate appropriate rural businesses, tourism and associated job growth.

Project Purpose

The purpose of the Hinterland Futures Strategy is to:

- Provide an evidence-based and strategically justified spatial economic strategy for the study area; and

- Provide an associated implementation plan, addressing Planning Scheme, economic development and infrastructure actions.

This Report

This report provides an interim output in the development of the Hinterland Futures Strategy. This report is an **Issues and Opportunities Report**.

This report synthesises key opportunities, issues and questions that relate to the hinterland study area's potential future development. This information will be tested, refined and detailed via a consultation process with stakeholders and the community before a draft strategy is prepared for the hinterland. This report is not a strategy.

Project Scope

The focus of this report is to examine matters relating to land use, development and economic activity in the study area.

The project scope excludes the following topics from consideration:

- Township structure plans and urban growth boundaries;
- Land capability and soil assessment beyond existing available information;
- Carbon farming assessment and strategy;
- Coal seam gas and fracking assessment and strategy;
- Windfarm assessment and strategy;
- Crown Land assessment;
- Event policy;
- Development incentives;
- Planning Scheme Amendment process; and
- Other matters not listed in Report Structure below.

Report Structure

This report is structured in three sections as follows:

- Hinterland Context;
- Issues and Opportunities; and
- Summary and Next Steps.

2 HINTERLAND CONTEXT

Introduction

The information in this section of the report provides an overview of selected contextual findings of the Background Research Report. This information is provided to set the scene for the issues and opportunities.

Current Policy Directions

Surf Coast Shire’s local planning policy supports development and growth that positively contributes to tourism and rural businesses in circumstances where such activity respects Surf Coast’s environment and lifestyle.

The key directions in local policy are to:

- Direct anticipated high population growth into existing townships, primarily Torquay-Jan Juc and Winchelsea and protect the rural landscape from urban intrusion;
- Maintain a clear rural-landscape separation between settlements and particularly between Torquay-Jan Juc and the Armstrong Creek southern growth corridor of Geelong;
- Protect and enhance the rural areas of the Shire for their diverse agricultural, environmental and landscape values and opportunities;
- Support agriculture and rural industries that build the economic base of the Surf Coast Shire;
- Recognise that rural landscape vistas are highly valued for their contribution to the amenity and liveability of rural areas; and
- Encourage tourism based uses that link to the natural and rural setting without compromising these values.

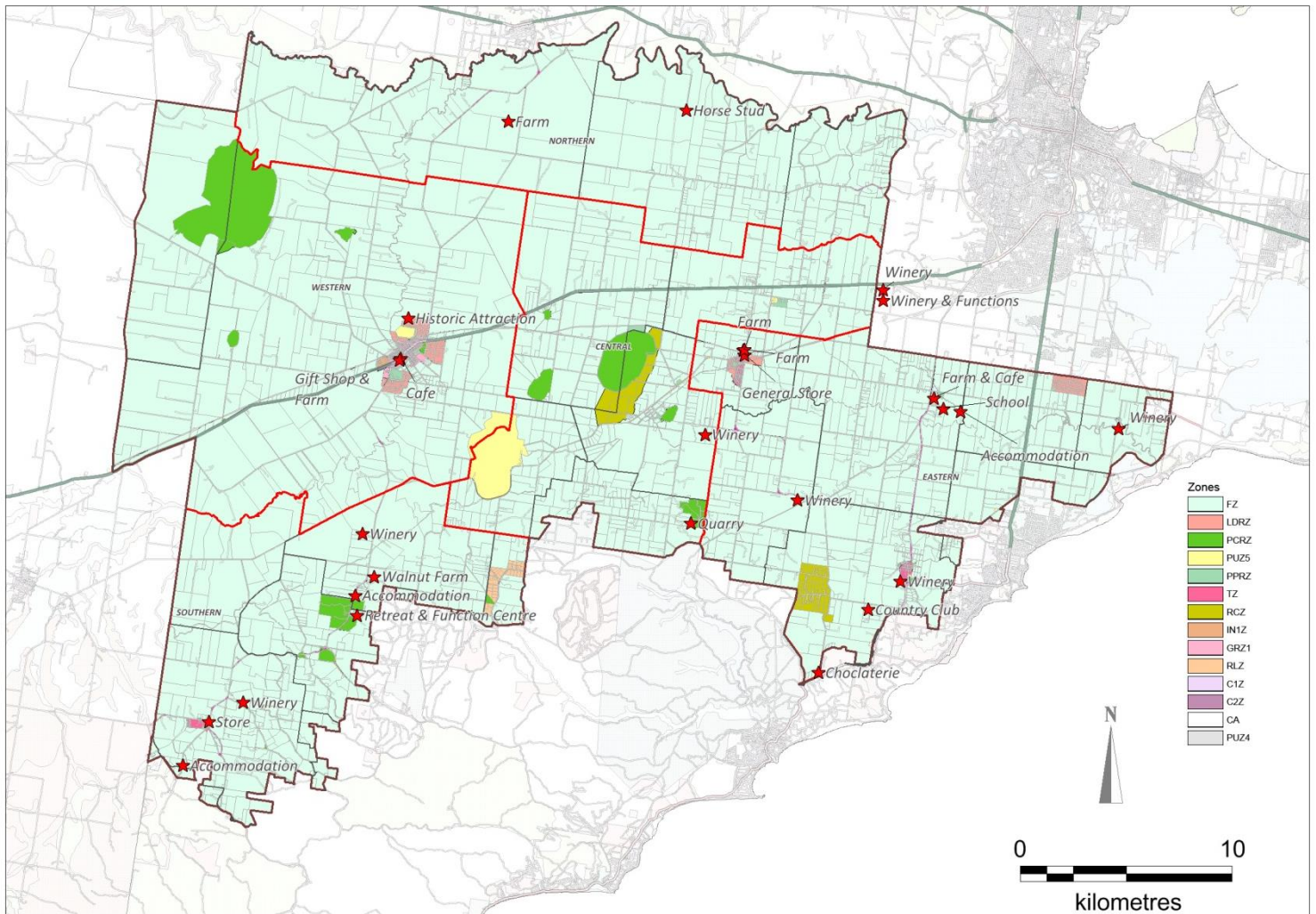
Zones and Land Uses

The Farming Zone (FZ) is the primary zone in the hinterland area (covering approximately 94% of the area). The Public Conservation and Resource Zone (PCRZ), Rural Conservation Zone (RCZ), Low Density Residential Zone (LDRZ) and Rural Living Zone (RLZ) are also notable in the area, along with zones to accommodate infrastructure assets.

The current land use zoning framework is shown in the following figure. A selection of organisations that operate in the hinterland is also shown in the figure.

The types of uses and businesses using the area are diverse and include farms, tourism operations, institutions, commercial uses and residential uses.

Figure 2 - Zones and Selected Land Uses



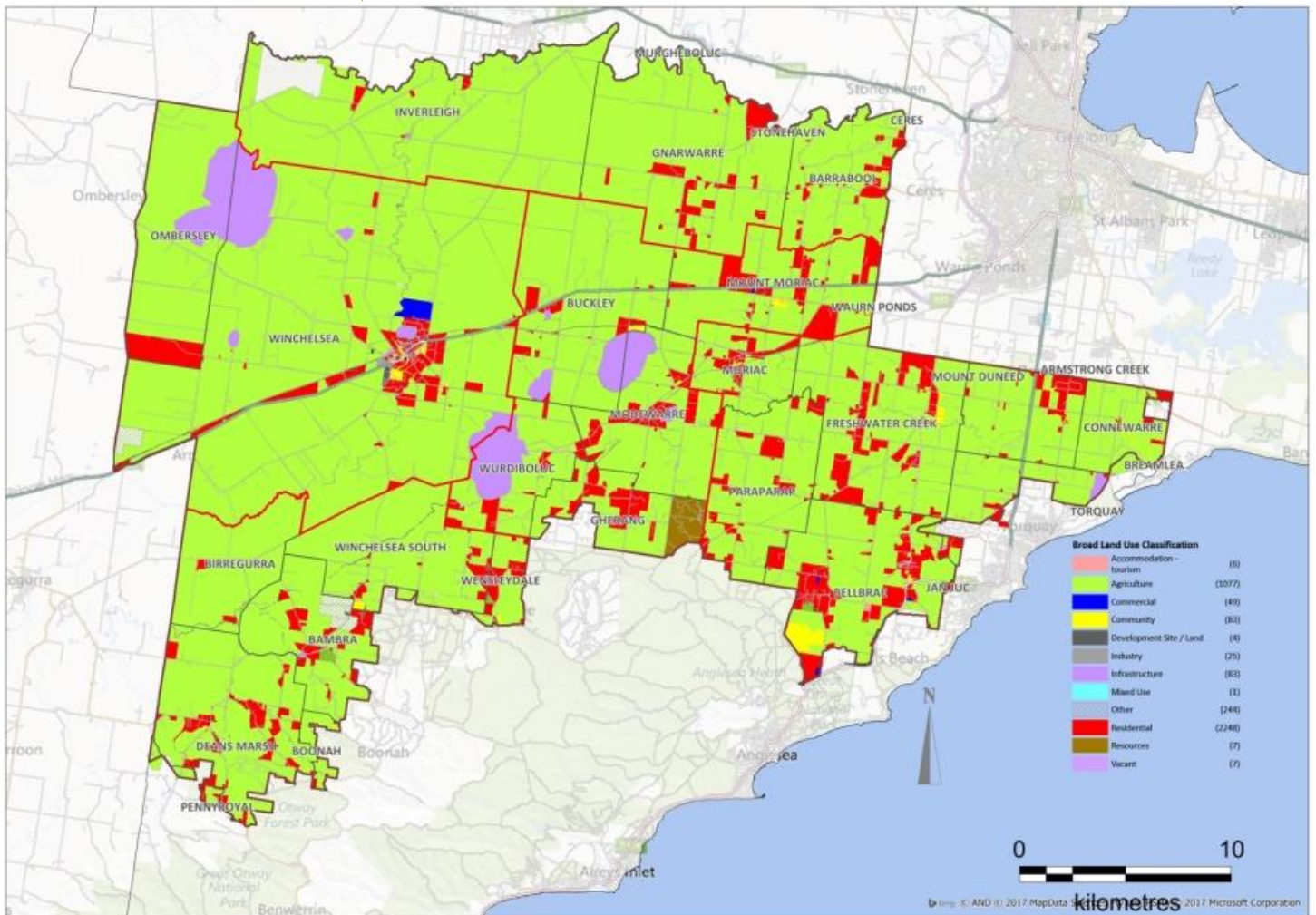
Investment data shows food and tourism based investment has occurred in the hinterland in recent years. Notable examples include construction of a chocolate factory in Bellbrae and a planned Adventure Park in Bellbrae.

Table 1 - Zones in the Hinterland Study Area

Zone	Area HA	Share
Farming Zone (FZ)	95,157.45	93.9%
Public Conservation and Resource Zone (PCRZ)	2,725.05	2.7%
Public Use Zone (PUZ6)	993.32	1.0%
Rural Conservation Zone (RCZ)	743.88	0.7%
Road Zone (RDZ2)	628.08	0.6%
Low Density Residential Zone (LDRZ)	444.30	0.4%
Rural Living Zone (RLZ)	164.40	0.2%
Other Zones	468.76	0.5%
Total HA	101,325.24	100.0%

The figure below shows broad land use patterns in the hinterland area.

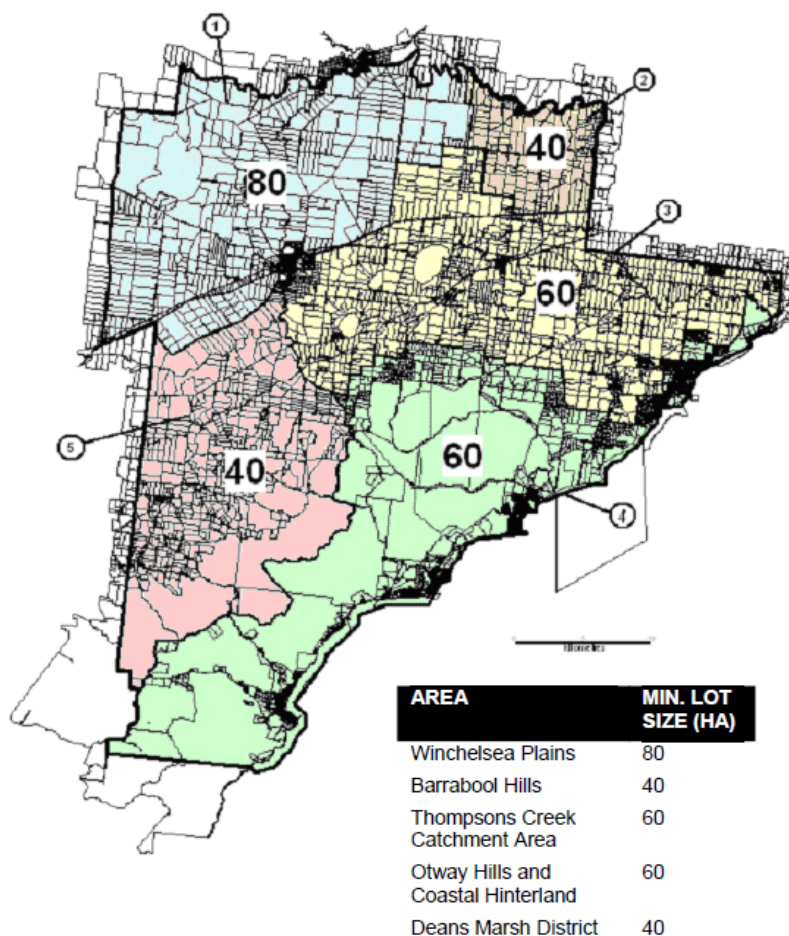
Figure 3 - Broad Land Use Distribution



Lot Sizes

A key attribute of the hinterland is the rural landscape. This is in part maintained by minimum lot size controls that apply for the dominant Farming Zone (FZ) in the area. The minimum lot size varies from 40 hectares (ha), 60 ha and 80 ha depending on the Farming Zone district in the Shire.

Figure 4 - Schedule to the Farming Zone (Minimum Lot Size)



Source: Surf Coast Shire Planning Scheme

The hinterland’s lot size and land use patterns are diverse but generally described as having a north-west to south-east split. Larger lots are common to the north-west portion of the hinterland, while smaller lots are concentrated to the south-east along with concentrations around towns such as Winchelsea, Deans Marsh, Wensleydale, Gherang, Bellbrae, Jan Juc, Moriac and Mount Moriac.

Figure 5 - Lot Size Distribution

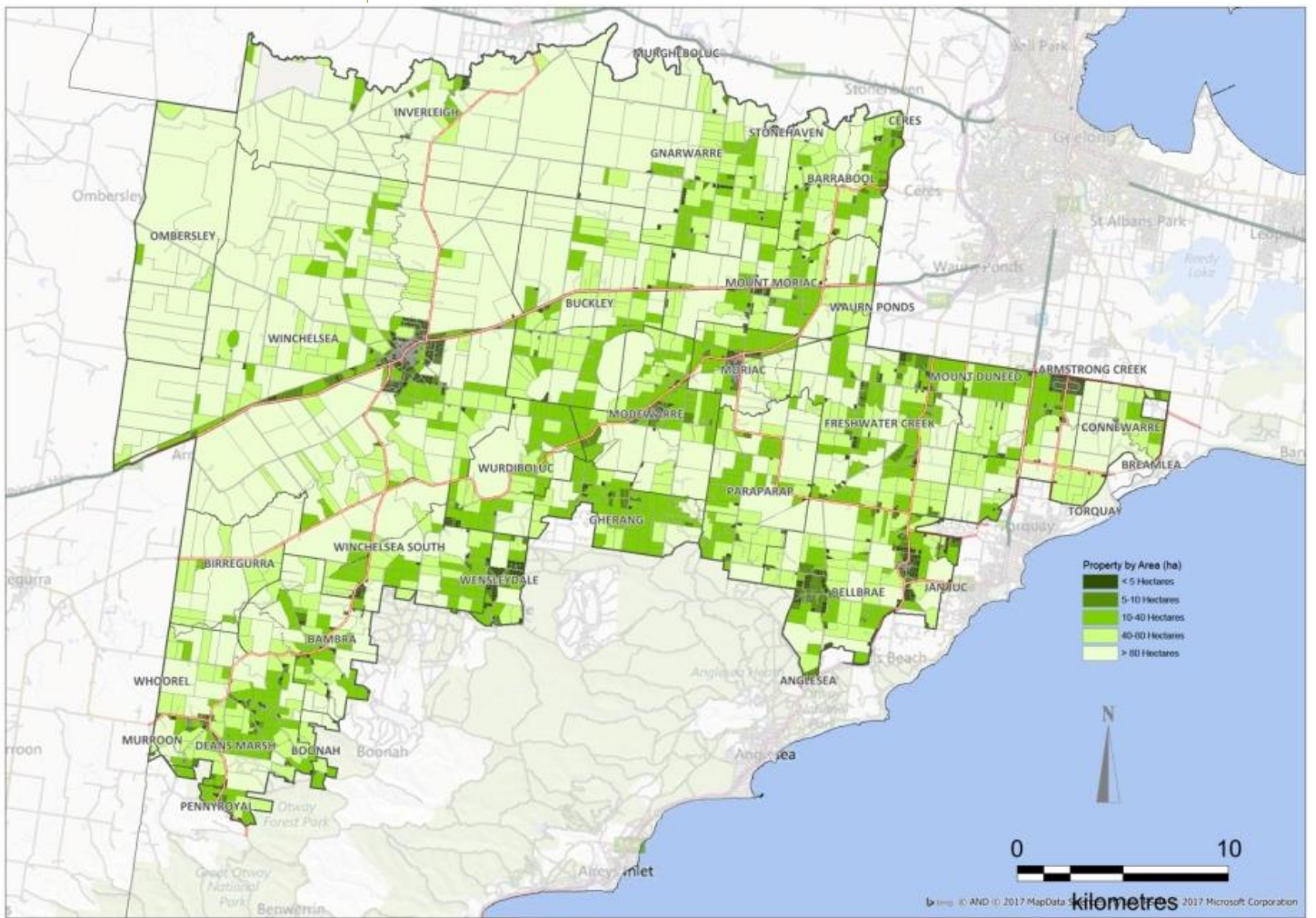
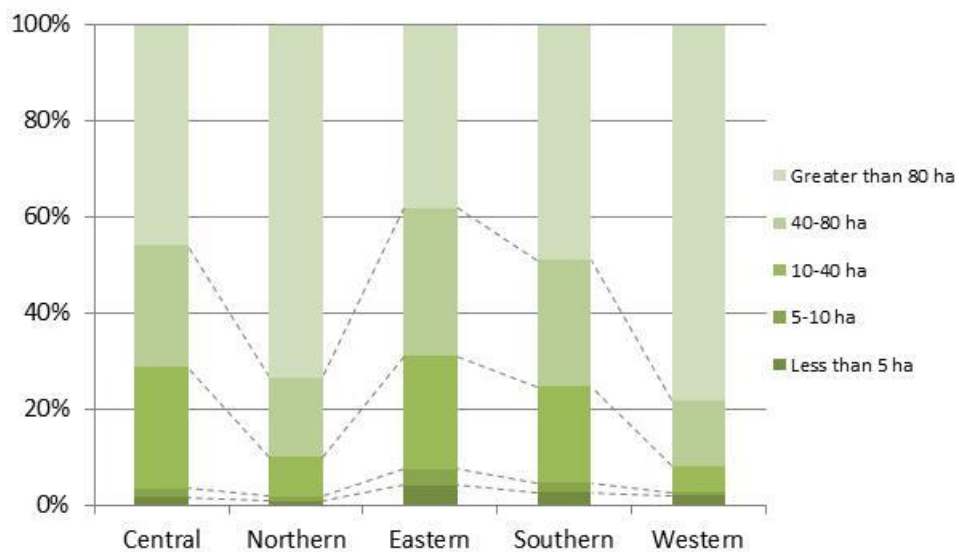


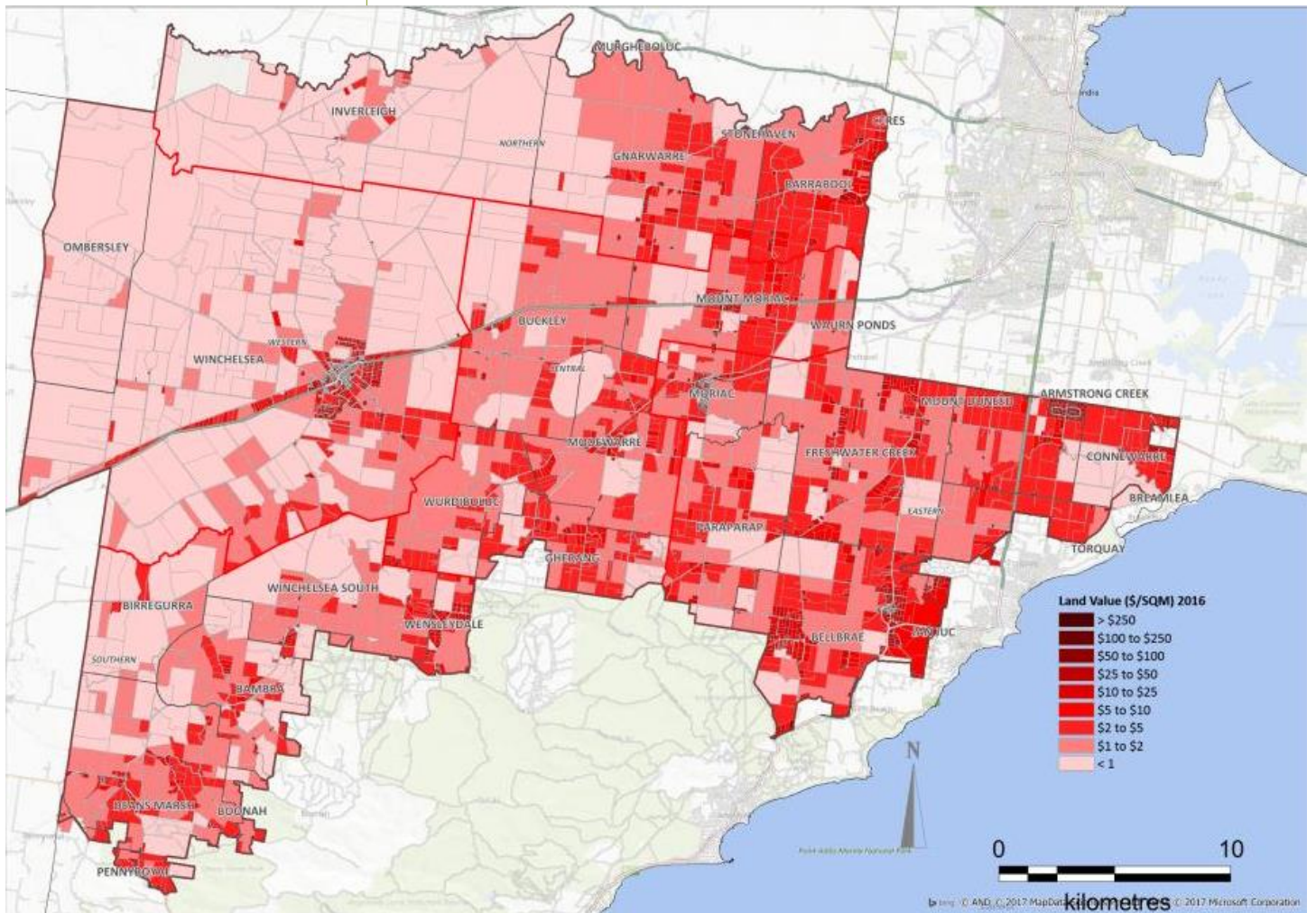
Figure 6 - Lot Areas by Sub-Region



Land values across the hinterland follow a pattern similar to lot size. Values increase towards the eastern portions of the area towards Geelong and to the southern areas close to Torquay and Lorne. Land values in the northern part of the region around Winchelsea tend to be lower (on a unit area basis) and reflect large farming lots.

A price premium is associated with rural lifestyle properties in Surf Coast Shire and the hinterland, which currently achieve prices approximately double the regional Victorian median.

Figure 7 - Land Values (\$/sqm), 2016



Agricultural Land

Mixed farming and grazing are the dominant forms of agricultural land use in the hinterland, accounting for 86% of agricultural lots by number, and 77% by land area. When livestock production (both sheep and cattle are included as well as the equine industry) the proportion of lots and land consumed rises to 95% and 93% respectively.

A conceptual picture of the agricultural landscape in the G21 Region is shown below, followed by a map of agricultural land use patterns.

Figure 8 - A Conceptual Picture of the Agricultural Landscape in the G21 Region

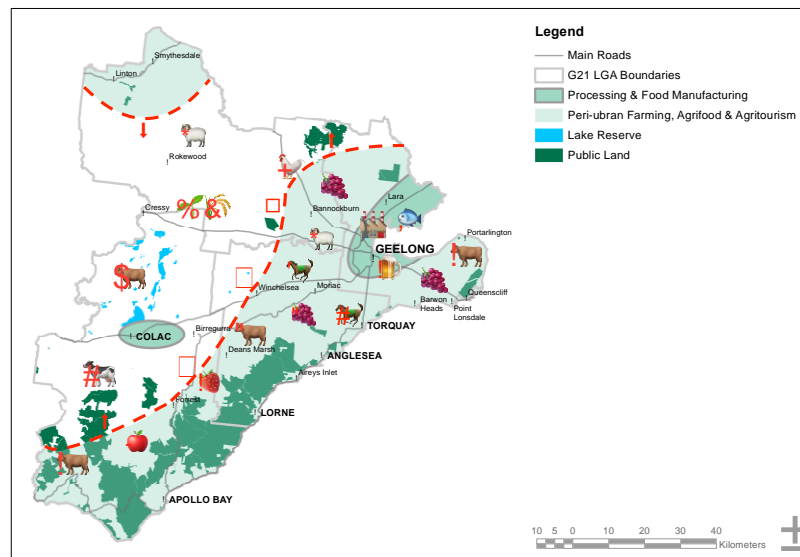
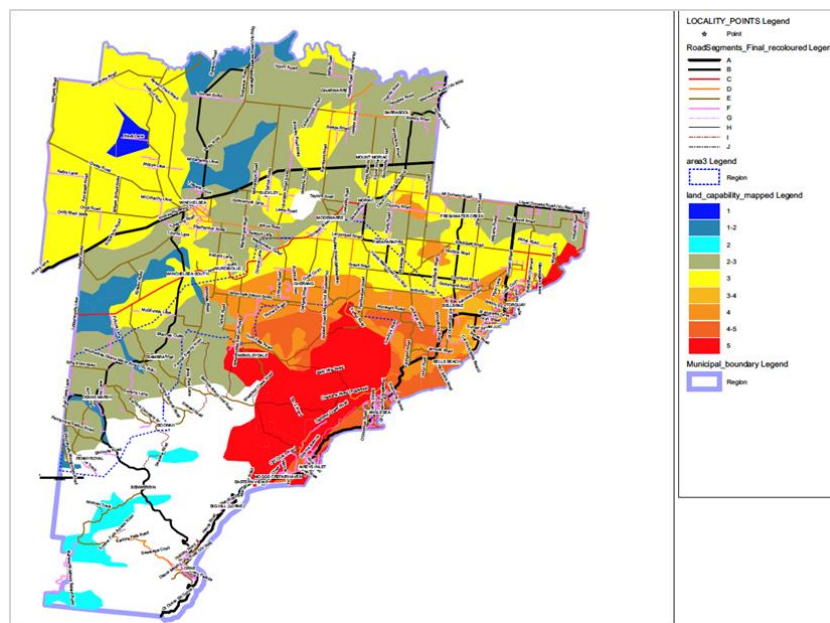


Figure 10 - Agricultural Quality of the Surf Coast Shire



Source: Surf Coast Shire (2007) Rural Strategy Review. Report prepared by RMCG for Surf Coast Shire, Torquay, Victoria

Population and Jobs

Surf Coast Shire has a relatively modest local job stock compared to the size of its population and labour force, with a job to labour force ratio of 55%. The same ratio for the hinterland (best-fit data area) is estimated to be around 31%.

Table 2 – Population, Labour Force and Jobs, 2011

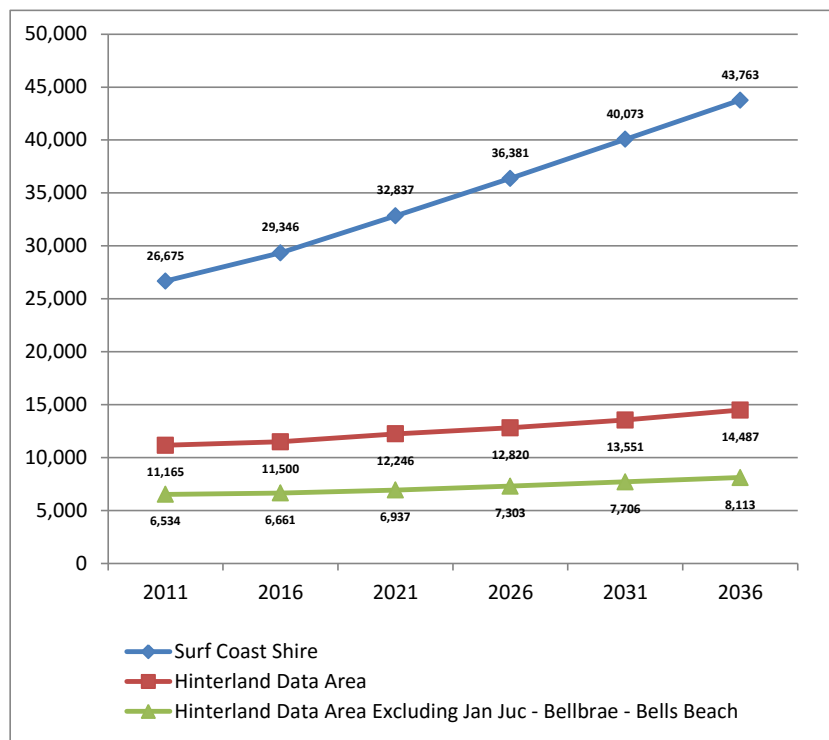
Indicator	Hinterland Data Area*	Surf Coast Shire
Population	11,165	26,675
Labour Force	5,693	12,989
Participation Rate	51.00%	48.70%
Jobs in Location	1,762	7,155
Jobs / Population	15.8%	26.8%
Jobs / Labour Force	31.0%	55.1%

* Includes data outside the Hinterland Study Area such as fringe areas of Torquay and Jan Juc; about 59% of the population in the Hinterland Data Area is within the Jan Juc-Bellbrae-Bells Beach area

Source: ABS Census 2011, REMPLAN December 2016

Population trends and projections for selected areas are shown below.

Figure 11 – Selected Areas: Population Trends and Projects, 2011-2036



Source: Forecast ID 2017

Expected future population growth will mean that approximately 180 additional jobs per annum will be needed in the Shire to maintain the Shire’s job to labour force ratio to 2036.

Most future jobs are expected to be accommodated in towns however the hinterland has a significant role to play in delivering jobs, both directly and indirectly through multiplies in the economy, including via inter-relationships between agriculture, manufacturing (such as food and beverage processing), tourism (such as food and farm based tourism) and construction. Many of these jobs would be town based but supported by the hinterland.

Agribusiness

Businesses that operate within the hinterland’s farming areas include small agrifood businesses. Some of these have farm gate sales and some are in the three food trails in the region (Otway Harvest Trail (61 businesses), Bellarine Taste Trail (41) and Moorabool Valley Taste Trail (25)). Businesses with farm gate sales are a combination of agribusiness and tourism, as they thrive off the visitor economy and its demand for a local food and wine experience.

Some small businesses do not have farm gate sales, but do have supply chain linkages across the region and beyond.

Intensive animal industries are also located in the area. This includes the chicken meat, egg, pork and goat dairy industry sectors. The area has an existing supply of labour for this sector and has access to land and infrastructure. However, recent developments in the industry include increases in compliance costs in Victoria and investment inter-state which could result in the region missing out on new investment.

Lifestyle Farms

The attractiveness of the region as a lifestyle destination has driven growth in hobby or lifestyle farms. Lifestyle farms are differentiated from small agrifood businesses based on the intended primary purpose of the land as a place of residence as opposed to a place of business. Lifestyle lots influence land value and therefore viable agribusiness locations.

Tourism

Other than natural assets, such as walking trails and sightseeing, and an emerging cluster of food trail operations, there are a limited number of ‘attractors’ and tourism products across the hinterland.

There is also a limited number of supporting accommodation facilities, which constrains the number of high-yielding overnight visitors.

Despite this, visitation to the Surf Coast is strong and has been increasing over time, particularly for domestic day trip visitors visiting the coast, Great Ocean Road and Great Otway National Park. As such, opportunities exist to capture tourists and direct them to the hinterland area.

Road Infrastructure

A road network (primary mode of transport) and walking / cycling trails are available in the area. However, the transport infrastructure is not of a sufficient quality to accommodate high volumes of traffic, especially along Lorne Deans Marsh Road, which is experiencing higher demand as a key connection with the Great Ocean Road.

Other such roads require identification and could include Hendymain Road, Cape Otway Road and Mount Duneed Road.

Moreover, many of the unsealed roads in the hinterland are unsuited to tourist traffic. The Pennyroyal Valley has a cluster of tourism related businesses on unsealed roads and access is problematic.

Cycling both on and off-road is also problematic throughout the area.

Recycled Water

Recycled water has long been identified as an untapped resource within the region. The Black Rock Water Treatment Plant pumps treated Class C water into the ocean. Some of this has been used for irrigated agriculture in the Torquay North area.

The recently released Geelong Economic Futures Report identified the opportunity for a project based on securing high-value farming and food services through delivering low-cost and reliable water supplies, including from recycled water.

Information Technology

NBN provision will cover the majority of the hinterland area. Winchelsea is covered (as at September 2017) by fixed line NBN with fixed wireless build commenced in in the hinterland towns of Deans Marsh and Moriac. The build has not yet commenced to cover Bellbrae.

Limited internet access has been identified as a significant constraint on businesses in the hinterland. Poor connectivity limits the efficiency of businesses to operate – by limiting file transfers, access to information, communication with customers and suppliers.

Other Information

Refer to the Background Research Report for more information about the hinterland study area.

3 ISSUES AND OPPORTUNITIES

Introduction

This section identifies a list of opportunities that could be taken in the hinterland area or issues that could be addressed or managed for the benefit of the area. The ideas are preliminary at this stage and, if accepted, would be detailed further in the strategy development process.

A prompt is provided in the left margin regarding your view of the topic regarding whether you agree, disagree or would like to offer details or suggested changes.

The topics are listed in no particular order.

1. Prioritising Rural Landscape and Environmental Quality

An overarching opportunity is to establish a land use and development strategy that prioritises the quality of the rural landscape and natural environment. This recognises that the rural landscape and natural environment quality is a primary contributor to amenity, liveability and investment in agricultural and tourism sectors.

The opportunity includes reinforcing existing policy to:

- Increase habitat connectivity across the landscape;
- Support sustainable farming enterprises;
- Improve waterway health through the protection of riparian and in-stream habitat on private land;
- Manage bushfire risk;
- Protect and enhance the landscape character, amenity and liveability that continues to attract residents and visitors;
- Maintain a clear rural-landscape separation between settlements; and
- Support nature-based commercial ventures;

2. Exploring Potential of Recycled Water

The protection of water assets in the region is central to supporting biodiversity, agriculture and communities. Opportunities to secure alternative sources of water, such as recycled water, will help alleviate the pressure on catchments and support sustainable growth and production in the hinterland.

Do You ...	
Agree?	
Disagree?	
Suggest Details or Changes?	

Do You ...	
Agree?	
Disagree?	
Suggest Details or Changes?	

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Opportunities include accessing recycled water from Winchelsea and Black Rock to support agriculture and commercial ventures.

Businesses in the hinterland area have an opportunity to access recycled water subject to the supply being feasible. Feasibility is enhanced where a cluster of users demand such services.

The types of business and locations that can take advantage of this opportunity remains to be specifically identified. This could include businesses engaged in high value food production such as hydroponics, aquaponics, aquaculture and suitable processing activities.

3. Managing Climate Change Risk

Climate change will create risks for primary production, infrastructure and the environment of the rural hinterland. It is important that future planning responds to the climate change projections and takes steps to support adaptation across all sectors. Climate change may also present opportunities, such as new agricultural enterprises suited to the climate and a more reliable rainfall pattern compared to other regions.

There is an opportunity to partner with Deakin University to undertake research to identify the impacts of climate change on crop viability for the region

Other opportunities exist for exploring potential renewable energy production, such as wind and solar power.

4. Clustering Agricultural and Tourism Activities in Precincts

An opportunity exists to establish policy directions and associated planning controls and infrastructure investment decisions to support and facilitate the clustering of selected agricultural and tourism activities within precincts of the hinterland.

An indicative concept plan is shown below highlighting general areas of high agricultural quality with large lots and small lot areas identified, environmentally sensitive areas and areas with high tourism visibility.

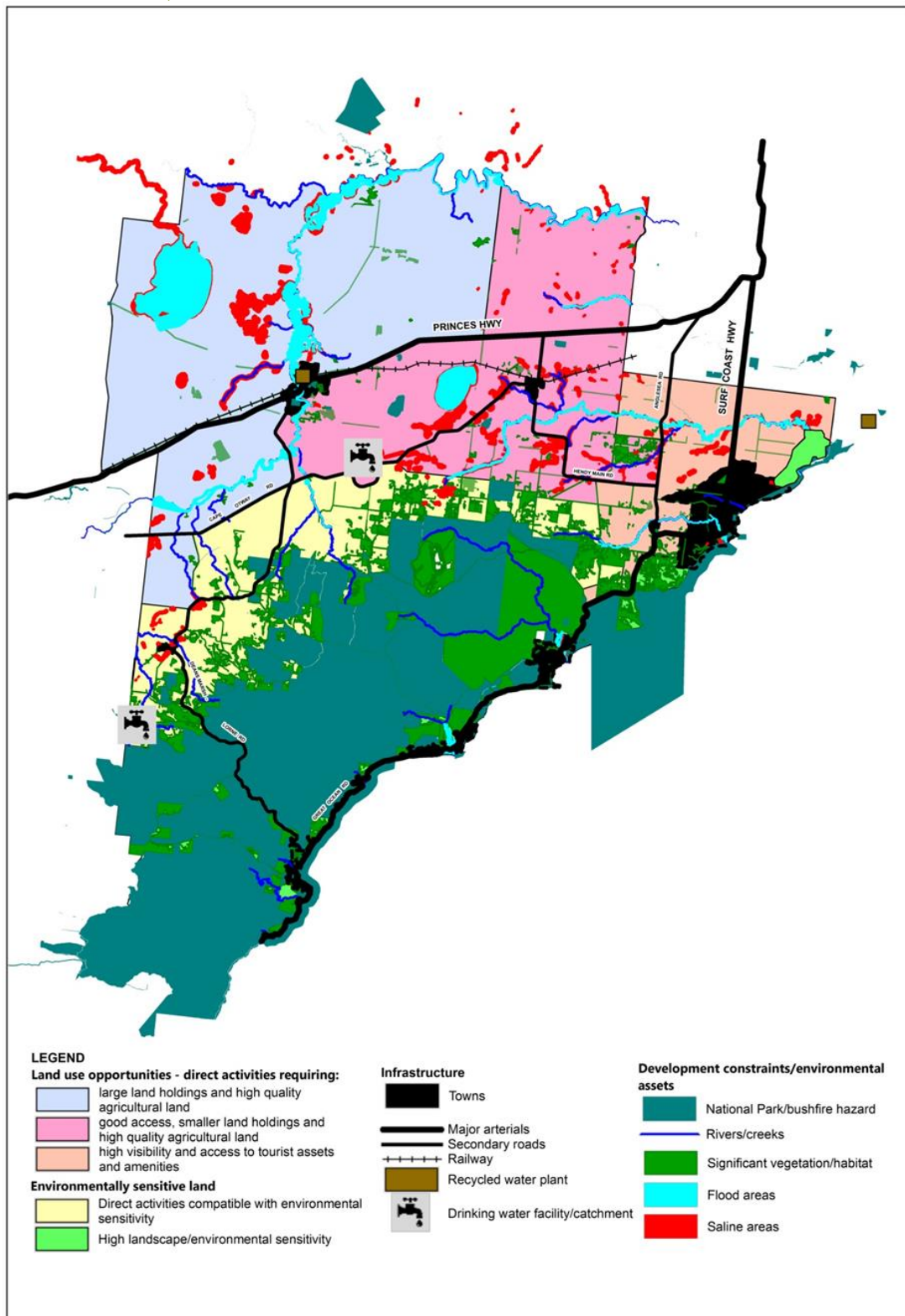
There is potential for highly visible tourism assets and amenities to run along the south side of Cape Otway Road for example.

This plan, or a modified version of it, can be used to guide a land use strategy for the area.

Do You ...	
Agree?	
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Do You ...	
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Suggest Details or Changes?	

Figure 12 – Preliminary Precinct Plan for Discussion



Source: Surf Coast Shire

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Disagree?	<input type="checkbox"/>
Suggest Details or Changes?	<input type="checkbox"/>

5. Facilitating Small Agrifood Businesses

The opportunity exists to continue ongoing investment and jobs growth in a diverse range of agrifood activities in the hinterland area.

This is a key opportunity for the hinterland. Businesses that have farm gate sales also build the tourism sector and local food and wine experience.

The issues small agrifood businesses often face relate to business development and marketing, including how to effectively work together to maximise opportunities for all and how to better leverage the visitor economy.

6. Facilitating Intensive Animal Industries in the North-West

Intensive animal industries present an opportunity for continued investment and job creation in the region. However, such activity can be in conflict with small agrifood businesses, tourism and hobby farms and as such the location of any new intensive animal industries could be focused in the north-west sector of the hinterland.

The protection of areas that can support more intensive agricultural development is central to ensuring that sustainable and productive agriculture can continue in the hinterland.

7. Facilitating Hobby Farms on Unproductive Farmland

The hinterland area has areas of relatively unproductive farmland, with low quality soli attributes. There are opportunities to support the transition of such land to lifestyle farms or productive small farms.

The delineation between lifestyle farms and small agrifood businesses can be blurred, as often small agrifood businesses start out as a lifestyle farm.

8. Facilitating Food Tourism

The introduction and early success of the Chocolaterie & Ice Creamery near Bellbrae demonstrates that food destinations could thrive in the region.

In particular, attracting established food destination brands and working in collaboration with other destinations can lead to the further development of a regional food hub. Ideally, this food hub would work in conjunction with the local surroundings, improve the

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Suggest Details or Changes?	<input type="checkbox"/>

interpretation of the area and provide an improved sense of place for the hinterland. This could build on the existing food trails in the region.

9. Facilitating Arts & Crafts and Cultural Trail Tourism

The Winchelsea area is a cultural and heritage focal point of the hinterland. This is demonstrated by a number of cultural and heritage events and activities held across the town as well as indigenous history. Winchelsea offers a peaceful country environment that includes a collection of elegant establishments.

From this, Winchelsea could be a focal point of an **Artisan Trail** that incorporates the local arts & crafts scene and provides a cultural offering for visitors. Visitors could be guided through exhibition spaces and galleries throughout the area, as well as local markets, which would provide insights into local culture and be tied into the surrounding environment of the hinterland.

This could have the added benefit of growing the arts scene and attracting local and regional artists to the area.

10. Facilitating High Quality Accommodation Facilities

To attract higher yielding overnight visitors, high quality accommodation is needed. The quality needs to be exceptional to offer a point of difference in the market and for the facilities to become destinations in their own right.

The hinterland could avoid adding generic accommodation capacity and focus only on quality destination accommodation.

11. Destination Making

An opportunity exists to build on the strengths of the hinterland and its towns as ‘destinations’, based on the provision of a specific product or service to attract visitors. For example, Deans Marsh could be promoted as a focal point for the hinterland. The key is to offer a suitable product that attracts visitors. This could involve a range of experiences and activities, each offering a different interpretation of the area and town, including linkages with the Otway Harvest Trail or a purpose-built attraction that focuses on the connections with nature and the local environment.

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Do You ...	
Agree?	
Disagree?	
Suggest Details or Changes?	

12. Developing Tourism Product Clusters

Tourism product clusters could potentially complement each other so that visitors would be able to experience all three – food, arts, destinations - during their trip (either a day trip or overnight). As a result, visitors would be directed to the main areas of the hinterland, which would increase visitation, improve their knowledge and engagement with the area and help stimulate the visitor economy.

The product clusters should align with the Destination Action Plan being developed for Winchelsea.

13. Facilitating Business Innovation and Jobs Growth

There is an opportunity to generate investment and jobs growth via innovation within existing business. This could be promoted to address challenges relating to business operations and sustainable energy and water initiatives.

Partnerships could be further developed between landowners and Deakin University and other organisations like Barwon Water.

14. Managing Land Use Conflicts

The interaction of larger commercial farms with lifestyle farms, agrifood businesses and tourism operations can sometimes be problematic. People who locate in the hinterland may not be fully aware or understand the needs of large commercial farmers and vice versa. Land use conflict can occur around such things as:

- The management of pest plants and animals;
- Farm practices, which may lead to increased noise, such as calf weaning, tractor operations, scare guns in orchards or vineyards;
- The application of chemicals and fertilisers to crops and pastures, or the burning of stubbles; and
- The use of rural roads to move livestock, farm machinery and farm freight.

Whilst the focus in managing land use conflicts is often placed on the practices of the commercial farms, the land and animal management practices of lifestyle farmers can also be a concern and a threat to pre-existing businesses.

Farm practices can also be a threat to the visitor economy. Visitors to the region who are seeking a local food and wine experience also seek a high amenity natural and rural landscape experience.

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Suggest Details or Changes?	

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Do You ...	
Agree?	
Disagree?	
Suggest Details or Changes?	

15. Improving the Road Infrastructure Network

The road infrastructure network is not of sufficient standard to support a full range of activities in the hinterland. This includes issues related to standard of road construction and conflicts between agricultural vehicles and tourists. Tourism businesses increase demand on rural roads that may have not been designed for high traffic volumes.

The opportunities include defining routes and developing a road hierarchy and development plan that support:

- Agricultural activities and heavy vehicle routes;
- Tourism activities including food & wine trails and artisan trails; and
- Cycling (on and off road) and walking.

16. Improving the Information Technology Network

As noted earlier, limited internet access has been identified as a significant constraint for businesses in the hinterland. The NBN serves some of the area.

There is an opportunity to explore ways of improving information technology networks in the area with relevant providers. The focus of this could be based on a precinct development plan that identifies intended future clusters of activity across the area.

17. Clarifying Uses in the Rural Conservation and Farming Zones

There is currently a gap in the Surf Coast Planning Scheme to guide decision making for discretionary uses in the Rural Conservation and Farming Zones. There is competing policy in relation to the protection of environmental and landscape values and the promotion of tourism facilities and the economic development it brings.

Many Rural Conservation Zones are located on the fringe of towns and generally have a low agricultural value. In many cases such areas were zoned to preserve a significant viewline.

The role of tourism in the Farming Zone needs clarification. This could include guidelines to support tourism of particular types in precincts of the hinterland. Moreover, decoupling tourism from needing an agricultural use could be explored.

Tourism uses are diverse and can include leisure and recreation, outdoor recreation, food and drink processing and accommodation.

The discretionary uses that present opportunity in these zones need to be identified and tested based on the directions of the strategy development process. Guidelines that might be considered include:

- Location within a defined tourism precinct;
- Impact on image and landscape and environmental values;
- Complementarity to farming practices; and
- Access to arterial route / tourism route.

18. Refining Planning Policies

In addition to the above, there is an opportunity to refine Surf Coast Shire’s Local Planning Policy Framework to align with the outcomes of the final strategy (when available), addressing Agriculture Policy, Rural Landscape Policy, Environmental Values Policy, Tourism Policy, Bushfire Management Policy, Infrastructure Policy and Economic Development Policy.

Consideration could also be given to preparation of Localised Planning Statements. These provide a basis for more detailed investigation of Planning Scheme tools and implementation mechanisms to support appropriate controls, change and development. There is an opportunity to investigate and advocate to State Government for a Localised Planning Statement to be developed for the Surf Coast hinterland to recognise the key agricultural, food security, environmental, landscape and tourism values the locality offers to the State.

Do You ...	
Agree?	
Disagree?	
Suggest Details or Changes?	

Other Directions

Other directions for the study area can be nominated in addition to the above.

4 SUMMARY AND NEXT STEPS

Summary

A summary of potential strategy directions identified to date follows:

1. Prioritising Rural Landscape and Environmental Quality
2. Exploring Potential of Recycled Water
3. Managing Climate Change Risk
4. Clustering Agricultural and Tourism Activities in Precincts
5. Facilitating Small Agrifood Businesses
6. Facilitating Intensive Animal Industries in the North-West
7. Facilitating Hobby Farms on Unproductive Farmland
8. Facilitating Food Tourism
9. Facilitating Arts & Crafts and Cultural Trail Tourism
10. Facilitating High Quality Accommodation Facilities
11. Destination Making
12. Developing Tourism Product Clusters
13. Facilitating Business Innovation and Jobs Growth
14. Managing Land Use Conflicts
15. Improving the Road Infrastructure Network
16. Improving the Information Technology Network
17. Clarifying Uses in the Rural Conservation and Farming Zones
18. Refining Planning Policies

Next Steps

The next steps of the Hinterland Future Strategy development process are summarised as follows:

- Consultation on issues and opportunities with stakeholders and the community;
- Preparation of a draft strategy;
- Consultation on the draft strategy with stakeholders and the community; and
- Finalisation of the Hinterland Future Strategy.

Implementation of adopted strategy recommendations would then be undertaken by Council and other stakeholders.



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