

Phillip Island Nature Parks

Summerland Peninsula

Infrastructure & Procurement Master Plan

03.10.2012



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Executive Summary

1. BACKGROUND

Phillip Island Nature Parks (Nature Parks) is an award winning, not-for-profit organisation dedicated to international excellence in nature conservation and eco-tourism. The Nature Parks manages an area of over 1,805 hectares that is home to unique wildlife and spectacular coastal scenery which includes the Summerland Peninsula.

The Summerland Peninsula at the western tip of Phillip Island is home to the number one natural wildlife attraction in Australia, the Penguin Parade. The Penguin Parade Visitor Centre (Visitor Centre) currently receives approximately 500,000 paying visitors per annum (55% international) with thousands more experiencing the Summerland Peninsula for its recreational offering. The Nature Parks is one of the largest regional contributors to international overnight visitation to Victoria which is reflective in Phillip Island's economy recording an 18.7% reliance on tourism; the highest of any region in Victoria.

The significant economic benefits generated by the Penguin Parade are an important component of the Victorian and regional tourism economy and the Nature Parks is the largest employer on Phillip Island.

Nature Parks operations sustain major research, conservation and education programs and maintain a range of general recreation assets without ongoing funding from State or Federal Governments. The Nature Parks operation depends on commercial

revenue predominantly sourced from the Penguin Parade and specific funding grants for major infrastructure renewal, site development and some major environmental management projects.

The Summerland Infrastructure and Procurement Master Plan (Master Plan) is intended to establish:

- A creative and innovative redirection for the Nature Parks facilities and the Summerland Peninsula setting which is capable of providing a clear and compelling narrative to underpin the visitor experience. The Master Plan is not just a design exercise; it is concerned with defining the nature of the Summerland Peninsula as a 'destination' and establishing a planning and design philosophy that recognises the inherent values and building those unique qualities into the visitor experience.
- A precinct wide vision that encapsulates the potential of the site for more diverse and layered eco-tourism and recreation experiences and better integrates environmental management, education and research within the visitor experience.
- New or replacement facilities that represent best practice contemporary design standards for eco-tourism facilities and redefine the relationship between the Nature Parks, the Summerland Peninsula and the local community.

The Victorian State Government has stated that 'Victoria is not waiting, but doing everything in its power to capitalise on new opportunities in high growth tourism markets, particularly India and China'. Part of the Coalition Government's economic strategy is to focus on trade engagement and expansion into new tourism markets to create jobs and investment. Victoria is moving quickly to benefit from the extraordinary growth that is occurring in these key international markets and the proposed Master Plan closely aligns with current Government tourism policies, including Victoria's China Tourism Strategy (May 2012) and growth in international markets including India and Malaysia. Opportunity exists to capitalise on the State's natural assets and previous investment in the Summerland Peninsula to further protect and enhance biodiversity and regional economic activity over the next 20 years.



- ROAD & PARKING NETWORK
- PEDESTRIAN NETWORK
- SCENIC VIEWPOINTS
- PROPOSED / EXISTING BUILDINGS

Master Plan



Potential Nature-Based Tourism Hubs



Nature Parks Portfolio



Penguin Parade Precinct 2011



2. CONTEXT

Existing Penguin specific and wider infrastructure within the Summerland Peninsula does not meet current international eco-tourism expectations and is inadequate to cater for projected visitation growth, resulting in lost economic and public land benefit to the region and State. The Master Plan responds to this problem and also an extensive State Government, Tourism Victoria and Phillip Island Nature Parks policy framework including demonstration of the Nature Parks' vision as follows: To be a world-recognised place of conservation excellence, providing outstanding and authentic experiences for all.

Victoria's China Tourism Strategy 2012

The Strategy outlines priorities to increase tourism visitation and yield from China by 2020. It targets all visitor segments and aims to realise the potential of the Chinese visitor market beyond a 'business as usual' growth prediction of 7% to a rate of more than 11% per year with major benefits in terms of visitor expenditure, regional dispersal and employment. Redevelopment of the Penguin Parade is specifically identified as a key element of this strategy.

Biosphere Reserve System

Phillip Island and Westernport Bay form part of the Mornington Peninsula and Westernport Biosphere Reserve, an integrated ecological and cultural system with significant biological, cultural and visual values. The Biosphere Reserve system includes iconic places and ecological reserves with designated values such as Ramsar wetlands, Marine Parks, National Parks, historic sites and reserve areas. The Summerland Peninsula and broader Nature Parks portfolio form an integral part of this system.

Conservation and Tourism Network

Phillip Island has the potential to be one of several nature based tourism 'hubs' that represent the unique ecological and cultural values of the Victorian coast and Biosphere Reserve Area. Networking of ecological and cultural assets will enhance regional nature-based tourism values and extend the length of stay and regional dispersal of international and domestic tourists with regional employment and economic benefits.

India Tourism Strategy

The emerging Victorian State Government India Tourism Strategy is focussed on developing India as a key inbound tourism market with high growth potential. The Nature Parks and Penguin Parade closely align with Tourism Australia's 'Quality Experiences Strategy' and are seen to be a key future destination for Indian visitors.

Climate Variation Policy

The Future Coasts Program led by the Victorian Department of Sustainability and Environment and the Department of Planning and Community Development is intended to develop a better understanding of the risks associated with sea level rise and storm surge effects to inform related policy and building practices. The planning and design of all future Nature Parks facilities will consider the potential effects of climate variation under the climate variation policy framework.

Nature Parks Strategic Plan 2012 - 2017

The Nature Parks Strategic Plan 2012 - 2017 endorsed by the Minister for Environment and Climate Change in May 2012 articulates the Nature Parks key objectives and directions for the period 2012 to 2017. It identifies the current challenges facing the Nature Parks and establishes priorities for protecting and enhancing its portfolio. The Nature Parks will structure its decision making and measure its success on a comprehensive framework demonstrating a critical balance between conservation, recreation and eco-tourism. A key priority within the Strategic Plan is to address the risks posed by the ageing infrastructure of the Penguin Parade Visitor Centre.

Indigenous Cultural Heritage and Reconciliation Action Plan

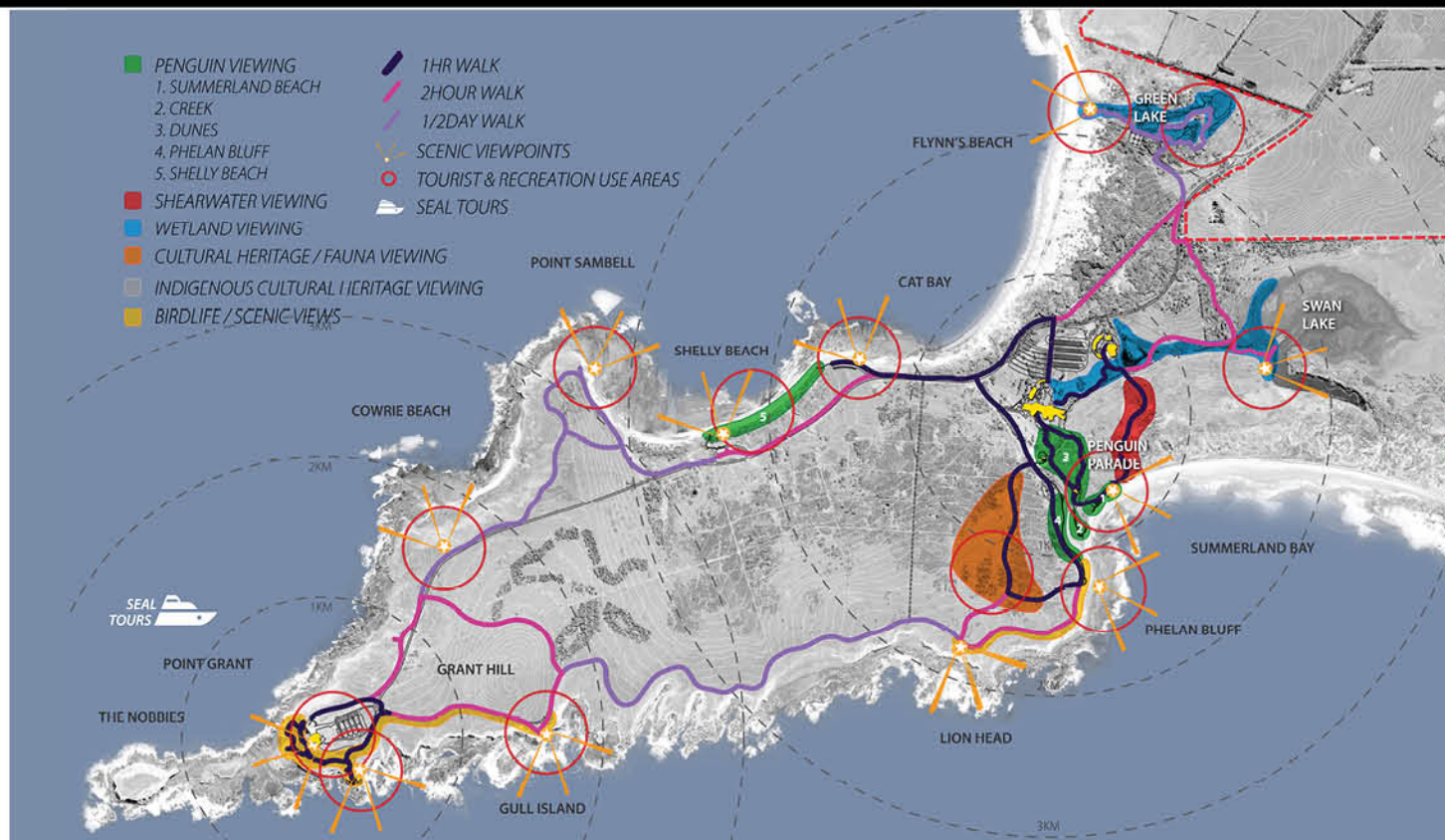
The Summerland Peninsula has been subject to detailed cultural heritage assessment which together with the Nature Parks Reconciliation Action Plan identifies opportunity for the Nature Parks to interpret cultural heritage sites and also engage with the local indigenous community. Any future design and development within the site will be consistent with the recommendations of this study and Aboriginal Affairs Victoria requirements.

Summerland Precinct Strategic Framework Plan (2011)

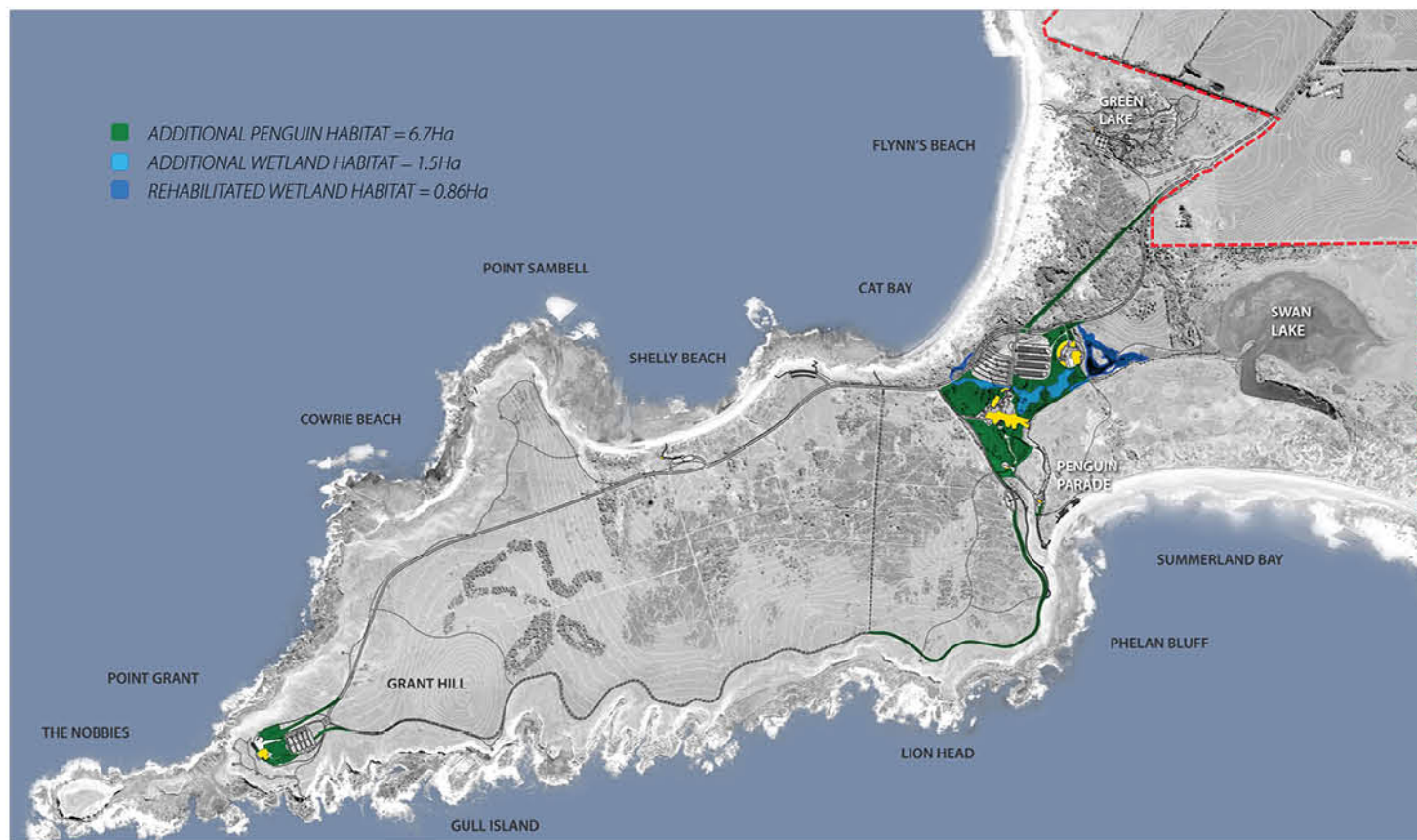
This study evaluates the existing Summerland site, facilities, tourism and business performance and develops a schematic site plan that describes a preferred vision and a long term philosophy and site development strategy. This document is the foundation for this Master Plan.

Nature Based Tourism Policy (2008-2012)

Victoria's Nature-based Tourism Strategy outlines the importance of sustainability in nature-based tourism products and destinations with the objective that Victoria will be recognised as the leading sustainable nature-based tourism destination in Australia and renowned for its diverse and accessible natural attractions. It is intended that the Nature Parks portfolio and the Penguin Parade in particular, will function as a leading example of nature-based tourism within Victorian, Australian and international tourism markets.



Proposed Recreation & Eco-Tourism Network



Habitat Gain Area

3. KEY PROJECT OUTCOMES

The Master Plan achieves the following key outcomes:

- A philosophy for change and a consistent, reasoned approach to development, design and management within the site. The outcome strongly validates the Summerland housing buy-back and provides a new basis for engagement with the local community and other user groups.
- An overall net habitat gain of approximately 8.2Ha, comprising 6.7Ha of Penguin habitat (able to accommodate up to 1,446 new breeding Penguins and 201,000 new plants) and 1.5Ha of new wetland habitat as well as extensive areas of dune, grassland and woodland rehabilitation.
- An enhanced tourism product that has strong brand alignment to Victoria's China Tourism Strategy and India Strategic Plans along with other prime international tourism markets (including US and UK), and MICE (meeting / incentive / conference / events) market segments.
- Infrastructure to achieve greater visitor experience and cater for the estimated 100,000 additional visitors per annum by 2020.
- Business continuity and maintenance of existing service offering, employment and international market share through Visitor Centre relocation.
- New tourism products including a world class eye-level underground Penguin viewing facility, modern site interpretations systems, new scenic based boat tours, new indigenous cultural heritage tours and expanded wildlife viewing opportunities within the site.
- Protection and growth of the Nature Parks internationally recognised and environmentally accredited brand.
- Integration within the Visitor Centre of leading scientific and educational programs.
- Growth in tourism yield based on new and expanded premium products an increased length of tourist stay.
- Estimated return on investment of 9.9%, meeting the required return for a public tourism investment.
- Diversifying and dispersing visitors across the Summerland Peninsula through new and upgraded features, trail networks and recreational nodes to increase length of stay and maintain international overnight stay in Victoria.
- Redeveloped Nobbies Centre which is consistent the Nature Parks values and visitor needs.
- Relocation of non-site specific operations from the Penguin Parade precinct to a central location at the Nature Parks managed Koala Conservation Centre site.
- Facilities that cater to the varying volumes of visitors and to their individual needs and preferences including non-English speaking visitors and the special access requirements of all mobility users.
- Development of a major nature based tourism hub within the Westernport Bay / Mornington Peninsula / Gippsland region which will lead to greater networking between eco-tourism sites, greater regional dispersal and related economic and employment benefits.
- New access facilities and services that support the use of the Summerland Peninsula's beaches as a National Surfing Reserve.
- Maintenance of the existing Nature Parks self-funding model over the long term and increased levels of funding to be allocated to core conservation, research and education activities across the Nature Parks portfolio.
- Rehabilitated landscape with new and upgraded recreation facilities, trail networks, cultural heritage features, interpretations systems and infrastructure which supports a wider range of social and recreation users and other daytime visitors making the site a more diverse, multi-layered visitor destination that invites exploration.



4. CURRENT SITUATION

The Master Plan responds to the following key issues:

- The Visitor Centre and site facilities were established in 1988 and need significant redevelopment. Poor facility standards, crowding and a generic product offering is providing a sub-standard experience for many visitors.
- Visitor Centre and parking area is located on land that was originally prime Penguin habitat and therefore should not be refurbished on the existing site.
- Wider Summerland Peninsula development is based on historical land use patterns that are not relevant to current Nature Parks or visitor uses.
- The Nobbies Centre was initially established as a private enterprise with a different purpose. Existing infrastructure is not suited to current needs and is physically and visually intrusive in its current form.
- Penguin Parade brand is at risk of failing to deliver regional and State tourism benefits without proactive change to match facilities, products and services to key markets.
- The dispersal potential of the whole Summerland Peninsula as a regional hub for nature based recreation is not utilised.
- Current tourism interest is narrowly focussed on the Penguin Parade and Nobbies locations rather than the Summerland Peninsula as a 'destination' with a range of ecological, landscape, tourism and recreation values. This narrow 'attraction' based perception weakens the identity and potential role of the Summerland Peninsula as a major visitor destination.

5. BUSINESS FEASIBILITY

The Master Plan considered the business feasibility of recommendations throughout the life of investment with the following key findings:

Economic benefits

Based on economic modelling performed by Ernst & Young, the Nature Parks contributes \$125.3 million (2010-11) economic activity to the State and \$63.8 million benefit to Bass Coast Region. Implementation of the proposed Master Plan is expected to:

- Increase the Nature Parks economic contribution to the region and the State.
- Maintain international and interstate overnight stay in Victoria

- Increase ticketed visitation from 500,000 to 600,000 promoting regional investment and leading to broader benefits for the regional and State economy.
- Increase in recreational visitation, regional dispersal and regional employment.
- Increase financial returns which will maintain the Nature Parks self-funding model and ensure that there is no long term reduction in conservation, research, education and other core Nature Parks activities.
- Avoidance of \$11.1 million in immediate backlog maintenance and a further \$6.5 million of additional maintenance over the next 15 years.
- Ongoing maintenance and service efficiency cost gains related to environmentally sustainable design outcomes.

Total project investment

The overall cost for the proposed multi-year, multi-staged investment is estimated at \$106.3 million including contingencies. Master Plan implementation is likely over three stages:

Stage 1 investment

Stage 1, has a project cost of \$71.3 million over three years; this includes new entry road, parking, Visitor Centre, off site relocation of non-site-specific operations, Penguin viewing areas and improvements at Flynn's Beach / Green Lake.

Stages 2 & 3 investment

Stages 2 & 3, has a project cost of \$35.0 million implemented by 2020; this includes the Nobbies precinct redevelopment and improvements to recreation and conservation areas.

Projected net revenue following completion of the investment:

- Based on the total investment of \$106.3 million, net revenue following completion of the proposed Master Plan is estimated at \$10.5 million. This provides a net return on investment of 9.9% and an increase of \$5.1 million from existing net revenue (2010-11: \$5.4 million).
- Based on \$71.3 million Stage 1 investment, net revenue is estimated to be \$9.1 million. This provides a net return on investment of 12.8% and an increase of \$3.7 million from existing net revenue (2010-11: \$5.4 million) which is an acceptable level of return for the proposed investment.
- Sensitivity analysis of the Stage 1 investment shows that if visitation were to remain at 500,000, the return on investment would be 10.8% which would also meet the required return for a public tourism investment.

6. IMPLEMENTATION STRATEGY

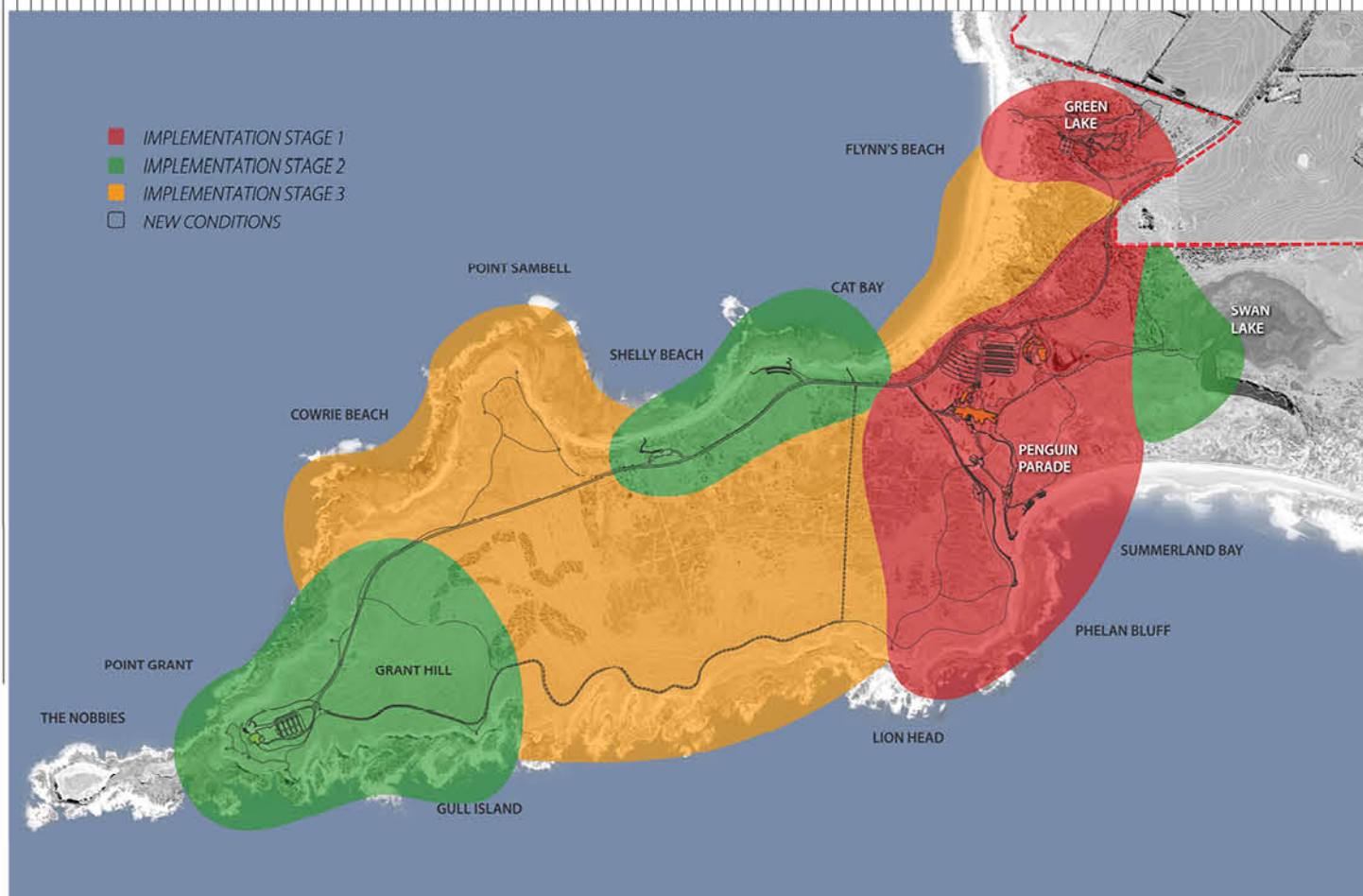
The Master Plan implementation strategy is based on the following principles:

- The implementation strategy must allow business continuity, limit interruption to existing visitor services and facilitate habitat conservation across the Summerland Peninsula. On that basis, the first stage of Master Plan implementation will include works related to the new site entry, Visitor Centre precinct and the establishment of two key habitat rehabilitation areas at Green Lake and the Penguin Parade area.
- The relocation of non-site specific Nature Parks functions to the Nature Parks managed Koala Conservation Centre site is essential to the implementation of other Master Plan elements, including conservation and habitat restoration works.

- The second stage will include works related to Point Grant (Nobbies) and main beach recreation areas and the Swan Lake area. The third stage will deal with remaining works and habitat restoration across the site.

The Master Plan provides a precinct wide vision and creative redirection for the Summerland Peninsula which can be implemented through multi-government and Nature Parks initiatives. The proposed infrastructure and services meet contemporary design standards yet are non-complex, capable of implementation and maintenance by current Nature Parks management with appropriate procurement.

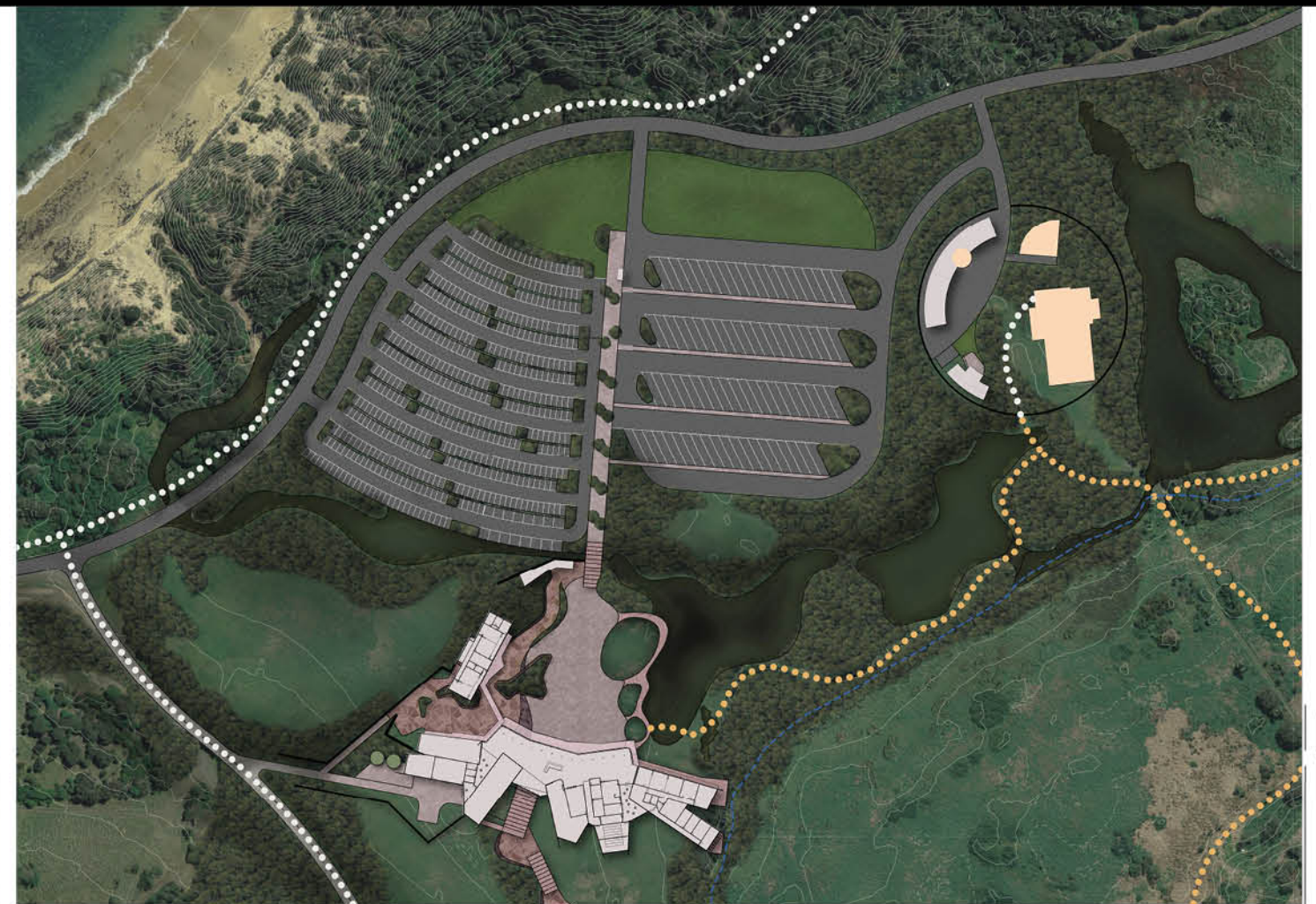
Summary of the Master Plan site analysis and design components follows below and are further detailed in the Master Plan Report.



Implementation Strategy



Visitor Centre Arrival Area



Visitor Centre & Arrival Area

7. MASTER PLAN DESIGN

The Master Plan approach is guided by the following site planning and design drivers:

The location of Nature Parks facilities and services

The majority of Nature Parks administrative and maintenance services are currently located within the Penguin Parade precinct including the Visitor Centre. The Master Plan is based on a principle of only developing site specific uses within the Summerland Peninsula. On that basis, the Master Plan proposes the relocation of non-site specific facilities away from the Summerland Peninsula to an alternative location within the portfolio best suited to those functions and to the operational efficiency of the Nature Parks.

The Master Plan proposes the development of a new Nature Parks management and multi-use facility centralised at the Nature Parks managed Koala Conservation Centre site. This site is centrally located on Phillip Island and does not have the habitat and amenity restrictions, space constraints or specialist building cost requirements of the Summerland Peninsula. Under this proposal, only site specific facilities will still be located within the Summerland Peninsula.

The Nature Parks primary purpose of conservation will be clear through the location of facilities and services, including integration of long term scientific research and educational programs within the Visitor Centre.

Site design drivers

The Master Plan is shaped by a number of key design drivers:

Habitat rehabilitation

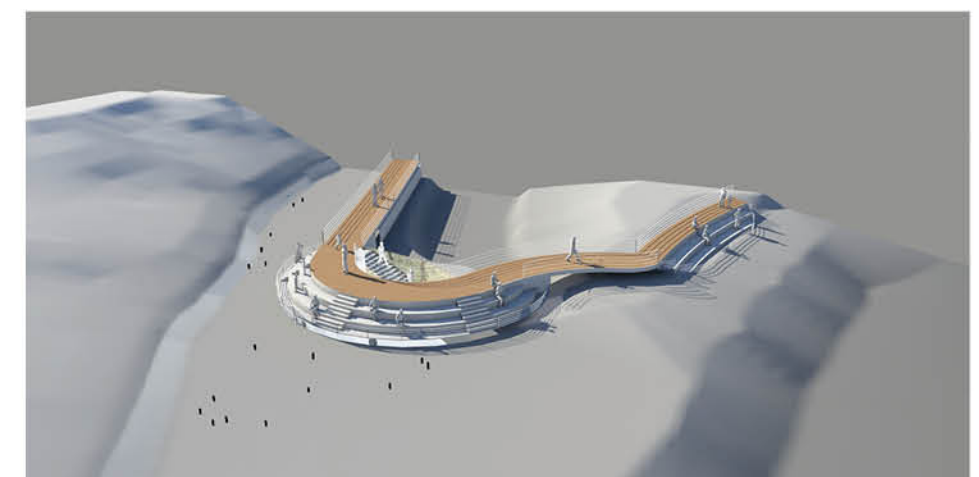
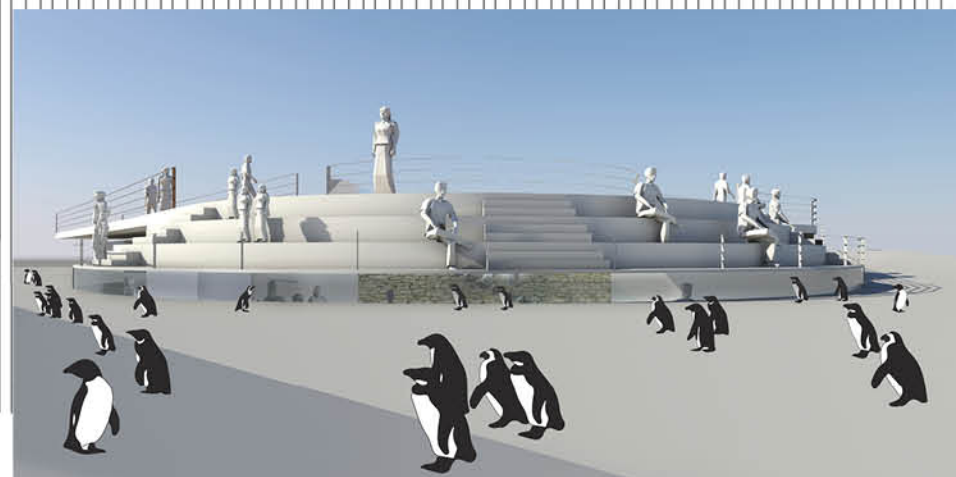
- Site infrastructure across the Summerland Peninsula will be located and designed to maximise conservation values, re-establish natural ecological and landscape systems and give priority to pedestrians over vehicles.
- The Visitor Centre and arrival facilities will be relocated away from their present location to allow for the re-establishment of substantial areas of prime Penguin habitat (the bluff landform edge) and wetland habitat (creek floodplain). The new Visitor Centre will be located at the intersection of three major landscape systems – basalt bluff, coastal dune and wetland and designed to demonstrate the nature of the coastal environment.
- New access road alignments and parking arrangements will allow the re-connection of divided habitat areas and allow for the development of higher landscape and visual values across the site.



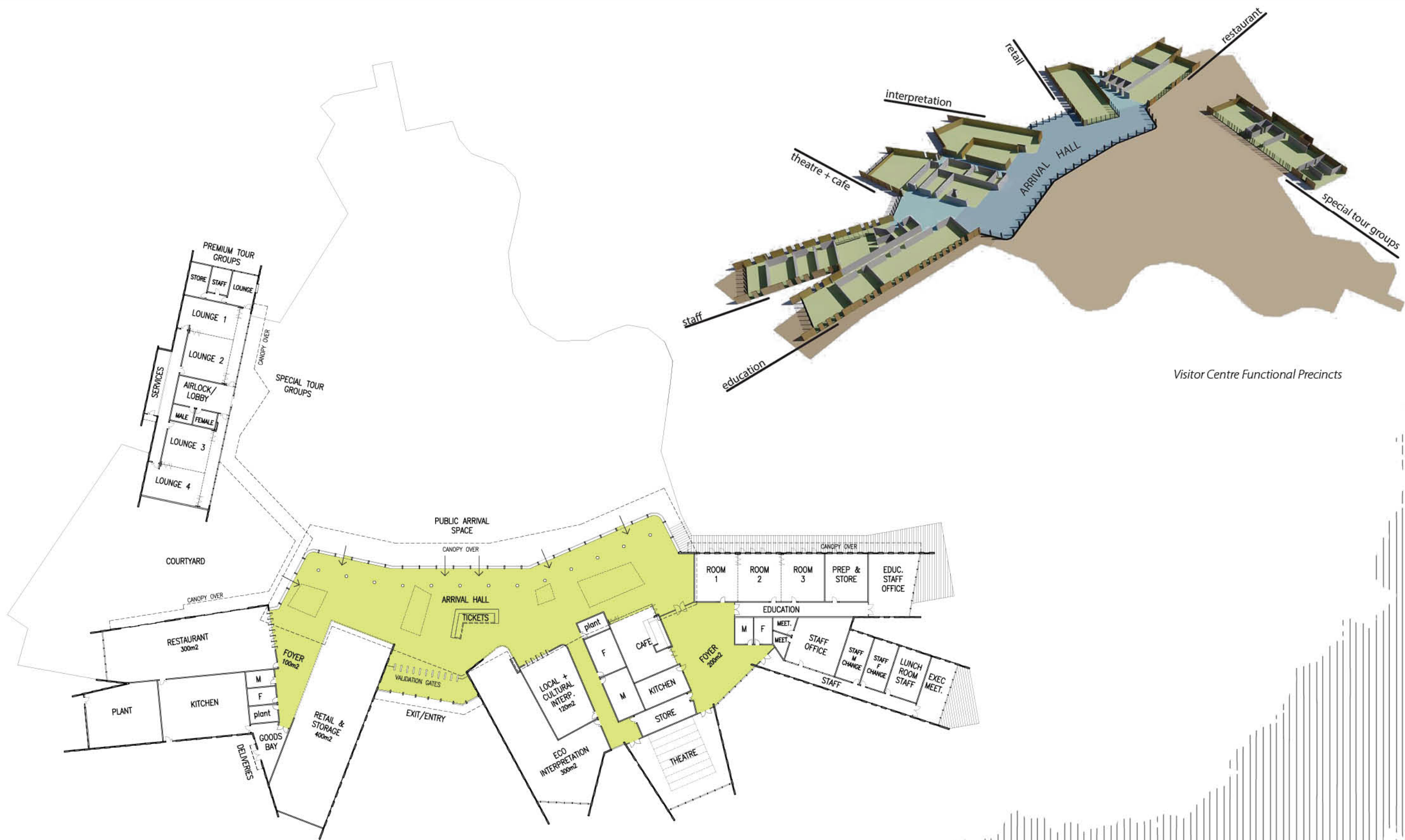
Main Penguin Viewing Area



Proposed Penguin Viewing Area



Proposed Underground Viewing Facility



Visitor Centre Plan View



Design standards

- Facilities will meet contemporary functional and capacity requirements and be designed to meet the varying needs of individuals, groups, varying visitor numbers and event based uses.
- New site facilities will meet the special access and mobility requirements of all users.
- The design and siting of the Visitor Centre will demonstrate a site specific response to climate where the building 'shelters' within the landscape and in turn, provides shelter for visitors. The building is specifically oriented to maximise Environmentally Sustainable Design benefits.

Visual character and quality

- Design will be highly site specific. Facilities will be designed to fit within the landscape of the site and to demonstrate a clear relationship to the physical setting.
- Transport and services infrastructure will be designed to achieve minimal impact on ecological systems, landscape quality and the visitor experience. Infrastructure will be designed to minimise impacts on the quality of the visitor experience and pedestrian environment.

The nature of the visitor experience

- Site planning will provide an inviting visitor experience that provides visitors with an intuitive understanding of the site and its landscape. The design of the Penguin Parade setting will encourage visitors to explore their environment rather than viewing the site as a single static destination based around the concrete terraces and the beach.
- The setting will provide a wide variety of trail options, 'loops of interest' and destinations to encourage visitors to visit the site in daylight hours and to spend more time exploring the site and its attractions.
- The Phelan Bluff precinct will become an integral part of the main Visitor Centre precinct with day and evening wildlife viewing and cultural interpretation features.

Environmentally sustainable design

- The Visitor Centre will be a leading scientific and educational institution recognised nationally and internationally for its research and education programs and its role as an iconic eco-tourism destination. The Visitor Centre and site infrastructure systems will be fully integrated into the landscape and environment of the site and embody the highest standards of environmentally sustainable design in accordance with Building Code of Australia Section J – Energy Efficiency requirements and the Green Building Council of Australia – Greenstar Public Building rating tool.
- The Visitor Centre is expected to achieve a Greenstar Design Rating of 5 which represents 'Australian Excellence'.
- The Master Plan design will limit the development of transport infrastructure on the site, and over the long term introduce the use of public transport at peak use times.



Visitor Centre - View South From Main Arrival Space



8. The key arguments for change

Why change anything? What is the overriding need for major change?

- Past land uses shaped site infrastructure in a manner that did not maximise conservation, habitat and ecological values (the purpose of the Nature Parks), or related eco-tourism and recreation values. The government land buy back of the Summerland Estate provided the first opportunity since early settlement to develop a fully integrated conservation, eco-tourism and recreation focussed site plan.
- Existing facilities and tourism experiences do not meet contemporary design standards and are unlikely to sustain the site as a premier eco-tourism destination over the long term. Major change is required to meet user expectations, sustain site values and the business model on which underpin all other Nature Parks operations.
- The current facilities have a \$4.2 million maintenance backlog and high future maintenance and repair costs. A new facility will avoid short term maintenance costs and will be designed for maximum long term durability.

Why move the Visitor Centre and the carpark?

- The existing building is not fit for purpose and cannot be expanded on its current site without having a major impact on penguin habitat or resulting in a fragmented and inefficient building and service delivery model that covers a larger site area. Moving the facility to an already disturbed area allows the re-establishment of large areas of prime penguin habitat and wetland habitat areas that have been destroyed by previous land uses.
- The current development area covers prime penguin habitat. Moving key infrastructure onto already disturbed areas allows for the re-establishment of 6.7Ha of penguin habitat (equivalent to 1,446 penguins and 201,000 new plants) and 1.5Ha of new wetland habitat. This is a very significant improvement in habitat values within the site.

Why move the Visitor Centre only 200 metres?

- This is the closest non penguin habitat area. This is an already disturbed location still allows simple vehicle and pedestrian access patterns to penguin viewing areas while allowing habitat and visitor amenity gains. All pedestrian access paths will be Disability Discrimination Act (DDA) compliant.
- The building site is a visually interesting location at the intersection of three major landscape types (basalt bluff / dunes / wetland) which represent the landscape and visual character of the peninsula. The proposed site is an ideal central location from which a visitor can begin an exploration of the site and allows walking access to Swan Lake, Cat Bay, Shelly Beach and other recreation areas.

Why is the new Visitor Centre so much larger than the existing facility?

- The existing building functions as a visitor control point rather than a 'visitor centre' in the true sense. The existing building is not large enough for peak visitor demand, does not have the services expected of a modern visitor centre, is not fit for purpose and does not meet appropriate design benchmarks.
- The proposed design is based on actual visitor numbers and Summerland functions and meets contemporary design standards

Why modify the existing penguin viewing area?

- Current infrastructure has a major visual impact on the site and results in crowded and sub-standard conditions for visitors. The intention is to create a more dispersed pattern of wildlife viewing that provides a closer fit to the landscape and a higher level of amenity and choice for visitors.
- With the removal of housing from the Summerland Estate area, the number of penguins and their spatial distribution is changing. The proposed pattern of viewing infrastructure more closely matches the emerging distribution of penguins and opens up new viewing opportunities for visitors.

- The new infrastructure system provides a wider variety of pedestrian settings, more shelter, toilets and seating, more interpretation opportunities and more movement options. The intention is to create a richer and more diverse visitor experience that includes a wider variety of habitat types. This change is consistent with the development of Summerland as a 'place' with a diversity of ecological and tourism values rather than a single beach based attraction.

What is gained by the spending on existing non-penguin areas such as the beach recreation areas?

- The Nature Parks philosophy is based around three elements, conservation, eco-tourism and social imperatives including recreation. It is appropriate that all of Summerland's values are addressed through the Master Plan. These are high use locations that require significant environmental rehabilitation and ongoing management.
- The philosophy which underpins this project is based on a 'whole site' approach. The Master Plan will rehabilitate and redefine the nature of a degraded 'place' rather than only focussing only on the Penguin Parade 'attraction'.
- Areas such as Cat Bay and Shelly Beach have long term potential to become new penguin viewing destinations (Shelly Beach is already used for beach based tours), therefore their rehabilitation is consistent with the more specific penguin / wildlife viewing objectives.

Why the major change to the Nobbies setting and building?

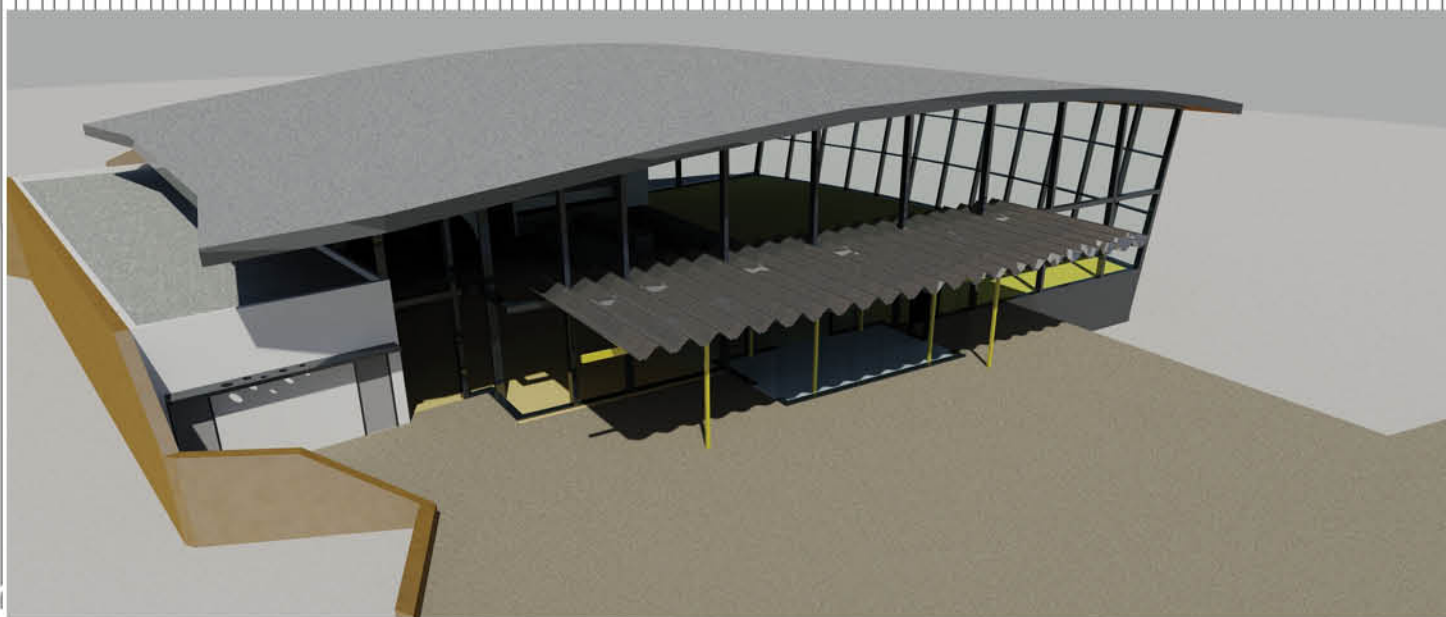
- The current building has a major adverse impact on the landscape and visual quality of the setting and only part of the building is used at this time. The building design does not meet contemporary design standards and is not relevant to current visitor needs.
- There is a need for a major visitor support facility at the site and the current building form is capable, with significant modifications, to meet those needs and still achieve the design and performance philosophies outlined within the Master Plan process. Removing the current structure and rebuilding would also achieve these objectives but potentially at a higher cost.
- The design re-establishes the Point Grant / Nobbies precinct as a place for people and wildlife and reduces the impact of traffic and parking on the landscape and visitor amenity. This is consistent with broader site design principles of valuing the visitor experience and site ecology above existing infrastructure patterns.



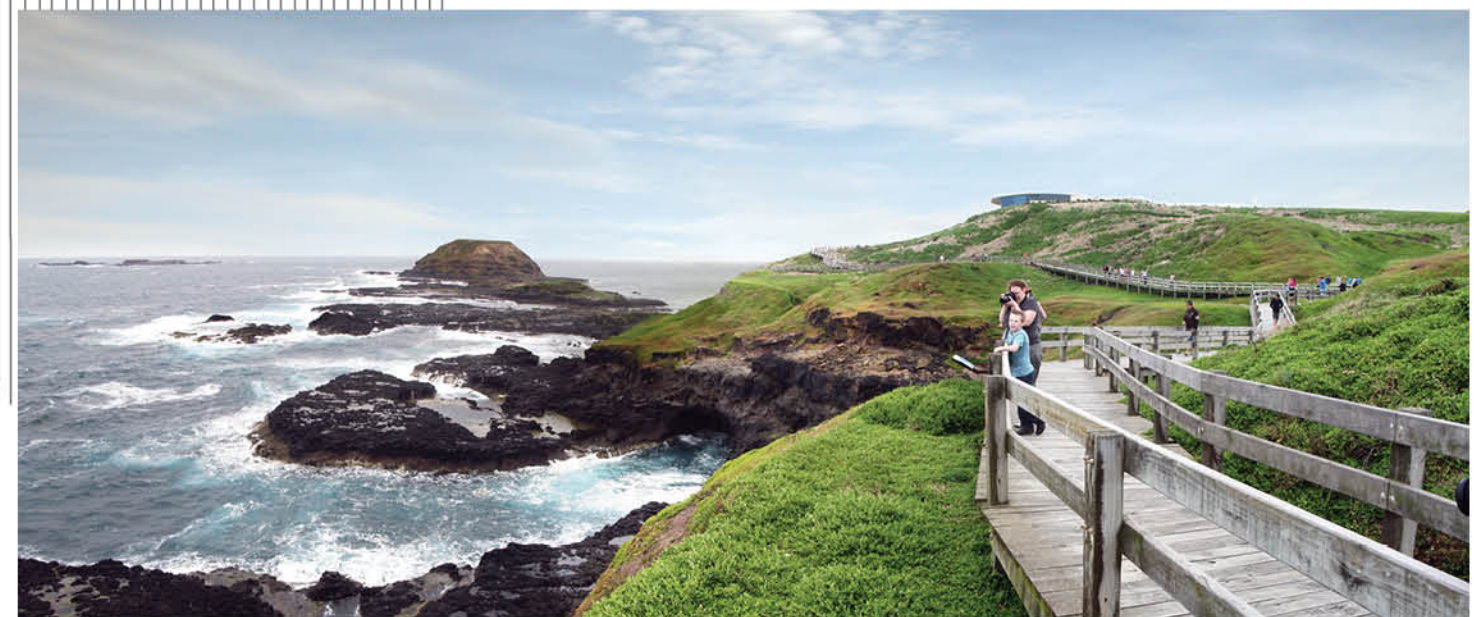
Point Grant / Nobbies Centre - View To Main Arrival Area



Point Grant / Nobbies Centre - Plan View Of New Facilities



Nobbies Centre - Proposed Building Entry



Point Grant / Nobbies Centre - Existing Blowhole Lookout Boardwalk