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ACTIVATING LAKE EILDON

LAKE EILDON MASTERPLAN

TOURISM NORTH EAST | MAY 2020



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**REGIONAL
DEVELOPMENT VICTORIA**

**REGIONAL
PARTNERSHIPS
GOULBURN**

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FILE

Lake Eildon Masterplan_Urban Enterprise 2020

VERSION

1

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PARTNERS



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ACRONYMS

DELWP	Department of Environment, Land, Water and Planning
GMW	Goulburn-Murray Water
HB	Houseboat
IVS	International Visitor Survey
LER	Lake Eildon Region
LENP	Lake Eildon National Park
MTB	Mountain Bike
NTB	Nature-based
NVS	National Visitor Survey
PAVE	Population and Visitor Estimator Model
RTO	Regional Tourism Organisation
SA4	Statistical Area 4
TRA	Tourism Research Australia

GLOSSARY OF TERMS

Direct Impacts	Direct output or value of development or construction activity.
Employment	Represents the number of people employed by businesses / organisations in each of the industry sectors in a defined region. Employment data presented in this report is destination of work data. That is, no inference is made as to where people in a defined region reside. This employment represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.
Output	Represents the gross revenue generated by businesses / organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

EXECUTIVE SUMMARY

TOURISM CONTEXT

BACKGROUND AND CONTEXT

Urban Enterprise has been engaged by Regional Development Victoria to develop the Lake Eildon Tourism Masterplan and Business Cases. The project has been delivered in partnership with Tourism North East, Goulburn Murray Water, Mansfield Shire and Murrindindi Shire.

The Masterplan forms the second stage of the Activating Lake Eildon Project, following Stage 1 which was completed by Urban Enterprise in May 2019.

Lake Eildon is Victoria's largest inland water storage, which provides a dual irrigation and recreation role. The Lake's primary role is to supply rural water for irrigation purposes, and bulk water for the provision of potable water to rural towns and environmental purposes to Goulburn-Murray Water (GMW) entitlement holders. Its secondary role is to provide a recreation offering for local residents and visitors to the region.

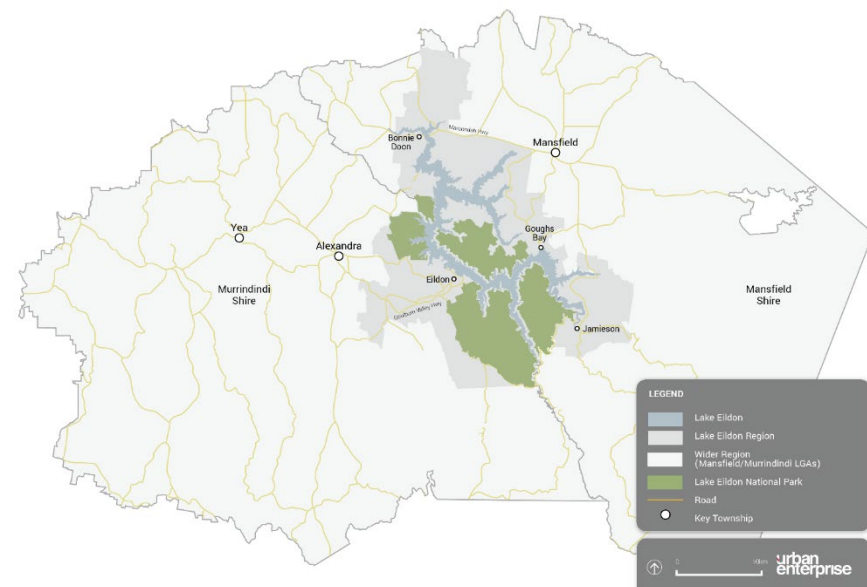
Lake Eildon has suffered from a lack of investment over the past two decades, due to a range of challenges including severe long-term drought, inconsistent governance due to multiple land managers, unsuitable land zoning for development, and lack of supporting infrastructure to facilitate investment.

The purpose of the Masterplan is to establish a shared vision for the activation of Lake Eildon, identifying priority tourism and recreation developments within an environmentally sustainable framework that optimise economic outcomes for the region.

THE REGION

The Lake Eildon region is located in North East Victoria, approximately 150 km from Melbourne, with over 500 km of shoreline and covering an area of 13,840 hectares. Lake Eildon is one of the most recognisable and popular recreational water bodies in Victoria, enjoyed by residents and visitors alike.

Key townships across the region include Eildon, Bonnie Doon, Goughs Bay and Jamieson. These townships are popular destinations for visitors to the region, many of whom are frequent visitors owning holiday homes, caravans and houseboats.



Lake Eildon region in context of wider region (i.e. Mansfield and Murrindindi Shires)

STRATEGIC CONTEXT

A range of federal, state and local strategies and policies have been analysed to understand the current strategic context of Lake Eildon and the wider region.

In line with Australia's federal and state tourism strategies, there is significant opportunity for the Lake Eildon region to further enhance and support its own natural assets through improved infrastructure, investment in high-quality tourism products and experiences, as well as through skills development for local industry.

Numerous local management studies have been developed for Lake Eildon that are relevant to the Activating Lake Eildon Project. These studies identify a vast amount of actions, with a focus on localised infrastructure improvements such as boat ramps and public realm projects.

The Activating Lake Eildon Project needs to prioritise investment across the region, given the scale of investment required. This will ensure that funding is provided to areas that have both the greatest potential for return on investment, and also meet development objectives that will enhance tourism outcomes for the region.

LAKE EILDON REGION VISITOR ECONOMY ASSESSMENT

Lake Eildon region receives approximately 900,000 visitors per annum, driven largely by overnight visitation to camping and caravan destinations and holiday homes. The majority of visitors to the region (87%) were visiting for nature-related purposes.

Visitors to the Lake Eildon region are relatively low yielding, spending an average of \$153 per person per trip compared to \$340 for visitors to the High Country.

The total economic impact of tourism and recreation within the Lake Eildon region is estimated at \$486 million in output and 2,548 jobs to the Hume region. This accounts for direct visitor expenditure within the Lake Eildon region, as well as expenditure by holiday home and houseboat owners within both Mansfield and Murrindindi Shires.

The majority of overnight visitors (70%) are mainly self-supporting, either not paying for or paying very little for accommodation. This is considered to be the Habitual visitor market. These are frequent visitors to the region who have fairly fixed visitation patterns and low levels of expenditure.

The key target market for the Lake Eildon region is the Lifestyle Leader market. This is a higher yielding, progressive market who are willing to try new experiences, and have a desire for high quality tourism product. This strategy will aim to develop initiatives to target the Lifestyle Leader market, in order to drive economic growth and sustainable tourism development through increasing visitor yield.

PRODUCT SUPPLY AND OPPORTUNITIES

The Lake Eildon region is primarily a nature-based destination, with key strengths in both water-based and land-based natural assets and associated activities. Key natural assets include Lake Eildon, numerous rivers, and Lake Eildon National Park. There are also a number of surrounding natural assets, including Cathedral Ranges State Park, Mount Buller and Lake Mountain, which drive visitation to the wider region and can be leveraged to encourage greater visitation to the Lake Eildon region.

Key strengths in the Lake Eildon region include waterways (Lake/rivers), fishing, recreational boating, other water-based activities (e.g. kayaking, jet skiing), outdoor adventure activities (e.g. hunting, four wheel driving), and camping. Although these are key strengths of the region, they are difficult to access for casual visitors who do not own the required equipment and facilities, as there are limited opportunities to hire equipment or undertake tours.

The Lake Eildon region lacks some basic supporting tourism product that drives visitors and entices them to stay in the region, including contemporary commercial accommodation, quality food and beverage establishments, and family-friendly activities.

There is also a lack of consolidated information available online to inform visitors to the region of tourism and recreation activities and experiences available to them, which can deter other visitor markets (i.e. not Habitual visitors) from visiting or staying in the region.

Strengthening the primary and secondary nature-based assets of the Lake Eildon region, as well as building on identified opportunities, will be key to the development of the region as a high quality nature-based destination.

PRODUCT AND ACCOMMODATION DEMAND ASSESSMENT

The Lake Eildon region is projected to grow significantly, with an estimated growth of 604,922 visitors by 2030. This highlights the need for both private and public sector investment to provide a unique and attractive experience to service these visitors, including investment in key product gaps, infrastructure and visitor services.

With the identified projected growth, there will be a critical need to deliver quality contemporary tourism experiences that will assist in attracting the Lifestyle Leader market, as well as delivering projects that will extract greater yield from the Habitual market.

The region lacks quality commercial accommodation and there are very few 'hot beds' in the region, due to many caravan/camping sites being annual sites that are unable to be rented by casual visitors. As a result, there is a projected accommodation need of 685 rooms by 2025. New accommodation should be contemporary and high quality to attract the Lifestyle Leader market.

Respondents to the visitor survey undertaken during Stage 1 of the Activating Lake Eildon project identified a range of improvements needed to the visitor experience across the region. These include the need for an improved dining offer, increase in access to water and improved infrastructure (including boat ramps and roads).

Respondents would be most motivated to travel to the Lake Eildon region outside of peak season for events, fishing and activities. These key focus areas highlight the need for investment in tourism product and experiences that focus development away from on-water experiences.

SETTLEMENT, PROPERTY AND INFRASTRUCTURE

The Lake Eildon region has a small and low growth population base of approximately 3,500 people. There is a significant holiday home base throughout the region, which causes most of the population growth through the transition of holiday home owners to permanent residents.

The region has an ageing population, with a median age of 56 across the region, compared to Regional Victoria (43). There is a need for increased community

services and growth in jobs to attract younger residents to the region. This will strengthen the workforce and grow the regional economy.

There is a lack of zoned land to support development in the Lake Eildon region, particularly in terms of limited Commercial 1 Zone (C1Z) and General Residential (GRZ1) zoned land in town centres, constraints on National Park Land development due to Public Conservation and Resource Zone (PCRZ), and limitations on commercial development due to the Farming Zone (FZ).

The largest settlements are Eildon and Bonnie Doon. Settlements are dispersed throughout the region, with fragmented townships, dispersed population and sporadic investment in infrastructure and township amenities. Key townships of Jamieson and Goughs Bay are constrained by a lack of sewerage, with Bonnie Doon and Eildon having access to sewerage and potable water but requiring upgrades. Sewerage upgrades will unlock significant development potential across the region.

Strategic prioritisation of investment should be considered in the key townships of Eildon, Goughs Bay and Bonnie Doon. This is due to a range of factors such as consistent access to Lake Eildon across a range of water levels, proximity to Mansfield and Alexandra, existing town centres, higher population bases, sewerage and water infrastructure in Eildon and Bonnie Doon, and potential to capitalise on visitation to Mount Buller for Goughs Bay and Bonnie Doon.

GOVERNANCE AND LAND MANAGEMENT

There are a range of public land managers in the Lake Eildon region, with major land holdings managed by Parks Victoria, DELWP and Goulburn-Murray Water. This means it is difficult to ensure consistent approaches to land management and visitor services across the region, which has been a major factor hindering tourism development in the Lake Eildon region over the past few decades.

Due to the complexity of having multiple land managers, lack of resourcing of existing land managers as well as the region spanning two Local Government Areas, improved governance is needed to support delivery of this masterplan as well as manage ongoing infrastructure improvements, visitor servicing, marketing and investment facilitation.

A range of relevant Governance options are explored in this report, with consideration of funding methods, statutory policy required and services provided by each governance model. The options considered include:

- Regional or Local Tourism Organisation;
- Statutory Management Board;
- Committee of Management;
- Improvement to the existing governance model: including MOUs between existing organisations and leveraging further from Tourism North East.

It is recommended that improvements to the existing governance structure and relationships be delivered in the immediate term to assist in delivery of the masterplan through an MOU between key stakeholders and land managers. Longer term alternative models may be investigated. These would need much greater level of investigation including a detailed feasibility study, particularly in relation to understanding potential funding models.

ISSUES AND OPPORTUNITIES

Key considerations regarding governance and leadership within the Lake Eildon region include:

- Multiple stakeholders and land managers, resulting in:
 - Lack of coordinated brand and marketing for Lake Eildon;
 - Inconsistent approach to visitor servicing;
 - Confusion in relation to who is responsible for visitor services;
 - Lake infrastructure, foreshore areas and access areas have little ongoing investment and result in poor amenity outcomes for visitors;
 - No responsible authority for events and activation across the Lake; and
 - Lack of resources dedicated to the above.
- Lack of marketing and brand; and
- Opportunity to utilise GMW freehold land and provide guidance of its use.

Key considerations regarding settlement, property and supporting infrastructure include:

- Poorly planned settlement pattern;
- Need for settlement hierarchy and prioritised investment;
- Poor amenity at water access destinations;
- Lack of zoned land to support development;
- Lack of reticulated water and sewer and limited capacity of existing systems;
- Inconsistent water levels and access to deep water;
- Low and declining population and workforce; and
- Low socio-economic residential demographic.

Key considerations for product development and investment include:

- Limited investment in nature based experiences;
- Low levels of fixed commercial accommodation and lack of investment in contemporary accommodation;
- Limited food and beverage experiences;
- Limited waterfront investment;
- Opportunity to link Bonnie Doon and Eildon;
- Limited family friendly product;
- Limited accessibility of boating and water recreation facilities for hire by casual visitors;
- Low visitor yield and high seasonal variability; and
- Lack of large scale tourism businesses.

MASTERPLAN FRAMEWORK

VISION

The Lake Eildon region will fulfil its potential as Australia's premier inland water destination, with enhancement of its water-based tourism assets, activation of nature-based tourism, and improvement to the visitor experience in the key destination villages surrounding the Lake.

OBJECTIVES

The following are strategic objectives that respond to the issues and opportunities identified through preparation of the masterplan:

- Attract Lifestyle Leader market segments to the region;
- Improve the experience of current water-based and nature-based visitors;
- Grow visitor yield through investment in accommodation, food and beverage product and nature based tours and experiences;
- Improve the general amenity of the region, in particular the key towns and villages;
- Focus investment to create a critical mass of product at key visitor nodes;
- Support improved activation of and access to the Lake;
- Deliver improved governance and management of visitor services, tourism infrastructure, marketing and investment attraction.

STRATEGIC FRAMEWORK

The following themes for tourism investment have been developed, in line with the vision and strategic objectives for the Lake Eildon region.

T1: IMPROVE THE EXPERIENCE FOR EXISTING VISITOR MARKETS

Focus: Improve the visitor experience for existing visitor markets through infrastructure and amenity improvements, and investment in contemporary product.

T2: NEW PRODUCT TO REACH TARGET MARKETS

Focus: Deliver new contemporary products that are unrelated to water-based activities to grow year round visitation and attract new visitor markets.

T3: INVESTMENT IN ENABLING INFRASTRUCTURE

Focus: Deliver enabling infrastructure that will unlock investment potential at strategic locations.

T4: IMPROVED DESTINATION MANAGEMENT

Focus: Deliver improved governance and resources to facilitate visitor servicing, activation and marketing.

PERFORMANCE MEASURES – 2020-2025

The following performance measures have been developed as key indicators for following the progress of the Lake Eildon Masterplan.

- Grow visitor spend per person from \$153 to \$200 by 2025 [Data sourced from intercept surveys of Lake Eildon];
- Grow overnight stays by an additional 250,000 visitors, from 775,674 to 1,034,821 in 2025 [Data sourced from Urban Enterprise PAVE model and visitation projections].

PROJECT ASSESSMENT CRITERIA

The following assessment criteria have been used to prioritise projects. Projects which meet the greatest number of these criteria have been identified to be developed as Business Case projects or Tier 1 level projects.

1. Large scale/game-changer.
2. Enabling infrastructure and investment.
3. Expands regional product offer.
4. Improves awareness and perception of the region.
5. Aligns to high-value target markets.
6. Increases visitor yield.
7. Seasonal dispersal.

8. Increases visitation.
9. Improves community liveability and lifestyle attractiveness.

Business Case Projects

Four large projects have business cases prepared for them. These projects align to the project assessment criteria and have the following attributes:

- Large scale project;
- Large economic impact;
- Can be delivered within short time frame; and
- Require substantial funding.

Tier 1 – Regional Impact Project

Tier 1 projects are large scale projects that align well to the project assessment criteria. These projects may require substantial funding, however may also have major constraints that impact on the short term deliverability. These projects have the following attributes:

- Large scale project;
- Large economic impact;
- Potential constraints leading to longer timeframe for delivery; and
- Requires substantial funding.

Tier 2 – Sub-regional Impact Project

Tier 2 projects are smaller scale projects that may also service community need. Their impact is more localised. These projects have the following attributes:

- Smaller scale projects;
- Localised impacts; and
- Potential community projects that will facilitate tourism outcome.

BUSINESS CASE PROJECTS

The following projects have been identified as ‘game-changers’ for the Lake Eildon region, as they fulfill a critical product or experience gap in the region, and will help to support further investment in tourism. These projects have been developed into Business Cases to provide strategic justification for investment. These projects include:

- **Premier Nature-Based Precincts at Mt Pinniger (Eildon) and Fry Bay (Goughs Bay).** Development of nature-based precincts will create visitor destinations with high-quality trails and treetop experiences, outdoor activities, integrated dining facilities at key vantage points, low-impact eco-accommodation, and development of iconic walking trails.
- **Skyline Road Tourist Precinct.** Capitalising on the immersive views of Lake Eildon from Skyline Road, the development of the Skyline Road Tourist Precinct will include formalisation of the Great Lake Touring Route, boutique food and dining experiences, architectural look out points, and experiential accommodation overlooking Lake Eildon.
- **Large-scale Accommodation Investment.** The development of large-scale accommodation in Goughs Bay and Eildon will fulfil a critical gap in commercial accommodation and conferencing and events facilities, appeal to a broad market, and provide key entertainment, dining and leisure facilities that are currently lacking within the region. Large-scale integrated accommodation will also promote off-peak visitation to the region.
- **Sewerage System Investment.** Investment in sewerage infrastructure will help to build the visitor nodes of Goughs Bay and Jerusalem Creek into key visitor destinations, by unlocking development potential through the removal of infrastructure barriers that can often deter potential investors, as well as improving environmental outcomes.

PRIORITY PROJECTS

A range of Tier 1 and Tier 2 Priority Projects have been identified for the region, based on extensive consultation, research and using the assessment criteria detailed in the Masterplan.

Tier 1 projects identified for the region include:

- Investigation of a New Governance Arrangement for the Lake Eildon region;
- Development of a Lake Eildon Brand and Marketing Strategy;
- Development of Primary Lakeside Visitor Precincts, including Goughs Bay, Jerusalem Creek, Eildon and Peppin Point;
- Redevelopment of Golden Trout Brewery Bistro and Visitor Accommodation;
- Township Landscape Masterplans for key visitor destinations of Bonnie Doon, Eildon and Goughs Bay; and
- Creation of a Nature-based Recreation Hub at Eildon.

Tier 2 projects identified for the region include:

- Upper Pondage Fishing Lodge;
- Eildon Destination Mountain Bike Park;
- Bonnie Doon Adventure Park;
- Deliver Lake Eildon Masterplan Planning Scheme Amendments;
- Eildon Waterplay Park;
- Cultural Touring;
- Touring Boat Bar;
- Eildon Walking Trail;
- Mansfield to Goughs Bay Cycling Trail;
- Parks Victoria and DELWP NBT Experience Development;
- Peppin Point Day Visitor Precinct and Community Hub;
- Bull Ring Open Air Events Precinct;
- Dam Wall Light Installations/Shows;
- Bonnie Doon Rail Bridge Light Activations;

- Bonnie Doon Waterplay Park;
- Tours and Activities/Watercraft Hire;
- Visitor Servicing and Signage Strategy;
- Lake Eildon Investment Portal;
- Goulburn River Tourism Precinct;
- Nature Based Experiential Accommodation;
- Blue Gums Caravan Park to Eildon Township Trail;
- Blue Gums to Eildon Pipeline; and
- Goughs Bay to Mountain Bay Cycling Trail.

Further detail on each of the Business Case, Tier 1 and Tier 2 Priority projects can be found in *Part B: Masterplan*.

PART A. TOURISM CONTEXT

1. BACKGROUND AND CONTEXT

1.1. BACKGROUND

Lake Eildon currently provides dual roles. Its primary role is to supply rural water for irrigation purposes, bulk water for provision of potable water to rural towns, and environmental purposes to Goulburn-Murray Water (GMW) entitlement holders. Its secondary role is to provide a recreation offering for local residents as well as visitors to the region.

The Activating Lake Eildon Project includes two stages of work:

- **Stage 1:** An economic impact of the value of tourism and recreation within the Lake Eildon region; and
- **Stage 2 (This Report):** A masterplan and business case to prioritise investment and provide a cohesive strategy for land and water assets.



1.2. METHODOLOGY

Stage 2 of the Activating Lake Eildon Project includes the following elements of work:

- **Policy and Strategic Context.** Analysis of existing policy context and strategic documentation relevant to the Lake Eildon region.
- **Stakeholder Consultation.** Extensive stakeholder consultation has been undertaken with Local Government, Government Agencies, Industry Members and Associations, Community Associations and Community Groups. See Appendix A for further details on consultation approach and key outcomes.
- **Site Visits.** Site visits were undertaken across the months of August-December, touring the Lake, townships and key visitor precincts, to identify key site opportunities and constraints associated with the region and specific sites.
- **Governance Review.** An analysis of constraints and issues associated with the tourism development under the current governance model was undertaken, as well as analysis of success factors of other governance models and considerations for the Lake Eildon region.
- **Infrastructure and Planning Assessment.** An assessment of planning controls and infrastructure, including sewerage, water and Lake access, was undertaken through primary research with government agencies, and desktop research.
- **Product and Experience Audit.** Primary and secondary research were undertaken to create a detailed audit of tourism product and experiences throughout the Lake Eildon region.
- **Masterplan Framework.** Development of a framework for the masterplan, including identification of underlying principles for future development, themes for project development, and criteria for project prioritisation.
- **Project Development.** A range of Tier 1 and 2 projects were developed as a result of stakeholder consultation, primary and secondary research, and analysis of successful case studies.
- **Project Prioritisation.** Through consultation with stakeholders and the Project Steering Group, projects were prioritised for Business Case development.

1.3. CONSULTATION

Extensive consultation was undertaken as part of Stage 1 and Stage 2 of the Activating Lake Eildon Project, including workshops, 1:1 meetings, and a survey conducted as part of Stage 1 (approximately 1200 responses).

The project is led by a Steering Group comprised of key stakeholders from Regional Development Victoria, Goulburn-Murray Water, Tourism North East, and Mansfield and Murrindindi Shires, who provided context and strategic direction for the project.

T1. STAKEHOLDERS CONSULTED WITH

Stakeholder Type	Stakeholder Group
State Government Agency	Parks Victoria (Strategic Direction team in Melbourne, and in-region team in Alexandra)
	Department of Environment, Land, Water and Planning
	Goulburn-Murray Water
	Victorian Fisheries Authority
	Taungurung Clans Aboriginal Corporation
	Goulburn Valley Water
	Better Boating Victoria
Local Government Workshops	Murrindindi Shire Council – Staff and Councillors
	Mansfield Shire Council – Staff and Councillors
Local Businesses & Other Stakeholders	Boating Industry Association of Victoria
	Lake Eildon Marina
	Owners of Golden Trout Hotel
	Owners of Bonnie Doon Hotel
	Mansfield Business and District Association
	Lake Eildon Houseboat Industry Association
	Owner of Goughs Bay Special Use Zone
Community Groups	Goughs Bay Progress Association
	Peppin Point Community Group
	Bonnie Doon Community Group
General Community Workshops	A total of 102 community members attended community workshops in October 2019. Workshops were held in Bonnie Doon, Eildon, Alexandra, and Mansfield.

KEY FINDINGS OF CONSULTATION

The consultation phase of the project was crucial to the identification of key issues, opportunities and areas of strategic focus for the Lake Eildon region.

The broad findings of the consultation identified the following focus areas:

- Need to expand and enhance nature-based assets, particularly focusing on land-based assets to broaden the tourism offering;
- Need for investment in food and beverage experiences, particularly redeveloping key sites such as the Golden Trout Hotel;
- Critical need for investment in contemporary and experiential accommodation, as there is no accommodation greater than 3.5 stars in the region;
- Need for family friendly activities to attract and retain visitors in the region;
- Need for improved governance and branding of the region;
- Need to improve access to water for fishing, boating, watercrafts, swimming etc.;
- Need for township amenity improvements, including public parkland, township beautification, improved signage, rubbish removal and façade treatments;
- Need for basic infrastructure (i.e. sewerage and water) to unlock development potential in towns like Goughs Bay; and
- Need for improved infrastructure and amenity at existing visitor nodes, including toilets, landscaping, boat ramps, floating pontoons etc.

1.4. LAKE EILDON REGION STUDY AREA

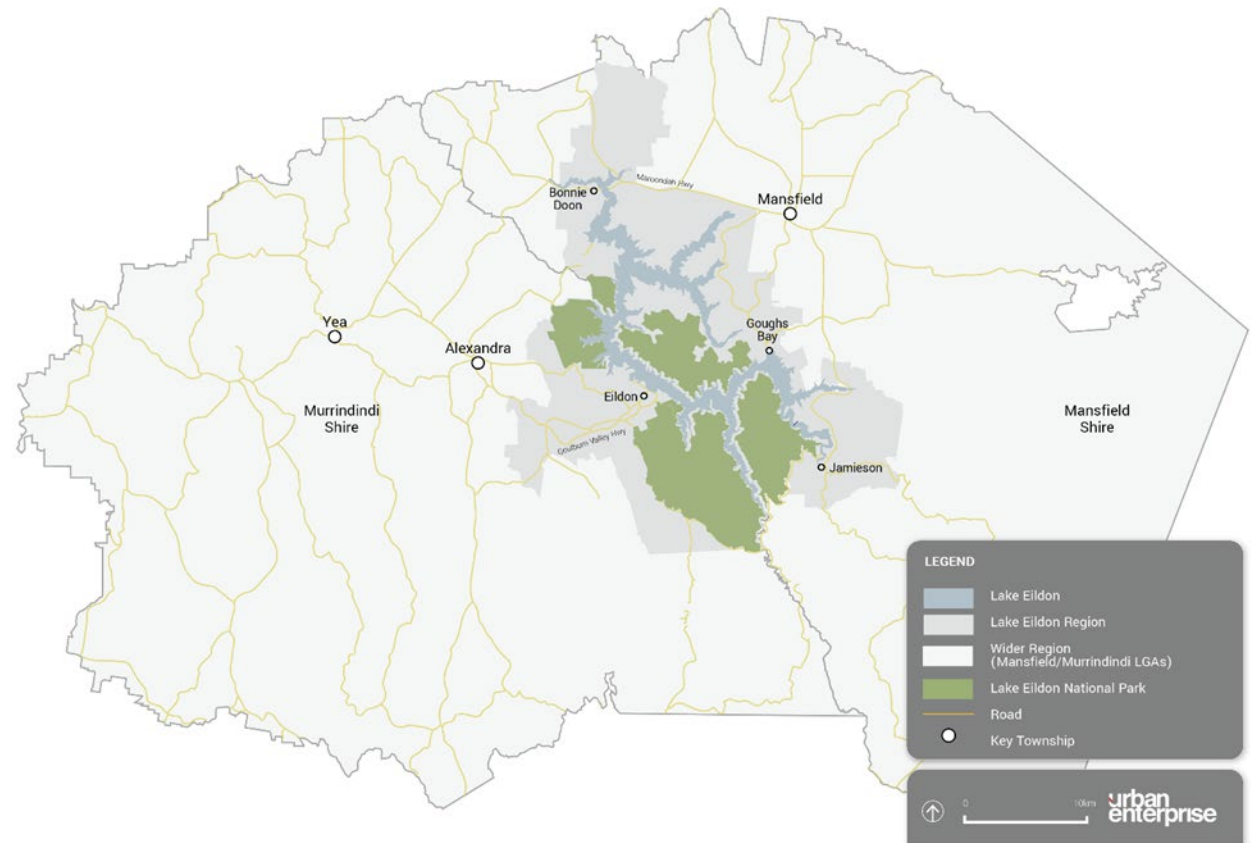
Figure F1 shows the context of Lake Eildon within the surrounding LGAs of Murrindindi Shire and Mansfield Shire.

As shown in Figure F1, the Lake Eildon region includes the land and townships more closely surrounding Lake Eildon, including the Lake Eildon National Park land. This is further detailed in Figure F2, which shows a breakdown of the localities within the Lake Eildon region.

Expenditure and economic impact modelling has been prepared for Murrindindi and Mansfield Shires, rather than the Lake Eildon region. The reason for this is that the majority of expenditure is generated in other townships, including Alexandra, Mansfield, Yarck and Yea, which have retail, food and beverage, and visitor services, and less so within the Lake Eildon region.

The Lake Eildon region is promoted by Tourism North East (Mansfield Shire area), LakeEildon.com, and through visitor information centres in Murrindindi Shire and Mansfield.

F1. LAKE EILDON REGIONAL CONTEXT



Source: Urban Enterprise, 2019.

Figure F2 shows the Lake Eildon region study area in further detail. The region has been broken into subregions in order to target assessment to consolidated visitor nodes.

This includes the nine subregions of Bonnie Doon, Howes Creek, Goughs Bay/Mountain Bay, Macs Cove/Howqua, Jamieson, Eildon/Taylor Bay, Thornton, Fraser and Delatite Plantation.

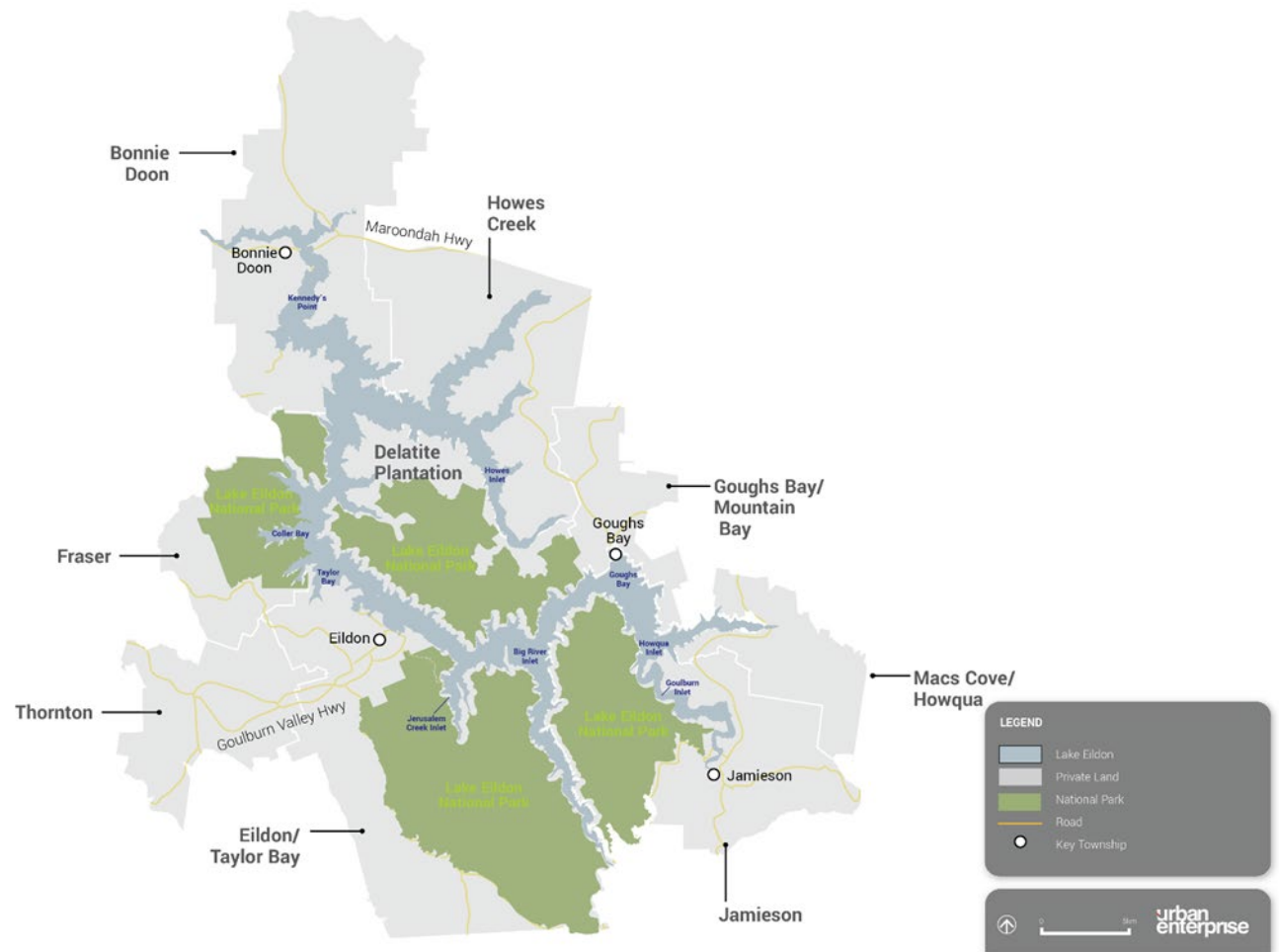
The localities within each subregion are detailed further in Table T2.

T2. SUBREGIONS AND LOCALITIES WITHIN

Subregions	Localities within Subregion
Bonnie Doon	Bonnie Doon
Howes Creek	Howes Creek, Maindample, Mansfield
Goughs Bay/Mountain Bay	Goughs Bay, Mountain Bay
Macs Cove/Howqua	Macs Cove, Howqua, Howqua Inlet
Jamieson	Jamieson
Eildon/Taylor Bay	Eildon, Taylor Bay
Thornton	Thornton
Fraser	Devils River
Delatite Plantation	Delatite Plantation, Delatite Arm etc.

Source: Urban Enterprise, 2019.

F2. LAKE EILDON STUDY AREA



Source: Urban Enterprise, 2019.

1.5. OVERVIEW OF REGION

Lake Eildon is located approximately 150 km from Melbourne in north-east Victoria, with over 500 km of shoreline and covering an area of 13,840 hectares. Lake Eildon is one of the most recognisable and popular recreational water bodies in Victoria, enjoyed by residents and visitors alike.

Key townships across the region include Eildon, Bonnie Doon, Goughs Bay and Jamieson. These townships are popular destinations for visitors to the region, many of whom are frequent visitors owning holiday homes, caravans and houseboats.

Alexandra and Mansfield are the key regional centres on either side of the Lake, with each settlement along the Lake no more than 30 minutes' drive from either centre. These townships act as anchors for visitors to the region.

Tourism in the area is currently promoted online by Lake Eildon Tourism, a dedicated branded website that advertises the area's activities and product, as well as Visitor Information Centres in Eildon (run by volunteers), as well as in surrounding key townships of Alexandra, Yea and Mansfield.

HISTORY OF DEVELOPMENT

Lake Eildon is a key inland water storage controlled by Goulburn-Murray Water, with a primary role of providing water to downstream irrigation customers who purchase bulk water entitlements.

Lake Eildon was originally constructed to allow for the storage of water between 1915 and 1929. The Lake has been modified several times throughout its history to increase its water storage capacity, with its current capacity at 3.3 million megalitres.

A 5,200 ML pondage below the dam temporarily detains water discharged from the power station and regulates releases downstream to minimise variations in flow due to intermittent power generation. In 1995, a small hydro-electric station with 4.5 MW output was installed on the pondage.

Prior to the construction of Lake Eildon, the land was a key meeting spot for the Taungurung Indigenous clan, and therefore significant Indigenous heritage remains within the Lake.

ACCESS AND ROADS

Lake Eildon is a 2.5 hour drive from Melbourne, with key access routes into the region including the Hume Highway, Maroondah Highway, Melba Highway, Goulburn Valley Highway or Mansfield-Woods Point Road.

Eildon township is the closest in proximity to Melbourne, with Bonnie Doon being a popular destination for many visitors drawn to the region by both Lake Eildon and the nearby Mount Buller, due to its location on the Maroondah Highway.

Township	Travel Time from Melbourne	Key travel routes
Eildon	2 hrs and 15 mins	<ul style="list-style-type: none">• Hume Hwy → Goulburn Valley Hwy• Maroondah Hwy
Bonnie Doon	2 hrs and 30 mins	<ul style="list-style-type: none">• Hume Hwy → Goulburn Valley Hwy• Maroondah Hwy → Goulburn Valley Hwy
Jamieson	3 hours	<ul style="list-style-type: none">• Melba Hwy → Goulburn Valley Hwy → Mansfield-Woods Point Rd• Hume Hwy → Goulburn Valley Hwy → Mansfield-Woods Point Rd
Goughs Bay	3 hours	<ul style="list-style-type: none">• Melba Hwy → Goulburn Valley Hwy → Mansfield-Woods Point Rd• Hume Hwy → Goulburn Valley Hwy → Mansfield-Woods Point Rd

LAKE EILDON USAGE REGULATIONS AND POLICY

Goulburn-Murray Water (GMW) is the statutory authority responsible for the management and operation of Lake Eildon under the Water Act 1989. Goulburn-Murray Water controls the following key areas:

1. The application, issue and transfer of licenses, including both private and commercial houseboat licences;
2. The numbers and types of houseboat licenses, including both private and commercial houseboat licences;
3. The control of waste, including standards for blackwater treatment; and
4. Fees for administration of licenses.

Lake Eildon is the only inland waterway in Victoria where houseboats are permitted to operate. It is Goulburn-Murray Water's role to control and manage houseboat operations, including water quality and other issues associated with over 700 houseboats on the Lake.

The regulations apply to all licensed houseboats, all new houseboats, and all existing houseboats that require a transfer of licence. A new or used houseboat cannot be brought onto the Lake without first submitting an application form and a licence being issued by GMW.



2. STRATEGIC CONTEXT

2.1. INTRODUCTION

This section provides an overview of the strategic and policy context for the Lake, including environmental/water-related strategies, as well as the broader tourism context for the region. This includes key drivers of the project and helps to understand the relationship between the Lake, tourism and the visitor economy.

Key information discussed in this section was sourced from a review of Government – Federal, State, Regional, Local – and Government Agency strategies and policies.

2.2. KEY FINDINGS

A range of federal, state and local strategies and policies have been analysed to understand the current strategic context of Lake Eildon and the wider region.

In line with Australia’s federal and state tourism strategies, there is significant opportunity for the Lake Eildon region to further enhance and support its own natural assets through improved infrastructure, investment in high-quality tourism products and experiences, as well as through skills development for local industry.

Common tourism development themes across these strategies include:

- Growing and attracting private sector investment in quality tourism experiences;
- Maintaining a diverse product mix;
- Leveraging natural assets through supporting infrastructure and amenity;
- Developing authentic Aboriginal experiences;
- Leveraging growing demand from Asia; and
- Developing international awareness and readiness for business owners.

Numerous local management studies have been developed for Lake Eildon that are relevant to the Activating Lake Eildon Project, including Lake Eildon Recreational Boating Facilities Improvement Plan, Lake Eildon Land and On-Water Management

Plan, Fraser Visitor Experience Area Strategic Plan and Lake Eildon National Park Management Plan.

There are a vast amount of actions identified across the studies, with a focus on localised infrastructure improvements such as boat ramps and public realm projects. The Activating Lake Eildon Project needs to prioritise investment across the region, given the scale of investment required. This will ensure that funding is provided to areas that have both the greatest potential for return on investment, and also meet development objectives that will enhance tourism outcomes for the region.



2.3. FEDERAL TOURISM CONTEXT

There are a range of high level tourism strategies which outline key directions and focus areas for the tourism industry Australia wide, with relevant themes that can be applied to tourism at the regional and local level.

Key Federal tourism documents analysed include:

- **Tourism 2020 Strategy, Tourism Australia (2030 Strategy currently underway).**
 - Key areas of focus identified for tourism development:
 - Encourage high-quality tourism experiences, including Indigenous tourism;
 - Limit the tax, red tape and other regulatory burden industry faces;
 - Undertake coordinated and effective marketing campaigns to drive demand; and
 - Work with industry to support the development of tourism infrastructure that can drive demand.
- **Nature Reserves and Conservation Parks In Australia Industry Report, IBISWorld.**
 - The report identifies significant demand for nature-based tourism product across Australia, based on 3.0% annual growth in industry revenue between 2013-18 to \$1.7 billion, with 2.2% annual growth predicted to occur between 2018-23.
 - This report supports the rising popularity of eco-tourism and nature-based visitation, providing strong support for investment in Lake Eildon infrastructure and national park facilities.

Common themes across these strategies include growing private sector investment and improving capability and capacity in the tourism sector, growing demand from Asia and international readiness, and encouraging nature-based tourism and leveraging natural assets

2.4. STATE CONTEXT

There are a range of State Government tourism strategies which provide support for tourism development initiatives surrounding Lake Eildon. These include:

- Victorian Government: Our Water Our Future Policy
- Victorian Visitor Economy Strategy 2016;
- Victoria's Tourism And Events Management Strategy 2016-2020;
- Victoria's Aboriginal Tourism Development Strategy 2015;
- Victorian Regional Economic Development And Services Review 2015;
- Victoria's Cycling Tourism Action Plan 2011- 2015; and
- Victoria's Trails Strategy 2014-24.

These reports and policies provide strategic support for growing the Lake Eildon region visitor economy and enhancing the region as a visitor destination. Key findings of these reports identify the following focus areas:

- Existing product diversity in Victoria is integral to the visitor experience, and there is a need to continue strengthening this diversity;
- Need to continue attracting investment into the visitor economy, particularly in and adjacent to natural assets;
- High demand for Aboriginal experiences provides an opportunity to grow cultural tourism, targeting both domestic and international markets;
- Investment in public infrastructure to improve access to destinations and improve visitor experiences at key tourism destinations;
- Opportunity to target Asian visitor markets through targeted product and experience development and marketing; and
- Leveraging the identified cycling strengths of Victoria's High Country region, including road cycling, mountain biking, trails, and major cycling events.

2.5. REGIONAL CONTEXT

Regional strategies incorporating Lake Eildon have been assessed to understand the existing tourism context and to provide strategic direction for the Lake Eildon Tourism Masterplan.

Key regional plans assessed include:

- Hume Regional Growth Plan, Department of Economic Development, Jobs Transport and Resources, 2014;
- High Country Destination Management Plan, 2013-2023;
- Goulburn River Valley Tourism Destination Management Plan, Goulburn River Valley Tourism, 2012;
- Goulburn River Valley Destination Management Plan Update, 2017.

All of these plans support tourism development associated with Lake Eildon, acknowledging that Lake Eildon itself and Lake Eildon National Park have high natural values that need protecting, as well as the critical need to provide an enhanced visitor experience associated with these natural assets.

A range of key priorities were identified for Lake Eildon and the surrounding towns in these regional plans, such as development of Lake Eildon Waterfront and Pondage opportunities, development of Lake Eildon Recreational Boating Facilities Improvement Plan, and a range of associated boating infrastructure improvements.

Although there has been some small-scale investment in terms of infrastructure, there has remained very limited private and public sector investment into the Lake Eildon region. This is a result of a combination of factors, including land management and governance issues, lack of leadership across the region, fragmentation of tourism management and a poor investment climate.

2.6. LOCAL CONTEXT

2.6.1. STRATEGIES AFFECTING LAKE EILDON/LAKE EILDON REGION

VICTORIAN BOATING BEHAVIOUR, TRANSPORT SAFETY VICTORIA, 2015

This report details findings of a quantitative and qualitative study which aimed to understand Victorian recreational boaters' behaviour and attitudes regarding safety, waterways and boating infrastructure. It is based on a survey of registered boat owners in Victoria, derived from registration data.

88% of boaters had used their boat in the previous 12 months, with the majority of boaters (84%) using their boat during the peak period (October through April), while 35% used it during the off-peak period (May through September).

More than one-third of all who had boated in the previous 12 months indicated that they would be willing to pay more for their registration if it helped improve boating infrastructure at the locations where they boated (36%). The main area for improvement nominated by those who said they would be willing to pay more for their boat registration was they wanted to have 'improved boat launch / retrieval facilities' (68%), followed by 41% who said they would like to see 'better navigation aids and signage' and a similar proportion who said there was a need for 'better boating safety education programs' (37%).

25% of survey respondents who said they mostly boated on inland waters said the most common body of water they boated on was Lake Eildon. The main purpose of trip for boating visitors travelling to Lake Eildon was water skiing/wakeboarding/knee boarding etc (62%), followed by fishing (23%), and touring/cruising (15%).

LAKE EILDON LAND AND ON-WATER MANAGEMENT PLAN, GOULBURN-MURRAY WATER, 2012

The Lake Eildon Land and On-Water Management Plan aims to increase communication, consistency, coordination and cooperation between agencies, stakeholder groups and the community to protect the Lake's values and attributes. The plan sets out key actions to be implemented to enhance the environmental, social, recreational and economic values of Lake Eildon over the subsequent 5 years.

The Plan identified 96 actions, of which only a limited number have been completed and/or consolidated. Actions relating to recreation and tourism infrastructure components have been expanded in the LERBFIP, however other key activities in the plan have not been addressed or achieved.

The Plan identifies key areas to be considered and managed in relation to use of the Lake and its surrounds, including:

- Recreation and tourism;
- Land Management;
- Water Quality;
- Cultural Heritage; and
- Planning and Development.

LAKE EILDON RECREATIONAL BOATING FACILITIES IMPROVEMENT PLAN (LERBFIP), GOULBURN-MURRAY WATER

The Lake Eildon Recreational Boating Facilities Improvement Plan (LERBFIP) expands on 15 key actions relating to recreation and tourism infrastructure, which are derived from and build on the 96 actions identified in the Lake Eildon Land and On-Water Management Plan. The Lake Eildon Recreational Boating Facilities Improvement Plan should be read in conjunction and as a supplement to the Lake Eildon Land and On-Water Management Plan 2012, outlined below.

The Improvement plan had 5 key outputs:

- Develop a detailed audit of current facilities that provide for recreational boating;
- Identify the shortcomings of existing facilities;
- Identify gaps in existing infrastructure for future budget bids and funding applications;
- Ensure a coordinated approach by all agencies for the provision of facilities; and
- Improve recreational Boating Safety and accessibility for all user groups.

LERBFIP identifies that Lake Eildon is underperforming from an economic return and user experience perspective.

LERBFIP outlines a course of action for improvement of visitor facilities and is a useful operational document, however there is no mechanism for agreed prioritisation or decision making on projects. In addition, there are no dedicated resources (either financial or human) to deliver on identified strategies and lead action on activities.

The Activating Lake Eildon Project needs to prioritise investment across the region, given the scale of investment required. This will ensure that funding is provided to areas that have both the greatest potential for return on investment, and also meet development objectives that will enhance tourism outcomes for the region.

STRATEGIC DIRECTIONS FOR FRASER VISITOR EXPERIENCE AREA (VEA) LAKE EILDON NATIONAL PARK – BACKGROUND REPORT, PARKS VICTORIA, 2017

The report provides a detailed analysis of Lake Eildon National Park and Fraser VEA, which is located on the junction of three distinct visitor-geographic area and tourism regions in Hume of Victoria. It lies at the northern end of the Central Highlands and Yarra Ranges, the eastern end of the Goulburn River Valley and the south western edge of south western Victoria's High Country.

The report identifies the history of Fraser VEA, including various models of operation and an analysis of opportunities and strengths of the area. The Plan undertakes a study of the profile of the existing visitor cohort and existing facilities, and predicts likely areas of product expansion to meet target group requirements.

The report identified that the Fraser VEA has experienced declining visitor numbers since 2013. This may be the result of increased pricing of overnight campsites in Parks Victoria managed land.

STRATEGIC DIRECTIONS FOR FRASER VISITOR EXPERIENCE AREA (VEA) LAKE EILDON NATIONAL PARK, PARKS VICTORIA; 2017

The strategy aims to address the declining visitation to the Fraser VEA, as well as declining visitor satisfaction, by establishing a distinctive Fraser visitor experience that is built on the natural landscape in a lakeside setting.

The key strategic outcome is the identification of the following three distinct and separable product areas, which should be developed as the main visitor activities:

- Powered Water Sport Activities;
- Nature based and passive activities; and
- Outdoor Education Activities.

Strategic directions are consistent with use of the National Park for recreation.

EILDON STRUCTURE PLAN, MURRINDINDI SHIRE, 2016

Murrindindi Shire undertook a Structure Plan for Eildon Township and surrounds, which aims to articulate a long term land use vision and strategic framework for the area. This will direct future land use, development, population growth, infrastructure provision, economic and tourism development and environmental protection of the area.

The Structure Plan includes a plan for the Eildon Marinas Precinct, showing improved access to a boating ramp, indicative sites for tourist and residential apartments, road upgrades and maintenance for houseboat haulage. Further detailed work is required to identify sites for the proposed apartments. The responsibility for undertaking this work needs to be determined.

A key component of the vision is to clarify opportunities associated with Goulburn-Murray Water land surrounding the Eildon Township. This land offers a potential for new and expanded opportunities and value adding to enhance Township functions, economic development, tourism and recreation opportunities. Planning scheme amendments have the potential to create significant opportunity for private investment moving forward.

LAKE EILDON NATIONAL PARK MANAGEMENT PLAN, 1997

The Lake Eildon National Park Management Plan was published in 1997. The Plan needs to be reviewed and updated, however it is likely this has not occurred due to the long-term negotiations of a joint land management agreement between Parks Victoria and Taungurung.

A joint management plan should be developed by Parks Victoria and Taungurung once the joint land management agreement has been formalised.

3. LAKE EILDON REGION VISITOR ECONOMY ASSESSMENT

3.1. INTRODUCTION

This section includes a breakdown of visitation to the Lake Eildon region in 2018.

Urban Enterprise's PAVE model has been used to estimate total Lake Eildon region visitation and subregion visitation, which better accounts for visitation driven by the holiday home sector than traditional National and International Visitor Survey data.

See Appendix A for further detail on PAVE modelling and Appendix B for Economic Terms and Definitions.

3.2. KEY FINDINGS

There were 869,958 visitors to the Lake Eildon region in 2018, comprised of 89% overnight visitors and 11% daytrip visitors. Overnight visitors are comprised mainly of caravan/camping visitors (48%), followed by visitors staying in commercial accommodation (30%).

The majority of visitors to the region (87%) were visiting for nature-related purposes. Whilst 22% of visitors surveyed were visiting the Lake Eildon region for the first time, 78% of visitors were repeat visitors to the region.

Visitors to the Lake Eildon region are relatively low yielding, spending an average of \$153 per person per trip compared to \$340 for visitors to the High Country. 70% of overnight visitors are mainly self-supporting, either not paying for or paying very little for accommodation (i.e. caravan/camping, holiday home and houseboat visitors markets).

The total economic impact of tourism and recreation within the Lake Eildon region is estimated at \$486 million in output and 2,548 jobs to the Hume region. This accounts for direct visitor expenditure within the Lake Eildon region, as well as expenditure by holiday home and houseboat owners within both Mansfield and Murrindindi Shires.

Key target markets for the Lake Eildon region include Habitual visitors and Lifestyle Leaders. Habitual visitors are frequent visitors to the region who have fairly fixed visitation patterns and low levels of expenditure, whereas Lifestyle Leaders are a higher yielding, progressive market who are willing to try new experiences, and have a desire for high quality tourism product. The region currently attracts a high number of Habitual visitors; this strategy will aim to develop initiatives to target the Lifestyle Leader market, in order to drive economic growth and sustainable tourism development through increasing visitor yield.

3.3. CURRENT VISITOR MARKETS

3.3.1. VISITORS TO LAKE EILDON REGION

	869,958 Visitors in 2018	494,780 (57%) Mansfield Side
		375,178 (43%) Murrindindi Side

It is estimated that the Lake Eildon region attracted 869,958 visitors in 2018. This includes 775,674 (89%) overnight visitors and 94,285 (11%) daytrip visitors. The low level of daytrip visitation across the region is due to the distance from the key source market (Melbourne) being more than two hours' drive and the region being popular during key holiday periods where visitors have the opportunity for an extended stay (e.g. summer holidays and Easter).

Urban Enterprise has undertaken modelling to estimate visitors to Lake Eildon's sub regions. The visitor modelling shows that Eildon/Taylor Bay attracts the largest number of visitors of all destinations (224,926 - 21% of visitors to Lake Eildon region). Other key destinations include Bonnie Doon (135,096 visitors - 16%), Fraser (132,022 visitors - 15%) and Delatite Plantation (92,416 visitors - 11%).

Whilst Eildon/Taylor Bay is the largest visitor node in the Lake Eildon region, there are more visitors to the Mansfield side (494,780) of Lake Eildon than the Murrindindi Side (375,178). The reason for this is that Mansfield Shire has a much larger proportion of Lake frontage and many more dispersed settlements than on the Murrindindi side.

22% of visitors surveyed were visiting the Lake Eildon region for the first time, whereas 78% of visitors were repeat visitors. 53% of visitors surveyed had already visited the Lake Eildon region 3 or more times in the past 12 months. This repeat visitor market can be considered the Habitual market, who regularly visit the Lake Eildon region and have fairly fixed visitation patterns and habits.

¹ High Country figures are based on official High Country Regional Tourism Summary data, YE Jun 2019. As the Mansfield and Murrindindi region is not an official tourism regions, expenditure is calculated using Tourism Research Australia's

VISITOR SPEND

	\$153* Average Spend Per Visitor		\$124 Average Spend Per Camping/Caravan Visitor
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Source: Urban Enterprise, 2019. * Does not include houseboat and holiday home visitors.

Existing visitors to the Lake Eildon region are low-yield, with an average spend of \$153 per visitor per trip, compared to \$340 for visitors to the High Country and \$163 for visitors to the wider Mansfield and Murrindindi region.¹

On average, the top 3 categories of expenditure across all three visitor markets includes:

- Groceries (26%);
- Petrol (21%); and
- Alcohol / drinks (18%).

This accounts for 65% of expenditure for visitor markets to the Lake Eildon region, indicating that these markets spend very little on dining out, entertainment and activities in the region. On average, only 15% of visitor spend is on takeaways and restaurant meals.

It is evident that visitors to the Lake Eildon region do not spend much within the region, due to habitual visitation trends, a preference for self-catering, as well as very limited tourism product within the region for visitors to spend their money on.

It will be important to increase visitor spend within existing markets, as well as focusing on attracting new, higher-yield visitor markets to the Lake Eildon region.

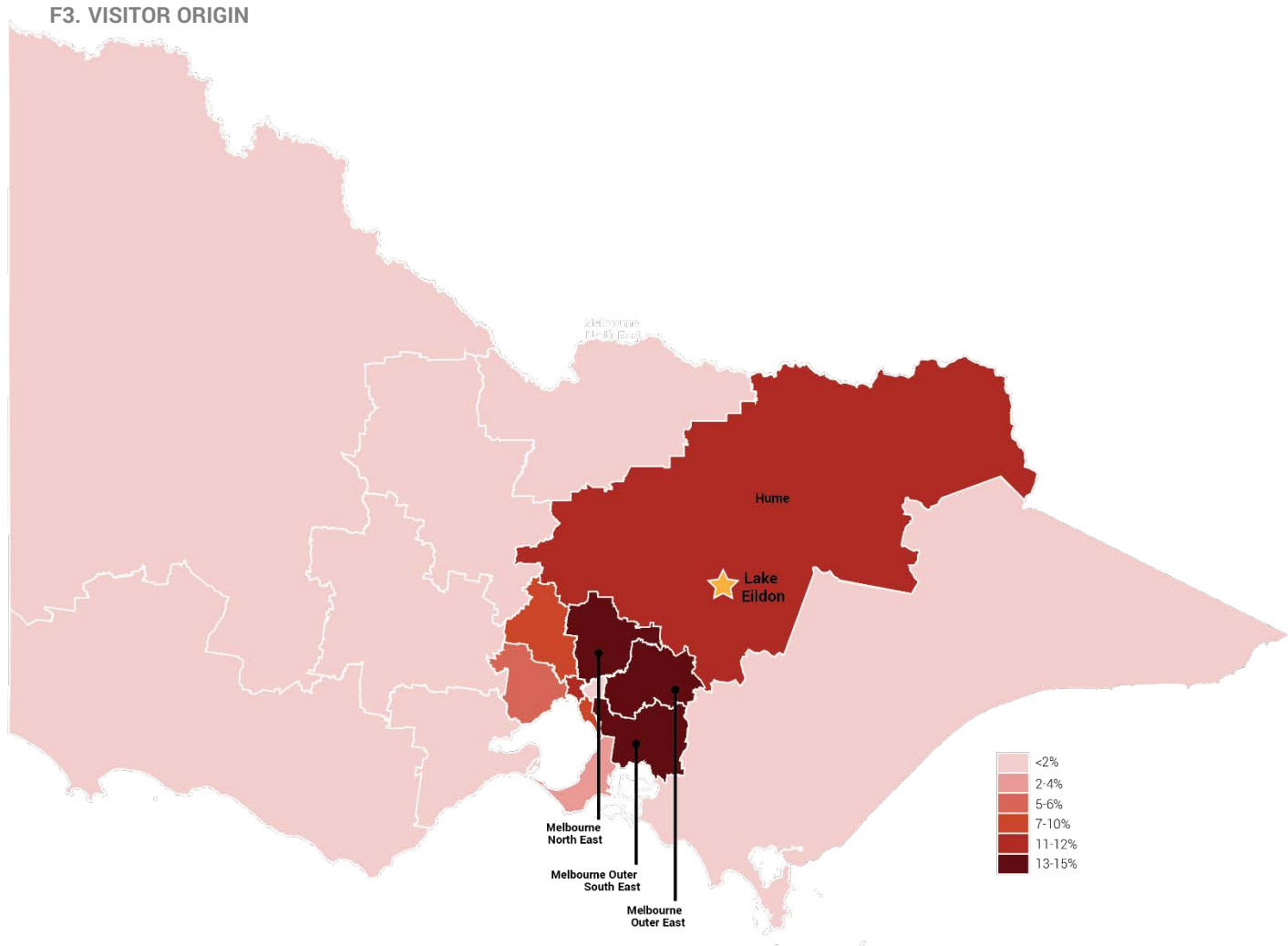
NVS and IVS data, YE De 2018. This provides an estimate only, as it is calculated at the regional level and therefore cannot be compared with PAVE data.

VISITOR ORIGIN

Figure F3 shows the origin of visitors to the Lake Eildon region across Victoria, by Statistical Area 4 (SA4) region.

41% of visitors to the Lake Eildon region are from Eastern Melbourne. This includes Melbourne's North East, South East and Outer East regions. Approximately 11% of visitors are travelling from within the Hume region.

Interestingly, 11% of visitors are from Melbourne's inner region.







Source: Urban Enterprise, 2019.

3.3.2. OVERNIGHT VISITOR MARKETS

OVERNIGHT VISITORS

There were 775,674 overnight visitors to the Lake Eildon region, with overnight visitation primarily driven by caravan and camping visitors (48%), including caravan visitors with annual sites.

This is followed by visitors staying in commercial accommodation (30%) and visitors staying in holiday homes (17%). The houseboat sector accounts for 5% of visitors to the Lake Eildon region.


Visitors By Accommodation		Lake Eildon Region
	Holiday Homes*	134,570
	Houseboats	39,516
	Commercial Accommodation**	230,373
	Camping & Caravan Parks	371,214
Total Visitors		775,674

Source: Urban Enterprise, PAVE Model, 2019.

* Does not include self-contained properties listed on Airbnb.

** Includes traditional commercial accommodation, cabin accommodation and Airbnb accommodation.


CAMPING AND CARAVAN VISITORS

	Camping & Caravan Parks	371,214
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Camping and Caravan visitors accounted for 371,214 visitors to the Lake Eildon region in 2018, with the total nights spent by this group accounting for 1,330,711 visitor nights (51%). Generally, these visitors had a longer length of stay than all other visitor types, as well as accounting for 48% of the overnight visitor market.

The average spend for caravan/camping visitors in the Lake Eildon region is \$124 pp per trip, which is significantly lower than the already low average visitor spend to the region (\$153* pp). This is influenced by the limited amount spent on accommodation, if any, and the tendency for this market to self-cater and bring in most of their supplies from Melbourne.

COMMERCIAL ACCOMMODATION VISITORS

	Commercial Accommodation**	230,373
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There were 230,373 commercial accommodation visitors to the Lake Eildon region. Commercial accommodation visitors are skewed towards the Mansfield Shire side of the Lake Eildon region, driven by a greater proportion of land surrounding the Lake in Mansfield Shire.

Commercial accommodation also includes casual visitors to cabins within caravan parks, which drives a significant portion of this visitation. There is very limited commercial accommodation within the Lake Eildon region that is above 3 stars, therefore most of these commercial accommodation visitors are staying in either motels/motor inns, or rented self-contained properties.

HOLIDAY HOME VISITORS

	2,209 Holiday Homes	1,712 Mansfield Side 497 Murrindindi Side
	134,570 Holiday Home Visitors	497,909 Holiday Home Visitor Nights

The Lake Eildon region has 2,209 holiday homes that are used for private holiday home use. This includes 1,712 on the Mansfield side of the Lake and 497 on the Murrindindi side of the Lake. The Mansfield side of the Lake has much larger tracts of private land and small settlements that support the holiday home sector, compared with Murrindindi, where most of the holiday homes are located in Eildon township.


Bonnie Doon has the largest supply of holiday homes 570, followed by Eildon, 429. Other key nodes of holiday homes include Howes Creek and Goughs Bay.

The Lake Eildon region attracts 134,570 holiday home visitors annually, with Bonnie Doon attracting the largest proportion of holiday home visitors (34,724), followed by Eildon (26,134).

As expected with a water-based attraction such as Lake Eildon, holiday home owner visitation is seasonal and skewed to the warmer months between October-March. An average of 57% of annual visitation occurs during these warmer months.

Most holiday home owners reported natural features of the area as the key motivation for purchasing their holiday home, including proximity to the Lake (21%), natural beauty of the area (18%) and tranquillity of the location (10%).

HOUSEBOAT VISITORS

	722 Houseboats	703 private licences 19 commercial licences
	39,516 Houseboat Visitors	162,017 Houseboat Visitor Nights

Lake Eildon has the largest fleet of houseboats in Victoria, with 722 registered boats. Houseboats are located at Darlingford Waters, Jerusalem Creek, Lake Eildon Marina and Lake Eildon Boat Club. 703 of the 722 houseboats are privately licenced, with only 19 commercial licences.

There were 39,516 visitors to houseboats in 2018, who spent a total of 162,017 nights in the region in 2018.

The permanent mooring for houseboats is on the Murrindindi side of the Lake. The marinas are located around Eildon Township, as the Lake is at its deepest in this location and is most likely to provide year round mooring capability.

Key purchasing motivations for houseboat owners include the natural beauty of the area (21%) and the Lake (19%). Houseboat use is quite seasonal, attracting 68% of visitors to the Lake Eildon region over the warmer months between October-March.

On average, houseboats have been owned for a significant proportion of time, with 70% of houseboats having been owned for 6 or more years. However, there remains significant interest in the houseboat market, as there have been 40 new houseboat builds between 2013-18.

3.4. ECONOMIC IMPACT OF TOURISM INDUSTRY

This section provides an economic impact assessment of tourism and recreation within the Lake Eildon region. The economic impact modelling in this section draws on an extensive amount of primary research undertaken for the Activating Lake Eildon project. It includes primary research surveys of visitors, holiday home owners and houseboat owners.

The economic impact modelling includes:

- Economic impact generated from visitor expenditure;
- Economic impact generated from capital investment and maintenance spend on houseboats; and
- Economic impact generated from capital investment and maintenance spend on holiday homes.

Economic impact modelling has been generated for the Hume region and is based on the direct spend on the above items. Using input-output methodology, indirect expenditure is calculated for the Hume region and allows an estimate of Output and Jobs across the region.

3.4.1. TOTAL ECONOMIC IMPACT

The total economic impact of tourism and recreation within the Lake Eildon region is estimated at \$486 million in output and 2548 jobs in the Hume region. This accounts for Lake Eildon region visitor expenditure, holiday home owners expenditure and houseboat owners expenditure within Mansfield and Murrindindi Shires.

T3. TOTAL ECONOMIC IMPACT OF TOURISM AND RECREATION

	Output	Jobs
Visitor Spend	\$350,709,131	1,838
Holiday Home Spend	\$97,312,943	510
Houseboat Spend	\$38,103,954	200
Total	\$486,126,028	2,548

Source: Urban Enterprise, Economic Impact Model, 2019.

3.4.2. MANSFIELD AND MURRINDINDI

Table T4 and Table T5 provide an outline of the economic impact of tourism and recreation within the Lake Eildon region for Mansfield and Murrindindi Shires.

The economic impact of tourism and recreation derived from the Mansfield side of Lake Eildon is \$275 million in Output and 1,421 jobs.

The economic impact of tourism and recreation derived from the Murrindindi side of Lake Eildon is \$211 million in Output and 1,108 jobs.

T4. MANSFIELD SIDE - ECONOMIC IMPACT OF TOURISM AND RECREATION

	Direct	Indirect	Total
Visitor Spend	\$73,874,917	\$125,587,358	\$199,462,275
Jobs	387	658	1,046
Holiday Home Spend	\$27,932,827	\$47,485,806	\$75,418,632
Jobs	146	249	395
Total Spend	\$101,807,774	\$173,073,164	\$274,880,907
Total Jobs	403	907	1421

Source: Urban Enterprise, Economic Impact Model, 2019.

T5. MURRINDINDI SIDE - ECONOMIC IMPACT OF TOURISM AND RECREATION

	Direct	Indirect	Total
Visitor Spend (Output)	\$56,017,308	\$95,229,423	\$151,246,731
Jobs	294	499	793
Holiday Home Spend (Output)	\$8,109,004	\$13,785,307	\$21,894,311
Jobs	43	72	115
Houseboat Spend (Output)	\$14,112,575	\$23,991,378	\$38,103,954
Jobs	74	126	200
Total (Output)	\$78,238,887	\$133,006,108	\$211,244,996
Total Jobs	411	697	1,108

Source: Urban Enterprise, Economic Impact Model, 2019.

3.5. TARGET MARKETS

Key target markets for Victoria's North East region include Lifestyle Leaders (40% of current visitors) and Habituals (28% of current visitors).

These visitor markets are also the key target markets for the Lake Eildon region, which is currently attracting mainly low-yield Habituals who tend to visit only in peak periods, and very low levels of Lifestyle Leaders.

As Lifestyle Leaders are higher yielding visitors who are interested in a range of attractions and experiences, it will be important to develop a range of high-quality experiences for this market that will inspire them to visit the Lake Eildon region. This includes development of nature-based experiences, family friendly product and experiences, greater retail and food and dining experiences, as well as higher quality accommodation.

HABITUAL VISITORS

These are low-yielding visitors to the Lake Eildon region, who are mainly drawn to camping and caravanning in the area and undertaking activities such as hunting, 4WD driving, and hiking, or are holiday home owners who do not spend on visitor accommodation.

This market is largely self-sustaining and self-caters, with supplies generally purchased in Melbourne and brought to the area, or purchased in Alexandra and Mansfield townships. Additionally, there are very few spend opportunities for these visitors in the region, with little retail, low levels of commercial accommodation and very few commercial tourism operators.

Holiday home and houseboat visitors, who were previously detailed, are considered a part of this market, as their visitation patterns are largely fixed and they are not as easily influenced to try new experiences. Although it will be important to develop more experiences from these markets to extract greater yield, it is also important to attract more of the Lifestyle Leader market.

LIFESTYLE LEADERS

The 'Lifestyle Leaders' market, developed and targeted by Visit Victoria, is based on a mindset, are found in all regions, ages and lifecycle groups and represent approximately a third of the Australian population aged 18+.

Lifestyle Leaders are educated, professional and progressive individuals who enjoy seeking out new information and being the first to try new products. They have a higher level of discretionary expenditure than the general population so they can afford to indulge more often in travel, with a particular desire to escape city life and embrace nature/outdoors and new discoveries. Compared with the average Australian, Lifestyle Leaders:

- Take a greater number of leisure trips per year (4.2 trips compared to 3.9); and
- Spend more on travelling per year (\$4,058 on average compared to \$3,205)

The Lifestyle Leaders market segmentation model also incorporates four categories of target markets specific to the types of experiences sought within the Lifestyle Leaders market, as outlined below.

- **Inspired By Nature (14% of pop. 18+).** Regularly escape for weekends and like to get active to varied degrees, (e.g. hiking, cycling, shopping & dining)
- **Creative Opinion Leaders (6% of pop. 18+).** Involved in cultural and creative pursuits, & open to risks, new experiences & new ideas
- **Food & Wine Lifestylers (13% of pop. 18+).** Like to learn the characters and stories behind the food and wine from the winemaker or chef.
- **Enriched Wellbeing (7% of pop. 18+).** Progressive, educated and professional individuals who seek luxurious breaks.

Key market segments for the Lake Eildon region to target will be the Food and Wine Lifestylers and Inspired By Nature markets. Integral to attracting this market to the region will be the delivery of projects aligned to their wants and needs, including high-quality accommodation and food and beverage, nature-based attractions and activities, as well as other attractions and activities.

Attracting greater numbers of Lifestyle Leaders will help to increase visitor yield across the region, and decrease seasonality impacts across the year.

4. PRODUCT SUPPLY AND OPPORTUNITIES

4.1. INTRODUCTION

This following provides an overview of the tourism product strengths, weaknesses and gaps for the Lake Eildon region, which is based on a comprehensive audit of relevant product, activities and experiences available to visitors.

This information from this section is used to recognise key target markets and inform priority projects and product opportunities to stimulate tourism growth. The product and experiences examined in this section are categorised into *primary* and *secondary* strengths, and *gaps/opportunities for product development*, as follows:

- **Primary** strengths refer to product that is well-established, synonymous with Lake Eildon and define the region's competitive advantage. Primary strengths include drawcard attractions, experiences and activities.
- **Secondary** strengths refer to tourism product that has a smaller presence throughout the region but provides an important complementary offering for visitors. Secondary product typically requires further developments and improvements (in terms of quality and awareness).
- **Gaps/Opportunities for Product Development** refer to tourism product that is either non-existent, or limited in the region, but has the opportunity to develop over time.

4.2. KEY FINDINGS

The Lake Eildon region is primarily a nature-based destination, with key strengths in both water-based and land-based natural assets and associated activities. Key natural assets include Lake Eildon, numerous rivers, and Lake Eildon National Park. There are also a number of surrounding natural assets, including Cathedral Ranges State Park, Mount Buller and Lake Mountain, which drive visitation to the wider region and can be leveraged to encourage greater visitation to the Lake Eildon region.

Key strengths in the Lake Eildon region include waterways (Lake/rivers), fishing, recreational boating, other water-based activities (e.g. kayaking, jet skiing), outdoor adventure activities (e.g. hunting, four wheel driving), and camping.

Although these are key strengths of the region, they are difficult to access for casual visitors who do not own the required equipment and facilities, as there are limited opportunities to hire equipment or undertake tours. There is also a lack of consolidated information available online to inform visitors to the region of tourism and recreation activities and experiences available to them, which can deter other visitor markets (i.e. not Habitual visitors) from visiting or staying in the region.

Although Lake Eildon has popular-nature based product, water-based experiences and a strong events calendar, it lacks the basic supporting tourism product that drives visitors and entices them to stay in the region. Critical gaps in the product mix of the region include contemporary commercial accommodation, quality food and beverage establishments, and family-friendly activities.

Strengthening the primary and secondary nature-based assets of the Lake Eildon region, as well as building on identified opportunities, will be key to the development of the region as a high quality nature-based destination.

4.3. CURRENT VISITOR MOTIVATIONS

It is important to assess the purpose of travel for visitors to the Lake Eildon region, as well as activities currently undertaken, in order to understand market wants and needs, and thus the flow on areas of opportunity for product development.

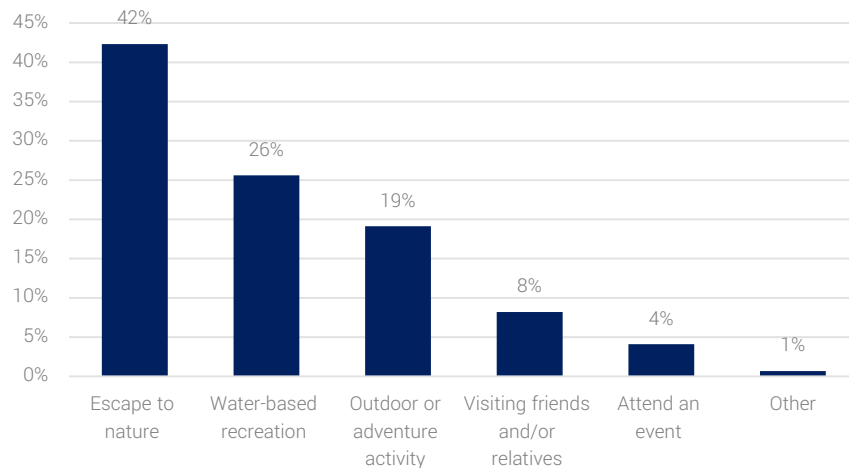
The following analysis of purpose of visit and activities undertaken by visitors was derived from primary research during Stage 1 of the Activating Lake Eildon project.

PURPOSE OF VISIT

The majority of visitors to the region (87%) were visiting for nature-related purposes. This includes escape to nature (42%), water-based recreation (26%) and outdoor or adventure activity (19%).

Only a small number of visitors were visiting friends and/or relatives. This indicates a need to increase the number of complementary visitor experiences for the nature-related market, such as eco-tourism and farmgate experiences.

F4. PURPOSE OF VISIT, INTERCEPT SURVEY VISITORS



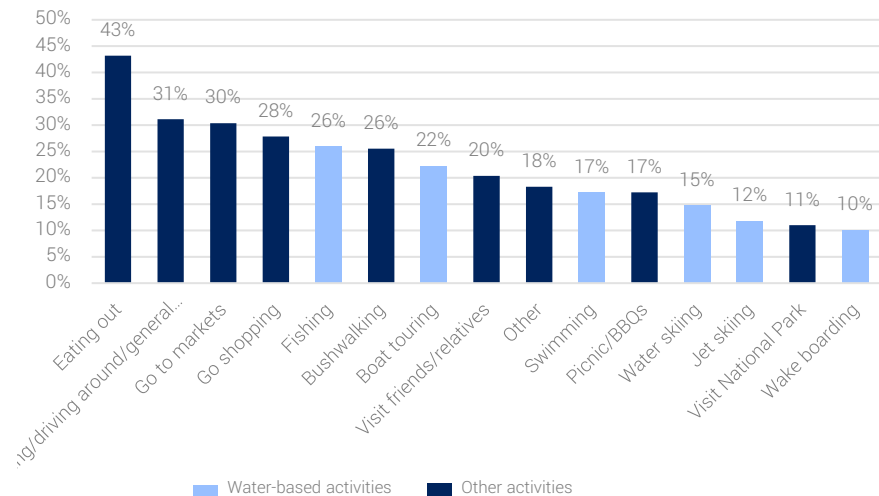
Source: Urban Enterprise, Visitor Intercept Survey, 2019.

ACTIVITIES

Top activities engaged in are eating out (43%), walking/driving around/general sightseeing, (31%), visiting markets (31%) and go shopping (28%). This indicates that a significant proportion of the visitor market is not engaging with many high yield visitor activities. This is likely due to the fact that a portion of the market are habitual visitors who will visit regardless of the tourism offering, as well as due to the lack of tourism offering for those visitors who would otherwise engage in tourism activities.

The water-based activities most engaged in by visitors is fishing (26%) and boat touring (22%). Interestingly, there are not a high proportion of visitors undertaking water-based activities. This indicates that a significant proportion of the visitor market may be wanting to visit the Lake Eildon region for the natural beauty and scenery of the Lake, rather than the activities available.

F5. VISITOR ACTIVITIES



Source: Urban Enterprise, Visitor Intercept Survey, Houseboat Survey, Holiday Home Survey, 2019.

*These survey results have been aggregated across all 3 surveys to provide a larger sample size.

4.4. PRODUCT MATRIX

The Lake Eildon region is primarily a nature-based destination, with key strengths in both water-based and land-based natural assets and associated activities. Key natural assets include Lake Eildon, numerous rivers, and Lake Eildon National Park.

There are major product gaps in the Lake Eildon region at present, including quality food and beverage experiences, contemporary commercial accommodation, family-friendly activities and Indigenous cultural touring. Supporting and promoting investment in these identified areas of product development opportunity will help to deliver a well-rounded tourism experience for visitors to Lake Eildon, and encourage repeat visitation.

There are key access issues for many of the products and experiences that are considered to be strengths of the region. Many casual visitors, including the high yield Lifestyle Leader market, are unable to access many of the tourism products within the region, such as recreational boating, water-based activities (e.g. jet skiing) or houseboats due to the lack of hiring or touring services around Lake Eildon.

Further to this, many boat clubs are also privately owned with member-only access, which can lock visitors out of boating, food and beverage and nature-based experiences at these locations.

A lack of suitable accommodation often deters visitors from attending events or undertaking certain activities in the region, due to a lack of commercial accommodation with a rating of 3 stars or above within the region.

It will be important to leverage primary and secondary strengths to build a visitor destination that is appealing to both existing markets, but also the target Lifestyle Leader market.

There are many critical gaps in the product offer that need consideration in this masterplan. This includes quality food and beverage, commercial accommodation, family-friendly activities and Indigenous cultural touring.

T6. PRODUCT MATRIX, LAKE EILDON REGION

	Product Type
Primary Strengths	Waterways (Lake/Rivers)
	Significant parks and waterways
	Fishing
	Recreational boating
	Outdoor adventure activities
	Hunting
	Other water-based activities
	Outdoor education
Secondary Strengths	Camping
	Events
	Walking
	Cycling
Gaps/Opportunities for Product Development	Houseboats
	Food and beverage
	Commercial accommodation
	Family-friendly activities
	Indigenous cultural touring

4.4.1. WATERWAYS (LAKE EILDON AND RIVERS)

Lake Eildon is the key waterway in the region, with numerous adjoining rivers and streams. These include the Goulburn, Howqua, Jamieson, Big and Delatite Rivers. These rivers are popular fishing and riverside camping destinations, however largely unsuitable to swimming.

The Lake Eildon pondage is a key asset to Eildon township, and is a popular fishing and water-side recreation location. Camping is restricted along the pondage, with visitors only able to camp at commercial caravan parks.

There are a number of key tourism related issues associated with waterways at present:

- Lack of suitable locations for swimmers to access the water, unless they are on a boat or houseboat;
- Limited access to fishing locations along rivers due to private land ownership;
- Rising water temperatures due to climate change impacts on sustainability of fish populations;
- Difficulties accessing the water for boats and houseboats due to lack of suitable boat ramp facilities;
- Limited locations where recreational boats and other water-based activities (e.g. kayaks, jet skis, wakeboards) can be hired.

One of the commitments in the 2019-2022 Target One Million Phase 2 is to mandate access for fishing and camping through opening up hundreds of kilometres of crown land river frontages.

4.4.2. SIGNIFICANT PARKS AND LANDSCAPES

Lake Eildon is primarily a nature-based location, with the views and vistas of the region being a major drawcard for visitors to the region, with the Lake often being a backdrop for visitors.

There are a range of significant natural assets, both within the Lake Eildon region and just outside the Lake, which are outlined below.

LAKE EILDON NATIONAL PARK

Situated on the shores of Lake Eildon, Lake Eildon National Park protects 27,750 ha of rugged hills with open woodlands through to dense forest. The park's vegetation is generally dry, open eucalypt forest with areas of riparian forest and montane forest. Main eucalypt species are stringybarks, peppermints, Red Box and Candlebark with areas of Mountain Ash and Blue Gum.

Lake Eildon National Park is split into the following four visitor experience areas: Fraser, Jerusalem, Jamieson and Enterprise Blocks.

Visitors can enjoy bushwalking, boating and fishing or try the more adventurous pursuits of water skiing and mountain bike riding. Camping is permitted in the National Park at designated campsites.

DELATITE ARM RESERVE

The Delatite Arm Reserve is situated along the shores of Lake Eildon and is adjacent to bushland, pine plantation and revegetated forest areas. This area is managed by DELWP and there are numerous free camping sites above the high water line of Lake Eildon, which are largely unregulated and unrestricted. This area is a popular with campers, who undertake four-wheel driving, motorbiking, mountain biking, fishing and water sports.

LOOKOUTS

There are a number of scenic lookouts with impressive views of Lake Eildon, such as Mount Pinniger, Picnic Point at Goughs Bay, and Skyline Road (Eildon). Although these locations have impressive views of the Lake, there is very little infrastructure and amenity at the lookout points to entice visitors to stop.

RUBICON STATE FOREST AND SNOBS CREEK

The Rubicon State Forest is found partially within the region to the South of the Goulburn Valley Highway, which includes the Snobs Creek tourism precinct, Rubicon Valley Historic Area and Mount Torbreck.

Snobs Creek Falls is situated in the foothills of Rubicon State forest. The pristine waters of Snobs Creek are an important supply to the Snobs Creek Fish Hatchery six kilometres below.

F6. SNOBS CREEK FALLS



WILDLIFE

A range of native wildlife can be found in the Lake Eildon region, particularly within the Lake Eildon National Park. This includes grey kangaroos, black-tailed wallabies, wombats, and significant birdlife, including wedge-tailed eagles.

SURROUNDING NATURAL ASSETS

There are a range of natural assets just outside of the Lake Eildon region that draw in significant visitor numbers to both Mansfield and Murrindindi Shires. There is potential for the Lake Eildon region to capitalise on existing visitors to these natural assets, through marketing and branding of experiences within the region, as well as development of attractive new tourism product.

The key assets are outlined below.

- **Mount Buller And Alpine National Park.** Mount Buller Alpine Resort and Alpine National Park are key drivers for holiday home ownership and overnight stays in

the Mansfield Shire side of the Lake, particularly in Bonnie Doon and Goughs Bay.

- **Cathedral Range State Park, Taggerty.** Cathedral Ranges State Park is a major driver of visitation to Murrindindi Shire, with a range of multi-level walking hikes and picturesque look out points. The park is only 30 minutes from Eildon township, therefore there is opportunity to leverage existing visitors to the Cathedral Ranges and to attract them to visiting the Lake Eildon region.
 - Cathedral Ranges is also a significant creation story site for the Taungurung mob, therefore there is strong potential to link development of Indigenous cultural touring product with the State Park.
- **Mount Torbreck.** At 1516 metres high, is a rocky mountain half way between Marysville and Eildon. Mount Torbreck is a little-known natural asset in the region, which receives snow in the winter time and is a popular hiking destination in summer.
- **Lake Mountain.** Nearby to Marysville in the South of Murrindindi Shire, Lake Mountain is a popular driver of visitation to the region in both winter and summer seasons.
- **Big River State Forest.** Just outside the region, to the south of the Lake Eildon National Park Jamieson Block, is the Big River State Forest. This forest is managed by DELWP and is popular for camping and outdoor recreation activities, with a number of walking and four-wheel driving tracks. Access to the Big River State Forest is generally through either Eildon or Jamieson, therefore there is opportunity to leverage these visitors.
- **Great Forest National Park.** The Great Forest National Park proposes that Victorians create and add a new 355,000 hectares of protected forests to the existing 170,000 hectares of parks and protected areas in the Central Highlands of Victoria. In relation to Lake Eildon, this covers all existing National Park and aims to protect all state forest and natural landscapes to the south of the Lake.
 - With the State Government commitment to phase out logging across Victoria by 2030, protecting and enhancing our state forests will become particularly important.

4.4.3. FISHING

Fishing is an important tourism experience within the Lake Eildon region, which is the highest reported water-based activity undertaken by visitors to the region in 2018 at 26%.

Lake Eildon is the Victorian Fisheries Authorities largest fish stocking lake in Victoria, and is particularly well-regarded for Murray Cod, Trout Cod and Macquarie perch native fishing. Lake Eildon is best regarded for trout fishing in winter and native fishing in summer, making it a relatively steady activity year-round. Delatite, Jamieson, Howqua and Goulburn rivers also offer some of the best fly fishing in Australia.

The Victorian Fisheries Authority (VFA) is the statutory authority for fishing in Victoria, responsible for promoting and increasing fishing for recreational, commercial and aquaculture purposes, as well as maintaining sustainability of the industry and ensuring fish don't become extinct. The Victorian Fisheries Authority recorded 8,796 fishing visitors in only a month and a half (1st September - 17th October) to the Murrindindi region (non-unique) as a result of VFA initiatives, including the Goulburn Fishing Festival and post-festival trout stocking.²

Fishing equipment hire is available from the Eildon Trout Farm, which provides trout fishing and has equipment hire available, as well as at Jerusalem Creek Marina. Fishing guiding is available with Riverdowns Fly Fishing Guiding and Instruction, which has 600 metres of private frontage to the historic Howqua River.

There are a number of key fishing events at Lake Eildon, including, the Big Fish Challenge, Lake Eildon Boating and Fishing Show, and Goulburn Fishing Festival. These are detailed further in Section 6.13 Events.

The Goulburn River, between Thornton and Eildon, is the most suitable location for trout fishing, with ideal temperatures for trout. Much of this land is private with limited river access, however the river frontages are crown land. Therefore there is opportunity to open up more of this land for fishing access, with opportunity to provide day visitor facilities and promote development of nature-based accommodation and camping alongside the river.

² Victorian Fisheries Authority, Economic Benefit Report, 2018.

With decreasing Murray Cod populations across the state, and increasing stocking in Lake Eildon as well as high interest in Murray Cod fishing, there is significant opportunity to develop Lake Eildon into the premier Murray Cod fishing destination. There is particular opportunity to attract greater numbers of interstate fishing visitors and international fishing markets to Lake Eildon. There is potential to further attract Asian markets, who have an appetite for fishing around Lake Eildon.

4.4.4. HOUSEBOATS

Lake Eildon is the only inland waterway in Victoria, other than the Murray River, with authorised use of houseboats. Lake Eildon has the largest fleet of houseboats in Victoria, with 722 registered boats. This is comprised of 703 privately licenced houseboats and only 19 commercial licences.

Houseboats are located at Darlingford Waters, Jerusalem Creek, Lake Eildon Marina and Lake Eildon Boat Club. Lake Eildon Boat Club and Darlingford Waters are members-only marinas, whereas Lake Eildon Marina and Jerusalem Creek Marina and Holiday Park are both public access marinas.

Private houseboats are required to have a blackwater treatment system fitted to the satisfaction of the relevant authority, but do not require a greywater treatment system (as advised by DELWP, effective October 2017). Commercial houseboats are required to adhere to much more stringent regulations, in line with Australian Maritime Safety Authority Regulations, which has historically created difficulties in expanding the commercial houseboat fleet.

HOUSEBOAT LICENCES

Houseboat licenses are issued annually by GMW. The payment of the annual houseboat licence fee constitutes an application to GMW for a one year licence to operate a houseboat on Lake Eildon.

The utilisation rate of existing houseboats and the annual spend on new houseboats is limited by current houseboat regulation, which does not allow leasing of private houseboats in the same way a holiday home can be rented on the AirBnb market.

Furthermore, there is only a limited number of houseboat licences available, as determined annually by Goulburn-Murray Water. The current private houseboat fleet size is constrained by a range of factors, including:

- Lack of greywater treatment systems on boats (legislation review currently underway).
- Capacity of the blackwater systems (Point Worner & Jerusalem Creek along with Goulburn Valley Water's town system),
- Infrastructure around the Lake that support houseboats (e.g. roads and boat ramps); and
- The quantity of houseboats the Lake can support at all water levels.

GMW continually reviews the number of houseboats permitted on the Lake, and although the number of private houseboats is considered to be substantial at present, there remains opportunity for further investigation over time.

EBC supports Goulburn Murray Water (GMW) in developing a strategy for the release of new houseboat licences, having regard for existing harbour capacity/capabilities and suitable marina upgrades to accommodate any increase in new houseboat licences.

Accepting that at lower water levels the capacity to harbour houseboats does present a number of challenges, which has caused the industry to respond and EBC has committed to an improvement strategy of its harbour facilities to ensure it is in a position to maximises future expansion opportunities.

FACILITY UPGRADES & POTENTIAL OPPORTUNITIES

Smaller existing slipways, progressively constructed over the past 70 years, are no longer adequate for the launching of modern, larger houseboats. In response to an urgent need, Eildon Boat Club (EBC) is currently completing the construction of a modern, larger slipway. The slipway will cater for larger, new category 6 houseboats

to be slipped, future proofing all boat slipping requirements for both EBC members and the broader boating community.

A substantial boost in this part of the Lake Eildon region economy could be received through:

- Reform to houseboat regulations to allow for a greater number of boats on the Lake. There is opportunity for this to be further investigated further by Goulburn Murray Water;
- Opportunity for change in the Water Act that can allow GMW to charge for licences and contribute the revenue into a consolidated funding pool (these laws have been implemented successfully by the South Australia Houseboat Industry); and
- Better utilisation of existing houseboat fleet, through joint-ownership ventures whereby a body corporate can be set up to manage one houseboat owned by a number of families.

4.4.5. RECREATIONAL BOATING

Recreational boating is a key strength of the region, undertaken by houseboat owners, holiday home owners, residents and visitors alike. Recreational boating includes etc.

Boat hire is only available from the following providers and locations:

- Northern Waters Boat Tours, Jerusalem Creek.
- Lakeview Boat Hire, Eildon.

Although recreational boating is a major strength and driver for visitation to Lake Eildon, it is very difficult to access without a privately owned boat. There are very limited opportunities to hire a boat for casual recreational use at Lake Eildon. Boat tours are only available from Jerusalem Creek Marina through BMS Tours. This is a critical gap for the region, which could be expanded on in order to access a greater number of visitors.

4.4.6. OTHER WATER-BASED ACTIVITIES

There are a significant number of other water-based activities that are popular on Lake Eildon. This includes wakeboarding, water skiing, jet skiing, kayaking and flyboarding. The main purpose of trip for boating visitors travelling to Lake Eildon was water skiing/wakeboarding/knee boarding etc (62%), followed by fishing (23%), and touring/cruising (15%)³. This highlights the importance of other water-based activities to the Lake Eildon visitor economy.

As with recreational boating, there is very limited opportunity to hire and participate in other water-based activities such as those addressed above. Hiring is limited to

- Kayak rental available at Jamieson Caravan Park;
- Wakeboard rental available at Jerusalem Creek Marina & Holiday Park;
- Kayak hire available at Bonnie Doon Lakeside Resort; and
- Kayak and stand up paddle board hire available at Howqua Valley Resort.

There is potential to develop other water-based activities, such as the touring Aquadonuts pictured in Figure F7, which have in-built barbecues facilities.

A key issue for the region is that there is no centralised location for visitors to access detailed information on hiring of water-based facilities. This is an issue that needs to be addressed across the Lake Eildon region.

F7. AQUADONUT, BOAT4HIRE



³ Victorian Boating Behaviour, Transport Safety Victoria, 2015

4.4.7. CAMPING

Camping is a popular activity and form of accommodation for visitors to the Lake Eildon region, many of whom are mostly interested in the rugged and basic camping provided in the Lake Eildon National Park, Delatite Arm Reserve. Informal camping along the numerous rivers and creeks in the region is also popular, with locations such as Running Creek Camping Reserve along the Howqua River, Granny's Flat Campground along the Jamieson River and numerous campsites around Big River,

Camping in the Lake Eildon National Park is limited to the designated paid campgrounds in the Fraser and Jerusalem Blocks. All three campgrounds in the Fraser complex offer flushing toilets, hot showers, drinking water, free gas barbecues, shelters and picnic areas, with wheel-chair accessible toilets and showers at Candlebark and Devil Cove. Jerusalem Creek has eight camping areas. Fireplaces and pit toilets are provided. Bring your own drinking water and firewood.

There are numerous unpaid camping sites located on the Delatite Arm Reserve. Although camping is only permitted within the designated camping areas, it is highly unregulated and often overcrowded during peak periods, with many campers not adhering to regulations.

4.4.8. CYCLING

The Lake Eildon region is particularly well regarded for road cycling, with a number of popular informal routes frequented by cyclists. These include the unsealed Skyline Road, cycling loops from Alexandra to Eildon along the Back Eildon Road, and bushland gravel cycling in National Park and State Forest land.

There is also a growing mountain bike market across the region, with recent investment into the Eildon Mountain Bike Trails and sustained interest in the mountain biking trails in the Delatite Arm Reserve.

Some of the key cycling trails and routes are identified below.

- **Eildon Mountain Bike trails.** Located on Goulburn-Murray Water land north of Eildon township, the Eildon Mountain Bike trails are currently being formalised . There is opportunity to further develop these trails and to deliver a high-class mountain biking facility.
- **Great Victorian Rail Trail.** There are varied attractions along the Rail Trail including museums, Lake Eildon, forests, farmland, large railway bridges, Goulburn River, small villages and larger regional towns .The Great Victorian Rail Trail passes over the Bonnie Doon Bridge crossing the Brankeet Arm of Lake Eildon. The bridge is 385 metres long and provides a great vantage spot to stop and watch activity on the lake. Bonnie Doon Station marks the location of the old railway station along the route.
- **A lap around the Lake.** This is a popular informal cycling route for cycling enthusiasts, with over 500km of cycling around the entirety of Lake Eildon.
- **Delatite Arm Reserve.** A network of forest tracks throughout the Delatite Arm Reserve provide opportunities for trailbiking and mountain biking, and is very popular amongst campers in the Delatite Arm.

There is opportunity to formalise the ‘Lap around the Lake’ cycling route through sealing Skyline Road and making it a complete loop that is marketed to cyclists. There is opportunity for all cycling products in the region to be further enhanced and promoted within Tourism North East’s ‘Ride High Country’ campaign, as well as through further promotion by LakeEildon.com.

4.4.9. WALKING

Walking is a secondary tourism strength of the Lake Eildon region, with a range of walks available to visitors throughout the Lake Eildon region.

Key walking tracks within the Lake Eildon region are detailed in Table T7.

This table highlights that although the majority of walking trails are within the Lake Eildon National Park, these are concentrated mainly in the Fraser Block, with a few walks in the Jerusalem Block, yet no formal walking trails Jamieson and Enterprise (Delatite) blocks.

There are a number of walking tracks and trails within the surrounding areas which drive significant visitation, including walking trails at Mount Torbreck, Mount Buller, Lake Mountain and Cathedral Ranges State Park.

T7. WALKING TRACKS AND EXPERIENCES

Name	Location	Distance (return)	Grade	Description
Pinnacle Walking Track	LENP Jerusalem Block	23km 7 hrs	Moderate	Return hike starting at the Jerusalem Creek Day Visitor Area and heads south west as it follows Jerusalem Creek..
Rocky Peak & The Pinnacle	LENP Jerusalem Block	7.7km 4hrs	Moderate	This hike takes visitors past the little-known peaks, Rocky Peak and The Pinnacle, which have impressive views in all directions. Much of the route is off track, with a steep and rocky descent.
Estate Spur Circuit	LENP Fraser Block	8.6km 2.5 hrs	Easy- Moderate	Start & finish at Lakeside Campground
Coller Bay Walking Trail	LENP Fraser Block	7 km	Easy	This is lake shore trail that links the three main campgrounds in the Fraser Block.
Candlebark Nature Trail	LENP Fraser Block	2km	Easy	
Wallaby Bay Walk	LENP Fraser Block	2.5km 1.5 hrs	Easy	Follow the lake shore on this scenic, shady, gently undulating walk starts at the Wallaby Bay carpark. Either stop at Cooks Point (2.5km, 40 minutes one-way) or School Point (7km, 2 hours one-way).
Cook Point to High Camp	LENP Fraser Block	10.5km 4 hrs	Easy- Moderate	The trail starts at Devils Cove Campground, follows the Keg Spur Track then descends down to Cook Point. From here, the route follows the Wallaby Bay Track past Teal Bay, Wallaby Bay and back to Devils Cove.
Blowhard Summit	LENP Fraser Block	7km 2.5 hrs	Moderate	Start & finish at Wallaby Bay Carpark. This walk follows the lake's edge to Cook Point, up Blowhard Spur to its summit, with a steep descent to the carpark. The summit has views of distant Mt Buller, the lake and the local wildlife.
Perfect Cure Nature Trail	LENP Fraser Block	1.5 km 1 hr	Easy	A short self-guided walk near the picnic and camping ground at Devils Cove. Start & finish at Devils Cove Campground
Howqua River Walk	Howqua River	12.4km	Moderate	The Howqua River Walk follows the river flats to Tobacco Flat, involving around 30 river crossings.
Mitchell's Bridle Trail	Jamieson	24km	Easy- Moderate	The trail follows the Jamieson River, linking Granny's Flat Camping Reserve to Mitchell's Flat. Along the track are two sites of historical significance: the remnants of the Quicksilver mercury mine and dwellings of pioneer Hoskins and Mitchell families at Mitchell's Flat.

Source: Urban Enterprise, desktop research, 2019.

4.4.10. OUTDOOR EDUCATION

The Lake Eildon region has a cluster of outdoor education operators and school camps which are located in the region to access the range of nature based assets on offer.

The Outdoor Education Group is the largest outdoor education operator in Australia. The Outdoor Education Group operates across the region's National and State Parks and reserves and hosts thousands of outdoor education students every year.

Further clustering and growth of the outdoor education role of Lake Eildon should be explored. The importance of nature tourism is supported by evidence from the primary research surveys undertaken.

4.4.11. OUTDOOR ADVENTURE ACTIVITIES

There are a range of other outdoor activities which are popular amongst visitors, including touring, hunting and four wheel driving. These are detailed below.

TOURING

There are a few touring companies operating within the region, however this remains a key gap for the Lake Eildon region. Existing tour providers include:

- **Stockmans Reward Trail Riding.** Horse riding tours for school group rides, one hour rides and pony rides for children. Caters to riders of all skill levels. Equipment Hire including helmets, saddle and riding boots available.
- **Alpine Helicopter Charter.** The Lake Eildon Explorer tour is run by Alpine Helicopter Charter, which takes visitors around the Lake by air.
- **BMS Tours.** Boat tours are only available from Jerusalem Creek Marina through BMS Tours. This is a critical gap for the region, which could be expanded on in order to access a greater number of visitors.

HUNTING

Hunting is a niche but important experience area for visitors to the Lake Eildon region, in particular deer and duck hunting.

Generally, hunting of any type is not permitted at any time within National Parks, however Lake Eildon National Park is one of the few parks where regulated hunting is permitted.

The Game Management Authority authorises hunting in the following areas throughout the Lake Eildon region:

- **Delatite Arm Reserve.** An unloaded shotgun may be carried during the duck season.
- **Lake Eildon National Park:** In certain sections in the south-east of the park, Sambar Deer may be hunted from the first Saturday after Easter, being 14 April, until 30 November 2012. The use of dogs to hunt deer is not permitted in this park. Pest animals and other species must not be hunted in this park.
- **Licensed Crown land.** Generally, game (during the open season) and pest animals (at any time) may be hunted, subject to the permission of the licensee
- **Private land.** Game (only during the open season) and pest animals may be hunted, but only with the permission of the landowner/manager

FOUR WHEEL DRIVING

Four-wheel driving is a popular activity in the Lake Eildon region, particularly throughout the Delatite Arm Reserve (a.k.a 'The Pines'), throughout the Jerusalem and Jamieson Blocks of the Lake Eildon National Park, and within the State Forest to the South of the region.

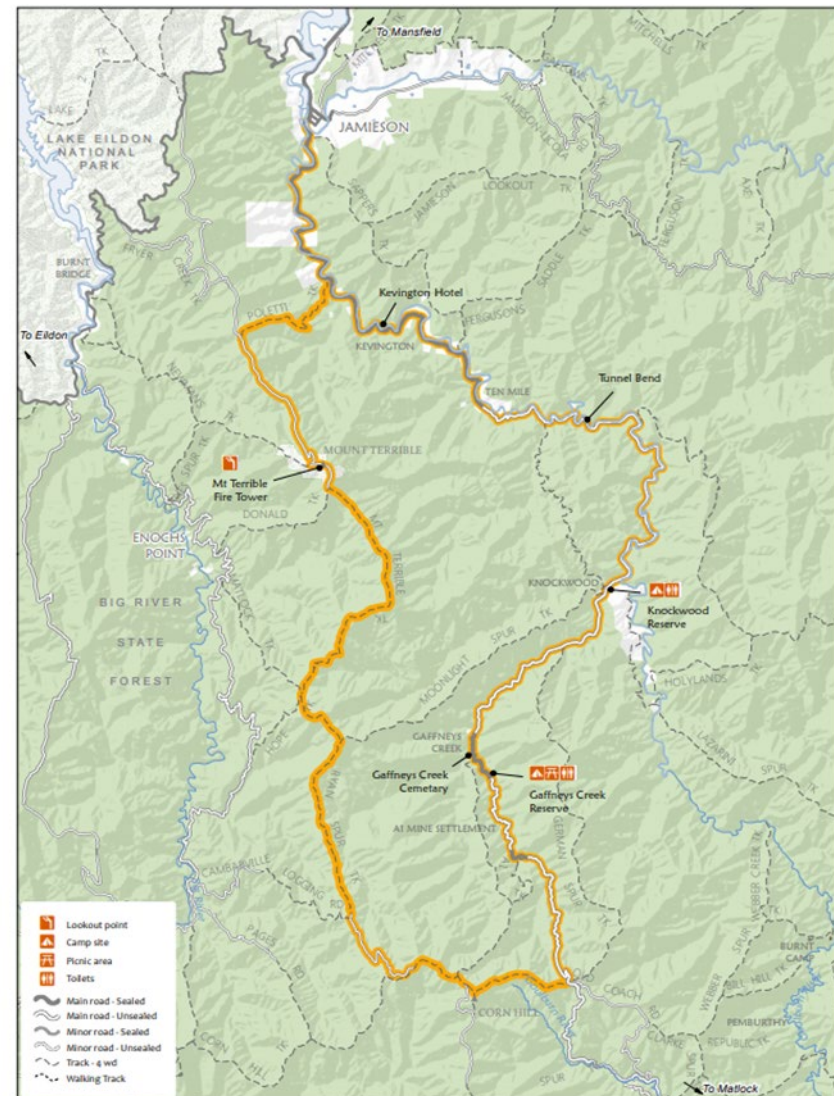
There is seasonal closure of some tracks over winter, from the Thursday after the Queen's Birthday holiday through to the Thursday before Melbourne Cup, to preserve the quality of the roads and for safety. Off-road driving is illegal.

All roads throughout the Delatite Arm Reserve are unsealed, with a number of 4WD and dirt biking tracks.

Figure F8 shows the Upper Goulburn 4WD Touring Route, which starts and ends at the historic township of Jamieson. It travels through State Forest managed by the Department of Environment, Land, Water and Planning (DELWP) and features mountain views and historic sites associated with the gold mining era. The route is approximately 90 km and will take a full day to complete if you wish to explore some of the points of interest along the way.

Parks Victoria have identified significant opportunity to develop parts of the Jerusalem Block into designated four wheel driving, as there are existing four wheel drive trails in this block that will enable further development.

F8. UPPER GOULBURN 4WD TOUR ROUTE, DELWP



Source: DELWP, 2016

4.4.12. EVENTS AND FESTIVALS

There is a strong events and festivals calendar that draws visitors each year and promotes the region, many of which are centred around boating and fishing.

There is opportunity to further expand events in the Lake Eildon region, particularly by developing arts and culture events with a focus on the Lake as a backdrop for these events, and building on other nature-based events

There are a range of high profile events outside the Lake Eildon region which drive significant visitation to each of the Shires, such as the Mansfield High Country Festival, Mansfield Agriculture Show, and Alexandra Truck Ute and Rod Show.

The only event facility in the Lake Eildon region is the Holmesglen facility in Eildon. The centre includes a range of conference and events centre with a capacity of 650 people (cocktail), a dining facility and a combined hotel accommodation facility with 50 rooms. The facility is often at capacity, therefore there is potential to develop another integrated conference and events centre in the region.

Improved branding and marketing of existing events is necessary to elevate the key events to a status of regional importance, and to grow the scale of visitation to these events. Development of supporting food and beverage and quality accommodation product will be key to enhancing the experience for visitors to existing events within the region, and will encourage repeat visitation.

T8. LAKE EILDON REGION EVENTS

Event	Location	Theme	Description
Lake Eildon Boating and Fishing Show	Eildon, Alliance boat ramp	Fishing/ Boating	With a successful first year in October 2019, the Lake Eildon Boating and Fishing Show attracted over 3,500 visitors. The event was run by the Boating Industry Association of Victoria, and included on water demonstrations, test runs for prospective houseboats and recreational boat purchasers, family-friendly activities and food experiences.
Lake Eildon Challenge	Lake Eildon region	Cycling	A long multi-sport challenge, the event starts with a 98km cycle from Mansfield to Eildon, then a 25km paddle from Eildon to Bonnie Doon, and finishes with a 21.1km run from Bonnie Doon back to Mansfield.
The Big Fish Challenge	Eildon Pondage	Fishing	Run on the third week of October, the Eildon Big Fish Challenge is an annual competition to catch the biggest fish.
Goulburn Fishing Festival at Eildon		Fishing	The biggest fishing event of the year, held on the opening weekend of trout season in September.
Lake Eildon Festival	Bonnie Doon & Goughs Bay	Fishing/ Boating/ Other water-based activities	The Lake Eildon Festival is the action packed official opening of the water sport season.
Bonnie Doon Music Festival	Bonnie Doon	Arts/Culture	Annual music festival held at the Bonnie Doon recreation Reserve
Jamieson Autumn Festival	Jamieson	Arts/Culture	Festival activities showcase the diversity of talent among local personalities, and include demonstrations of blacksmithing and bush cooking, workshops in landscape painting and pottery, displays of fly fishing and whip cracking, recitals of bush poetry and street buskers.
Targa Fest High Country	Lake Eildon region, Mansfield, King Valley	Car Racing	A three day car racing event starting and finishing on Mount Buller, touring around Lake Eildon, Mansfield and King Valley.
Eildons Lions Easter Market	Eildon	Arts/Culture	An annual community market attracting approximately 5,000 visitors.

4.4.13. INDIGENOUS, HERITAGE AND CULTURE

TAUNGURUNG

Taungurung Land and Waters Council (TLWC) was registered in 2009 as the Registered Aboriginal Party that represents the interests of the Taungurung people, which covers both the Murrindindi and Mansfield sides of the Lake. There is significant Indigenous heritage that can be found throughout the Lake Eildon National Park, however a large part of the Indigenous history is found within the Lake itself.

A formal agreement was signed in 2018 recognising the Taungurung people as the traditional owners of a large area of central Victoria, executed under the *Traditional Owner Settlement Act 2010*. The State Government will invest \$24 million as part of the agreement, including more than \$16 million to support Taungurung economic and cultural development initiatives, and \$8 million to support the Taungurung Clans Aboriginal Corporation's core costs. An additional \$300,000 a year will be provided to support the Taungurung Clans Aboriginal Corporation to partner in natural resource management.

As a result of this agreement, a joint-management plan will need to be developed with Taungurung and Parks Victoria in the near future, which will influence the management of Lake Eildon National Park and will outline the opportunities for indigenous experiences within the National Park.

The agreement involves the transfer of nine parks and reserves to the Taungurung as 'Aboriginal Title' and the granting of up to five Crown properties, which the Taungurung may request be transferred to freehold title held by the Taungurung.

Taungurung currently undertake a number of cultural touring and education experiences on an ad hoc basis, when approached by organisations or groups. At present, these experiences are not formalised or open to the public.

There is opportunity to develop a tour throughout the region that links key cultural heritage sites, such as Cathedral Ranges, Lake Eildon National Park, and Lake Eildon itself. This could include facilitated walks to sites, bush tucker experiences, camping with custodians, and on-water touring components.

4.4.14. OTHER HERITAGE AND CULTURE

JAMIESON FORMER GOLD MINING TOWN

Jamieson is a former gold mining town, which started as a supply depot for gold prospectors crossing the rugged High Country to the Jordan Goldfields. The township developed into a supply town with a population of between 3,000 and 4,000, with breweries, hotels, banks, churches and even a courthouse.

Located in the former Jamieson courthouse, the Jamieson Museum takes visitors back to the time of the Australian gold rush. A variety of artefacts and photographs will tell you the story of Jamieson's rise as an iconic gold rush town.

BONNIE DOON

Bonnie Doon is well known for the following two key reasons:

- **'The town that moved'**. Bonnie Doon was relocated to its current siting along the Maroondah Highway in the 1950's, after the construction of Lake Eildon caused flooding around the original town.
- **'The Castle Holiday Home'**. Bonnie Doon is well-regarded for the holiday home house featured in the Australian feature length comedy, 'The Castle', located just across the road from Lake Eildon.

EILDON HISTORY

Eildon township was originally built as a shanty town for workers involved in the construction of the Eldon Dam. During the construction of the dam, approximately 4,000 people were housed in the new township of Eildon. Construction of the town commenced in 1950 and was completed in 1952.

This explains the orientation of the township, as key industrial areas were to the North of Lake Eildon, and therefore the town centre was faced towards the industrial areas and away from the pondage, which would now be considered the more logical orientation for the town centre.

4.4.16. FOOD AND BEVERAGE

There are very few destination restaurant and café establishments in the Lake Eildon region, with key assets in the region including:

- **Bonnie Doon Hotel.** A key establishment along the Maroondah Highway in Bonnie Doon, which has received ongoing investment and upgrades. Key to the hotel's success is the well-appointed courtyard fronting onto the green lakeside, consistent 7 day trade and good quality meals.
- **Jamieson Brewery & Grill.** Recently opened, this is a successful development fronting onto Lake Eildon, at the intersection of Eildon-Jamieson Road and Old Eildon Road.
- Key waterside dining destinations include **Aqua Bar** in Eildon, **Cafe 501 Bar & Grill** at Jerusalem Creek and **Eildon Waters Restaurant & Bar** (members-only access).

These establishments provide leadership in service quality and improved offerings in terms of food and establishment quality.

The remaining dining establishments include small cafes, bakeries and eateries serving mainly locals and passing visitors. These are:

- **Eildon:** Eildon Woodfire Pizza, The Eildon Bakery Café, 19 Main, Check out 7;
- **Jamieson:** Debs Café, Courthouse Hotel;
- **Thornton:** Rubicon Hotel Motel, 4 Ways Café and Dinner, Eildon Waters Restaurant & Bar;
- **Bonnie Doon.** K's Place; and
- **Goughs Bay:** Café at Goughs Bay Caravan Park.

Amongst The Sticks is an events and catering company, hosting private events in its Goughs Bay venue and servicing events throughout the region.

There are a handful of agri-businesses and farmgate experiences in the Lake Eildon region, including:

- **Howes Creek Farm.** Boutique producer of handmade pork sausages and naturally produced smallgoods. All products are available from their farm gate located in Howes Creek, open from Thursday – Sunday 10am to 4pm, with regular sausage-making classes occurring throughout the year.
- **Mount Terrible Wines.** Small scale winery in Jamieson producing Pinot Noir
- **Jamieson Berries.** Small 6 acre farm growing blueberries, boysenberries and raspberries, producing frozen berries, jams, toppings and fruit wines year round.

Agri-business experiences within the Lake Eildon region could be further enhanced to build a farmgate experience for visitors. There is also opportunity to showcase regional produce, particularly trout and other fish, through the development of dining establishments using local produce and providing a unique experience for visitors.

Key issues with the food and beverage offering in the Lake Eildon region include inconsistent service, experience and food quality, inconsistent trading hours and outdated establishments. Many food and dining establishments do not service the peak visitation periods as they are unable to afford to stay open due to seasonality factors, which can result in an unsatisfactory visitor experience and can deter repeat visitation. A lack of critical business mass also makes it unattractive for new businesses to establish themselves and makes it difficult to retain existing businesses

To build the profile of the Lake Eildon region as an attractive destination for visitors, investment in contemporary and quality food and beverage establishments is required. This will help to increase the yield from existing visitor markets, service residents of the region and surrounding towns, as well as attracting new visitor markets.

Key opportunities for food and beverage development include destination dining at key visitor nodes (e.g. Eildon, Bonnie Doon, Goughs Bay) and investment in on-water food and beverage experiences (e.g. Boat Restaurant or Boat Bar).

4.4.17. ACCOMMODATION

SUPPLY OVERVIEW

Accommodation in the region is driven by camping and caravan sites (1,541 sites) and holiday homes (1,253 homes), with a lesser amount of commercial accommodation (1,057 rooms).

Commercial accommodation includes cabins for rent within caravan parks, self-contained houses, apartments, motels, lodges, farmstays and bed and breakfasts. Most of the commercial accommodation can be found within Eildon/Taylor Bay (340 rooms), followed by Bonnie Doon (201 rooms) and Goughs Bay (164 rooms).

There are no motels within the Lake Eildon region, and no self-contained apartment facilities. All of the commercial accommodation is 3.5 stars or less, with very little investment into the existing accommodation stock to appeal to the contemporary visitor market. As a result, the region struggles to attract high-yielding visitor markets who would spend on quality accommodation.

Although the region is dominated by camping and caravan sites, there are very few hot beds within caravan parks, as most sites are annual sites. Annual sites have not been included in this analysis, as they are unavailable to casual visitors. Of the 1,541 camping and caravan sites, over a third of sites are free camping sites in either the Lake Eildon National Park or the DELWP managed Delatite Arm Reserve.

Commercial accommodation is a critical gap for the Lake Eildon region, and is one of the main product areas holding Lake Eildon back from becoming a major tourism destination. Investment in high quality, contemporary visitor accommodation is necessary to elevate the tourism offering of the region, and to attract the Lifestyle Leader market to both visit the region, and extend their day trip into an overnight stay.

T9. ACCOMMODATION ROOMS BY SUBREGION, LAKE EILDON REGION

Subregion	Commercial Guestrooms (Number of rooms)	Camping Sites (number of sites)	Holiday Homes (number of homes)
Bonnie Doon	201	100	570
Howes Creek	37	0	344
Goughs Bay /Mountain Bay	164	25	282
Fraser	0	500*	0
Thornton	87	57	68
Eildon/Taylor Bay	340	321	429
Jamieson	101	62	285
Macs Cove/Howqua	127	126	231
Delatite Plantation	0	350*	0
Lake Eildon region	1,057	1,541	2,209

Source: Urban Enterprise, confirmed through desktop research, site visits and rates data from Mansfield and Murrindindi Shires, 2019.

*Free camping only

5. PRODUCT AND ACCOMMODATION DEMAND ASSESSMENT

5.1. INTRODUCTION

Outlined in this section is an overview of the demand for specific product and accommodation development in the Lake Eildon region, as aligned to target market needs and preferences.

5.2. KEY FINDINGS

The Lake Eildon region is projected to grow by an additional 604,922 visitors by 2030, to reach 1,474,800 visitors. This highlights the need for both private and public sector investment to provide a unique and attractive experience to service these visitors, including investment in key product gaps, infrastructure and visitor services.

With the identified projected growth, there will be a critical need deliver quality contemporary tourism experiences that will assist in attracting the Lifestyle Leader market, as well as delivering projects that will extract greater yield from the Habitual market.

The key strategy for the region will be to grow the Lifestyle Leader market from the current estimated proportion of 20% of visitation (123,992 visitors) to reach 30% of the projected visitor market in 2030 (442,464 visitors). This will involve investment in resort-style, experiential and boutique accommodation, as well as investment in arts and culture, food and beverage, cultural tourism experiences, and formalised nature-based experiences.

Although there are a high number of overnight visitors to the region staying in either commercial accommodation or commercial camping/caravan parks, there are very few 'hot beds' in the region, due to many caravan/camping sites being annual sites that are unable to be rented by casual visitors.

There is a projected accommodation need of 685 rooms by 2025, which highlights the need for investment in new accommodation stock, particularly 4-5 star

accommodation and experiential accommodation that will attract the Lifestyle Leader market.

Respondents to the visitor survey undertaken during Stage 1 of the Activating Lake Eildon project identified a range of improvements needed to the visitor experience across the region. These include the need for an improved dining offer, increase in access to water and improved infrastructure (including boat ramps and roads).

Survey respondents identified the top reasons they would be motivated to travel to the Lake Eildon region outside of peak season, which include events, fishing and activities. These key focus areas highlight the need for investment in tourism product and experiences that focus development away from on-water experiences.

5.3. VISITATION PROJECTIONS

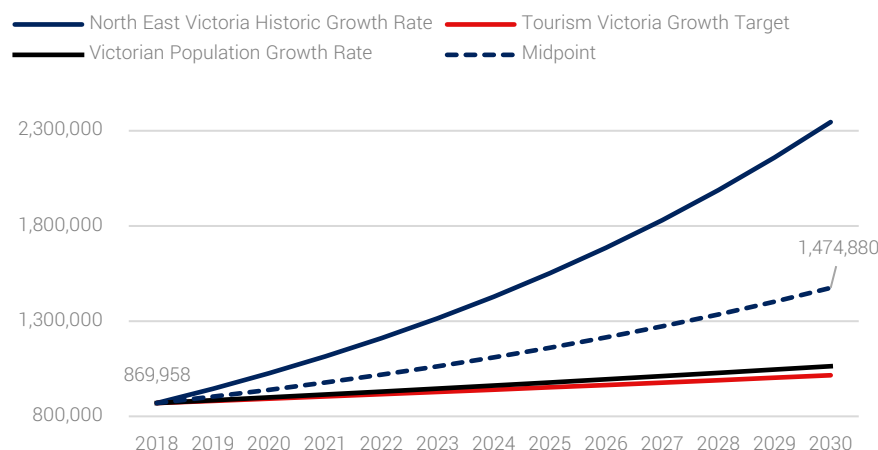
Projected visitation to the Lake Eildon region over the next 10 years is shown in Figure F9 below.

Modelling is based on historic visitation growth rate for the North East region, adopted Tourism Victoria forecasts and the Victorian Population growth rate. All scenario's show that the Lake Eildon region will attract some level of visitation growth over the next 10 years.

Using the adopted midpoint scenario, it is projected that the Lake Eildon region will have a fairly substantial increase in visitation to reach 1,474,800 visitors by 2030.

This represents an additional 604,922 visitors by 2030, reinforcing the need for investment to provide a unique tourism experience for these visitors, as well as a need for infrastructure and visitor services to properly service the growth.

F9. VISITATION PROJECTIONS, LAKE EILDON REGION



Source: Urban Enterprise, projections based on PAVE modelling, Victorian Population Growth Rate, TRA Historic Growth Rate for North East Victoria and Tourism Victoria Growth Rate, 2019.

5.4. TARGET MARKET SEGMENT PREFERENCES

There are a range of key opportunities for product development in the Lake Eildon region. These have been developed as a result of research undertaken during Stage 1 of the project, extensive consultation, product and experience audits, and future visitation modelling.

Table T10 provides an overview of the product, experience and accommodation preferences of the Lake Eildon region target markets. This includes the alignment of visitor needs to existing product in the region, as well as opportunities for product development that align to the needs for each market.

It is estimated that the Habitual market currently accounts for approximately 48% (417,580 visitors) of the Lake Eildon region market, and the Lifestyle Leader market accounts for only 20% (173,992) visitors to the region in 2018.

With a projected growth of 604,922 visitors by 2030, there will be a critical need to deliver product and experiences to service this growth. The key strategy for the region will be to grow the Lifestyle Leader market from the current estimated proportion of 20% of visitation (123,992 visitors) to reach 30% of the visitor market in 2030 (442,464 visitors).

Investment in quality contemporary tourism experiences will assist in attracting the Lifestyle Leader market, and will bridge the gap between the Habitual and Lifestyle Leader markets significantly by 2030.

T10. MARKET PREFERENCES

Market	Market Description	Current % of market		Target for Lake Eildon (2030)	Alignment to Lake Eildon region product	Accommodation Preferences	Product Gaps
		Lake Eildon*	High Country				
Habitual Market	Habitual visitors are generally low-yielding visitors who are largely self-sustaining and self-catering, with fairly fixed visitation patterns. These include visitors camping and caravanning in the area, holiday home and houseboat visitors. Their visitation patterns are largely fixed and they are not as easily influenced as Lifestyle Leaders to try new products and experiences.	48% of market 417,580 visitors	28%	38% 560,454	Hunting 4wd driving Walking/Hiking Fishing Boating	Self-contained accommodation Camping Caravan	Family-friendly activities Pubs and casual dining Retail offer
Lifestyle Leader Market	Lifestyle Leaders are educated, professional and progressive individuals who enjoy seeking out new information and being the first to try new products. They have a higher level of discretionary expenditure than the general population so they can afford to indulge more often in travel, with a particular desire to escape city life and embrace nature/outdoors and new discoveries.	20% of market 173,992	40%	30% of market 442,464	Touring Walking/Hiking Cycling Houseboats	Resort-style accommodation Experiential accommodation Boutique accommodation	Arts and culture Festivals and events Agri-business and farmgate experiences Wineries, breweries and distilleries Destination Dining Formalised nature-based experiences Indigenous cultural touring Retail offer

*Estimated based on survey results. 48% of visitors to the Lake Eildon region are caravan/camping visitors who are mainly considered habitual visitors, and 20% are houseboat and holiday home visitors, who can be considered Lifestyle Leaders as they have a higher discretionary income (although they still have Habitual habits being return visitors to the region).

5.5. ACCOMMODATION NEED

ACCOMMODATION FORECASTING

In 2018, there was a total 775,674 visitors staying overnight across the Lake Eildon region, of which only 313,184 were staying in paid accommodation (36%).

Utilising the visitor growth rates detailed in Section 7.4 Visitation Projections, it is estimated that there will be an additional 107,242 - 960,522 visitors staying in paid accommodation by 2030.

Based on the projected growth of visitors staying in paid accommodation, Table T10 provides a forecast for accommodation needs. The analysis utilises the following assumptions:

- Average length of stay per visitor is 5.8 nights;
- Average of 3.4 visitors per room; and
- Average room occupancy of 60% across the year.

This is based on data sourced from National Visitor Survey, primary research undertaken for as part of Stage 1 of the project, AirDNA data and ABS Survey of Tourist Accommodation.

Based on this analysis, future additional accommodation needs for the Lake Eildon region between 2018-2025 is between 194 and 1,606 rooms. It is assumed that the midpoint scenario of 685 rooms provides the most accurate reflection of accommodation needs in the Lake Eildon region, as there is a critical lack of quality contemporary accommodation stock.

T11. PROJECTED ACCOMMODATION NEEDS, LAKE EILDON REGION

	Low	Mid	High
Total visitor growth 2018-2025	82,321	290,649	681,616
Visitors staying in paid accommodation	29,636	104,633	245,382
Visitor nights	171,887	606,874	1,423,214
Room nights	50,555	178,492	418,592
Rooms	139	489	1,147
Supportable Rooms (at 60% occupancy)	194	685	1,606

Source: Urban Enterprise, PAVE modelling and Stage 1 primary research, 2019.

Based on the gaps identified in accommodation and the projected accommodation needs in the region, Table T11 overleaf provides an overview of specific accommodation typologies that may be supported in the region between 2018-2025.

This should be used as a guide for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region.

The number of establishments identified in the table relate to the mid-point scenario room/site limit identified above.

T12. FORECAST ACCOMMODATION NEEDS BY ACCOMMODATION TYPE, 2018-2025

Type	Description/Rationale	Need (# additional establishments to 2027)	Indicative capacity (rooms per establishment)	Total Room/Sites	Location
Integrated Resort and Residences	An integrated tourist resort which includes quality hotel style or self-contained accommodation as well as a number of other uses such as restaurant, conference centre, recreation, and spa and wellness. Quality examples of this include Peppers Mineral Springs and Bellinzona Resort in Daylesford, as well as the RACV resorts around Victoria. There is opportunity to develop a residential component alongside to improve commercial viability. Provisions could include 4 star accommodation, children's play spaces, pool and splash park, gym and spa facilities and dining experiences.	2	80 rooms	160	Eildon Boat Club Mountain Bay Special Use Zone land
Small scale experiential accommodation	There is opportunity to develop a range of small scale experiential accommodation types, such as eco-lodges, nature-based, farm stay and lodge accommodation. There is opportunity for these types of accommodation to be developed either along the waterfront and in rural locations with picturesque views of the Lake.	20	2-10 rooms	80	Any scenic location Skyline Road between Eildon and Bonnie Doon
High quality fishing lodge	Development of a high-quality fishing lodge to attract international fishing markets and high-end domestic markets. Fishing lodges are particularly successful in places like New Zealand, with examples like Blanket Bay Fly Fishing Lodge attracting high-end fishing markets. There is opportunity to develop this lodge on the pondage.	1	50 rooms	50	Lake Eildon Pondage
Quality Contemporary Budget Accommodation	There is a lack of quality contemporary budget accommodation for young visitor groups and budget travellers visiting the region. The region could also attract international or interstate backpackers with a strong product profile for this market (outdoor adventure and water-based activities at Lake Eildon etc), however there is no provision of budget accommodation.	1	50 rooms	50	Eildon
Tourist Park	Rural areas are an attractive location for the development of a Tourist Park, and are a crucial gap in accommodation in the Delatite Valley region. Development of a tourist park in Merrijig is ideal, given the natural landscape and rural setting, and requirement for large sites.	3	"40 cabins		Eildon, Goughs Bay, Bonnie Doon
Glamping	Glamping could occur in a range of locations with a Mount Buller view within the Delatite Valley, which would attract nature-based visitors and younger adult couples. There is particular opportunity to develop accommodation along the ridge above from Pinnacle Valley Resort in the Sawmill/Alpine Ridge subregion.	60 sites"	240		Any location with lake views
High quality Airbnb	There is a need to promote more high quality, contemporary Airbnb stock, as the current supply is outdated and not meeting market needs.	5	5-8 sites	30	Any location
Total		52		685	

5.6.2. MOTIVATIONS FOR VISITING OFF-PEAK

Survey respondents identified the top reasons they would be motivated to travel to the Lake Eildon region outside of peak season, which include events, fishing and activities. These key focus areas highlight the need for investment in tourism product and experiences that focus development away from on-water experiences.

Activities can include nature-based experiences and family friendly activities, but also include experiences like dining and night life. It is necessary to develop the diversity of product experiences within the region, in order to attract a wider market.

Visitors also identified a range of factors influencing their motivations to visit the region, such as water, nature, serenity, escape. These highlight the importance of both maintaining and enhancing the nature-based experience that Lake Eildon is well-regarded for.

F11. MOTIVATIONS FOR VISITING OFF PEAK SEASON



6. SETTLEMENT, PROPERTY AND SUPPORTING INFRASTRUCTURE

6.1. INTRODUCTION

The following section provides an overview of key settlement and population patterns and trends in the Lake Eildon region.

This includes an analysis of:

- **Demographics.** This includes a profile of current population trends;
- **Property and settlement.** Number of resident and non-resident properties by sub-region, analysis of housing trends and prices;
- **Planning zones and overlays.** This includes an overview of planning zones and overlays on land across the region, including townships, National Park land and shoreline;
- **Servicing and infrastructure.** This includes tourism infrastructure and facilities, water access and water levels, sewerage and potable water infrastructure, and telecommunications.

6.2. KEY FINDINGS

The Lake Eildon region has a small population base of approximately 3,500 people, experiencing low growth of 1.2% per annum between 2011 and 2016. Much of this growth can be attributed to the transition of holiday home owners into permanent residents.

Key settlements include Eildon and Bonnie Doon, each with 1,018 residents and 569 respectively. The region has an ageing population, with a median age of 56 across the region, compared to lower median ages in Mansfield Shire (48), Murrindindi Shire (48) and Regional Victoria (43).

The Lake Eildon region experiences significant levels of disadvantage, with Eildon and Jamieson ranking as some of the most disadvantaged suburbs across the

state. This highlights the need for increased community services, as well as the need to attract additional younger residents to strengthen the workforce and grow the regional economy.

There is a significant holiday home base throughout the region, with 610 non-resident dwellings in Bonnie Doon, 487 in Eildon/Taylor Bay and 327 in Goughs Bay/Mountain Bay. Bonnie Doon has experienced significant growth in population and median house prices, due to strong growth in Mansfield pushing residents out to other towns with lower house prices such as Bonnie Doon.

There is a lack of zoned land to support development in the Lake Eildon region, particularly in terms of limited Commercial 1 Zone (C1Z) and General Residential (GRZ1) zoned land in town centres, constraints on National Park Land development due to Public Conservation and Resource Zone (PCRZ), and limitations on commercial development due to Farming Zone (FZ).

Settlements are currently quite dispersed throughout the Lake Eildon region, with fragmented townships, dispersed population and sporadic investment in infrastructure and township amenities. Key townships of Jamieson and Goughs Bay are constrained by a lack of sewerage, with Bonnie Doon and Eildon having access to sewerage and potable water but requiring upgrades. Sewerage upgrades will unlock significant development potential across the region.

Strategic prioritisation of investment should be considered in the key townships of Eildon, Goughs Bay and Bonnie Doon. This is due to a range of factors such as consistent access to Lake Eildon across a range of water levels, proximity to Mansfield and Alexandra, existing town centres, higher population bases, sewerage and water infrastructure in Eildon and Bonnie Doon, and potential to capitalise on visitation to Mount Buller for Goughs Bay and Bonnie Doon.

6.3. DEMOGRAPHICS

6.3.1. POPULATION

HISTORICAL POPULATION

The Lake Eildon region (Lake Eildon) has a population of approximately 3,500 people, growing by 1.2% per annum between 2011 and 2016. This level of population growth is on par with Regional Victoria, which increased 1.3% per annum over the same time period.

Lake Eildon's population was influenced by positive growth in Bonnie Doon (+1.8% p.a.) and Jamieson (+1.0% p.a.). Growth in median house prices in Mansfield has pushed residents to Bonnie Doon, which is likely to have driven the growth in population in Bonnie Doon. Furthermore, the popularity of Jamieson and Bonnie Doon as holiday home destinations would have also influenced the transition of holiday home owners to permanent residents.

Goughs Bay suffered a decline in residents between 2011 and 2016, which is likely to be due to the conversion of permanent residents to holiday home owners.

T13. HISTORICAL POPULATION – LAKE EILDON REGION 2011 & 2016

Locality	2011	2016	Change	Change (%)	AAGR (%)
Eildon	991	1,018	27	2.7%	0.5%
Bonnie Doon	520	569	49	9.4%	1.8%
Goughs Bay	323	305	-18	-5.6%	-1.1%
Jamieson	288	302	14	4.9%	1.0%
Lake Eildon region	3,298	3,506	208	6.3%	1.2%
<i>Regional Victoria</i>	<i>1,345,727</i>	<i>1,433,818</i>	<i>88,091</i>	<i>6.5%</i>	<i>1.3%</i>
Mansfield	7,891	8,589	698	8.8%	1.7%
Murrindindi	13,057	13,730	673	5.2%	1.0%

Source: Australian Bureau of Statistics, 2011 & 2016

FORECAST POPULATION

Mansfield Shire is forecast to increase by approximately 2,000 persons to reach 10,970 people by 2036 (1.1% growth p.a.). Murrindindi Shire's population is projected to grow slightly slower at 0.9% per annum, reaching 17,020 by 2036.

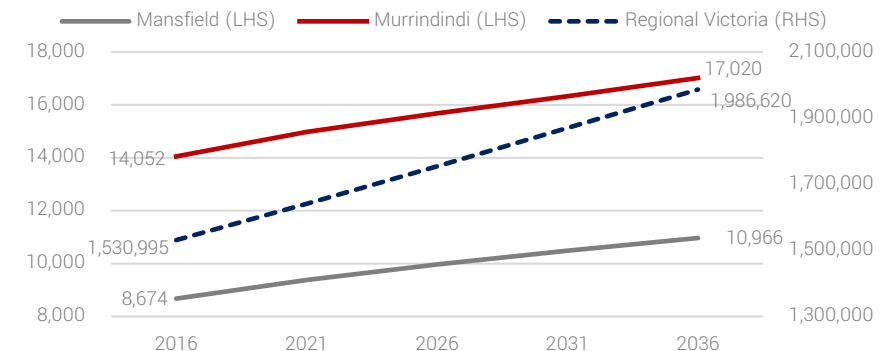
The two Shires are forecast to grow at a slower rate than Regional Victoria, which is projected to grow an average rate of 1.3% per annum, with 412,800 people by 2036.

T14. FORECAST POPULATION, 2018 TO 2036

	2018	2036	Total Growth	Average Annual Growth Rate
Mansfield	8,980	10,970	1,990	1.1%
Murrindindi	14,480	17,020	2,540	0.9%
Regional Victoria	1,573,820	1,986,620	412,800	1.3%

Source: Population forecasts, Victoria in Future, 2019, derived by Urban Enterprise

F12. FORECAST POPULATION 2016 TO 2036



Source: Population forecasts, Victoria in Future, 2019, derived by Urban Enterprise

6.3.2. AGE PROFILE

The Lake Eildon region has a very high median age (56 years old), significantly higher than both Mansfield and Murrindindi Shires (48 years old respectively) and regional Victoria (43 years old).

There is a need to provide adequate health and community services for the ageing population, as well as to attract younger residents and families to the region.

T15. MEDIAN AGE, LAKE EILDON REGION BENCHMARKED

	Median Age
Lake Eildon region	56
Mansfield Shire	48
Murrindindi Shire	48
Regional Victoria	43

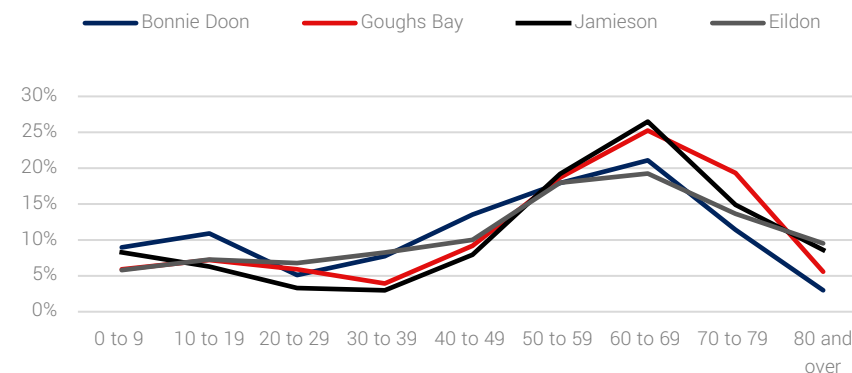
Source: Australian Bureau of Statistics, 2016

The age profiles for the localities of Jamieson and Goughs Bay are slightly older than Eildon and Bonnie Doon. Jamieson and Goughs Bay have a higher proportion of persons aged between 50 and 79 years compared to Bonnie Doon and Eildon, and a lower proportion of persons aged between 20 and 49 years.

Lake Eildon has an older age profile when compared to Regional Victoria, as shown in Figure F14.

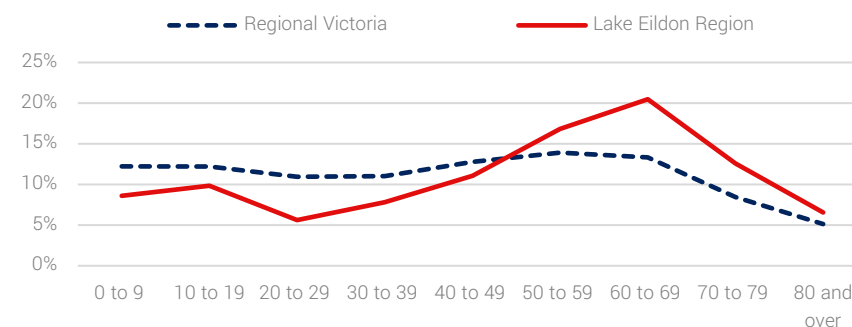
Lake Eildon has a significantly higher proportion of residents aged 50 and over than Regional Victoria and a lower proportion of persons aged between 0 and 39.

F13. AGE GROUP – LAKE EILDON SUB-REGIONS – 2016



Source: Australian Bureau of Statistics, 2016

F14. AGE GROUP – LAKE EILDON REGION & REGIONAL VICTORIA – 2016



Source: Australian Bureau of Statistics, 2016

6.3.3. SOCIO ECONOMIC PROFILE

SEIFA

The Socio-Economic Index for Areas (SEIFA) Index measures the relative level of socio-economic disadvantage based on a range of Census characteristics. The index is derived from attributes that reflect disadvantage such as low income, low educational attainment, high unemployment, and jobs in relatively unskilled occupations.

A higher score on the index means a *lower* level of disadvantage (or higher level of advantage). The national average index score is 1,000, with a score below 1,000 on the index indicating that area has a *higher* level of disadvantage relative to the national average.

The localities of Macs Cove, Howqua and Howqua Inlet have the highest level of advantage in the region at 1001, although this is only just above the national average.

According to SEIFA, the locality of Eildon is the most disadvantaged in the Lake Eildon region, with an index score of 901. Eildon is one of the most disadvantaged suburbs across Victoria, with a ranking of 132 out of 2,672 state suburbs. Jamieson is similarly disadvantaged, with a ranking of 174 out of 2,672 suburbs. These towns are not receiving the investment and support that is required, relative to the level of disadvantage experienced in the region.

T16. SEIFA – LAKE EILDON SUBREGIONS – 2016

Locality	SEIFA Index	Ranking within VIC (2,672 State Suburbs)
Bonnie Doon	946	407
Howes Creek	960	584
Goughs Bay	960	583
Macs Cove	1001	1261
Jamieson	911	174
Eildon	901	132
Thornton	948	431
Mountain Bay	960	582
Howqua	1001	1259
Howqua Inlet	1001	1260
Taylor Bay	943	365

Source: Australia Bureau of Statistics, SEIFA Index, 2016.

T17. SEIFA – MANSFIELD & MURRINDINDI – 2016

Locality	SEIFA Index	Ranking within VIC (79 LGAs)
Mansfield	986	48
Murrindindi	973	38

Source: Australia Bureau of Statistics, SEIFA Index, 2016.

UNEMPLOYMENT RATE

As at 2016, approximately 96% of Lake Eildon's labour force were employed, with an unemployment rate of 4.1%. This is slightly lower than Regional Victoria's unemployment rate of 5.9%.

Lake Eildon's lower unemployment rate has been supported by strong employment in Goughs Bay (2.8% unemployment), while Bonnie Doon (5.9%) has a relatively high unemployment rate for the region.

T18. UNEMPLOYMENT RATE – LAKE EILDON & REGIONAL VICTORIA – 2016

Occupation	Bonnie Doon	Goughs Bay	Jamieson	Eildon	Lake Eildon region	Regional Victoria
Employed	238	103	89	355	1,349	651,235
Unemployed	15	3	9	18	57	41,001
Unemployment rate	5.9%	2.8%	9.2%	4.8%	4.1%	5.9%

Source: Australian Bureau of Statistics, 2016

6.3.4. PLACE OF WORK

Table 19 shows the proportion of Mansfield workers who live in either Mansfield or Murrindindi. More than 90% of the Mansfield workforce are from Mansfield, with only 1% travelling from Murrindindi.

Table T20 shows the share of Murrindindi workforce who live in either Murrindindi or Mansfield. 82% of Murrindindi workers also live in the town, while 1.2% travel from Mansfield for work.

T19. MANSFIELD WORKERS' USUAL RESIDENCE - 2016

Place of Usual Residence	Employed in Mansfield	
	Workers	%
Mansfield	2,916	90.5%
Murrindindi	31	1.0%
Other	276	8.6%
Total Workforce	3,223	100%

Source: Australian Bureau of Statistics, 2016

T20. MURRINDINDI WORKERS' USUAL RESIDENCE – 2016

Usual Residence	Employed in Murrindindi	
	Workers	%
Murrindindi	3,377	82.0%
Mansfield	48	1.2%
Other	692	16.8%
Total Workforce	4,117	100%

Source: Australian Bureau of Statistics, 2016

6.4. PROPERTY AND HOUSING

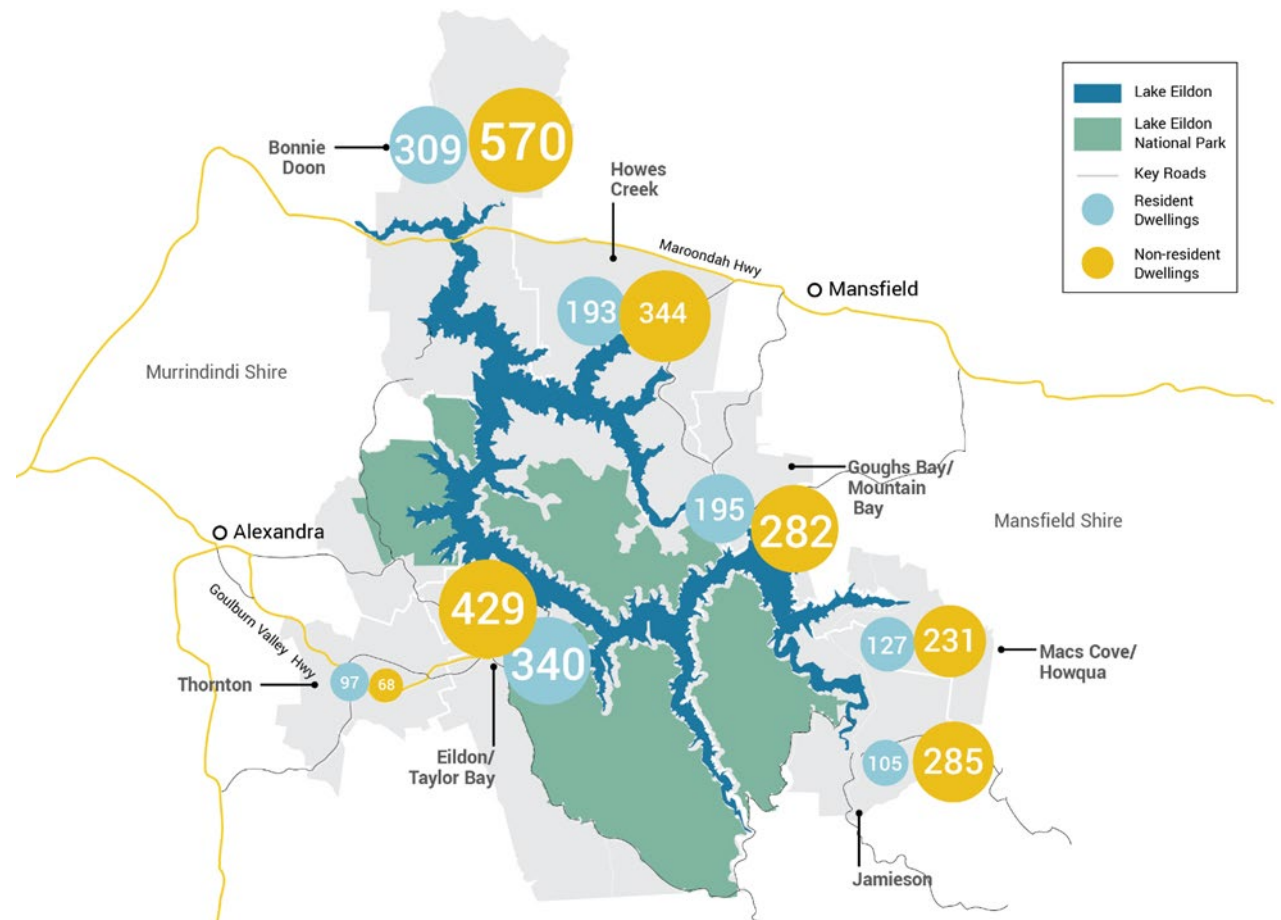
6.4.1. PROPERTY ANALYSIS EILDON REGION

Figure F15 shows a breakdown of resident and non-resident properties by subregion.

Eildon/Taylor Bay has the largest population base at 340 properties, followed by Bonnie Doon at 309 residents.

Bonnie Doon has the highest number of holiday homes, with 610 non-resident properties, followed by Eildon/Taylor Bay (487) and Goughs Bay/Mountain Bay (327).

F15. RESIDENT VS. NON-RESIDENT PROPERTIES BY SUBREGION



Source: Urban Enterprise, property data from Mansfield and Murrindindi Shires, 2019.

6.4.2. DWELLING GROWTH

There are approximately 3,300 dwellings in Lake Eildon; 47% of which are occupied private dwellings and 53% are unoccupied.

Between 2011 and 2016, dwellings have increased by 170, growing at an average rate of 1.1%. Growth has been supported by a rise in dwellings in Jamieson and Bonnie Doon, while there was a reduction of 8 dwellings in Eildon.

T21. DWELLING GROWTH – LAKE EILDON & SUBREGIONS – 2011 & 2016

Locality	2011	2016	Change (#)	Change (%)	AAGR (%)
Eildon	885	877	-8	-0.9%	-0.2%
Bonnie Doon	617	648	31	5.0%	1.0%
Goughs Bay	389	419	30	7.7%	1.5%
Jamieson	342	387	45	13.2%	2.5%
Lake Eildon region	3,129	3,299	170	5.4%	1.1%

Source: Australian Bureau of Statistics, 2011 & 2016

T22. DWELLING TYPE – LAKE EILDON & SUBREGIONS – 2016

	Occupied private dwellings		Unoccupied private dwellings		Total	
	(#)	(%)	(#)	(%)	(#)	(%)
Bonnie Doon	248	38%	403	62%	648	100%
Goughs Bay	143	34%	276	66%	419	100%
Jamieson	130	34%	260	67%	387	100%
Eildon	484	55%	388	44%	877	100%
Lake Eildon region	1545	47%	1753	53%	3299	100%

Source: Australian Bureau of Statistics, 2016

The growth in dwellings is likely to be driven by demand for holiday houses and residential properties with high lifestyle amenity. This reinforces the need to provide adequate amounts of zoned residential land and infrastructure to service this growth.

6.4.3. DWELLING STRUCTURE

The majority of dwelling stock in Lake Eildon is characterised by separate houses, accounting for 94% of dwellings, while caravans, Cabins and houseboats make up 3.2% of dwellings in the region.

The remaining balance of stock comprises semi-detached (0.8%) ,flats or apartments (0.5%) or other (2.1%) dwellings.

T23. DWELLING STRUCTURE – LAKE EILDON SUBREGIONS – 2016

	Bonnie Doon		Goughs Bay		Jamieson		Eildon		Lake Eildon region	
	(#)	(%)	(#)	(%)	(#)	(%)	(#)	(%)	(#)	(%)
Separate house	629	97%	400	95%	352	91%	799	91%	3,097	93.9%
Semi-detached	0	0%	0	0%	4	1.0%	15	1.7%	26	0.8%
Flat or apartment	0	0%	0	0%	16	4.1%	0	0%	16	0.5%
Caravan	11	1.7%	0	0%	6	1.6%	23	2.6%	48	1.5%
Cabin, houseboat	3	0.5%	10	2.4%	4	1.0%	17	1.9%	57	1.7%
Other	6	0.9%	7	1.7%	10	2.6%	29	3.3%	70	2.1%
Total	648	100%	419	100%	387	100%	877	100%	3,299	100%

Source: Australian Bureau of Statistics, 2016

6.4.4. MEDIAN HOUSE PRICES

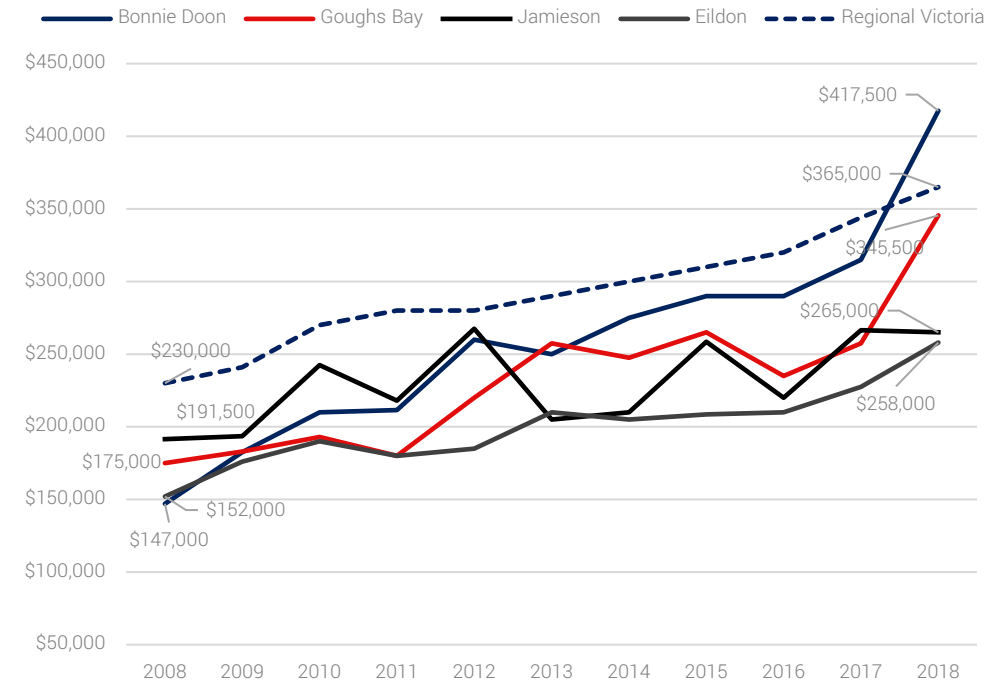
Property prices across all the Lake Eildon localities increased between 2008 and 2018, in line with growth for Regional Victoria.

The median house price in Regional Victoria was \$365,000 in 2018, having increased 5% per annum since 2008.

Bonnie Doon experienced the strongest price growth at 11% per annum, with the median house price valued at \$417,500 in 2018. Much of this growth has been experienced because of the rising house prices in Mansfield township, which has pushed residents to move out to other locations, with Bonnie Doon being a prime location due to proximity to Mansfield.

The lowest level of growth was registered by Eildon at 3.3% per annum. This is related to the low socio-economic status of the town and limited private and public investment in the township.

F16. MEDIAN HOUSE PRICES BY TOWN, 2008-19



Source: A Guide to Property Values, Annual Data and Analysis from Valuer-General Victoria 2018.

6.5. PLANNING ZONES AND OVERLAYS

The following section provides an analysis of both planning zones and overlays affecting land in the Lake Eildon region. Figure F17 shows the zones affecting the Lake Eildon region and Figure F18 shows the overlays affecting the region.

PLANNING ZONES

Public Conservation And Resource Zone

All Lake Eildon National Park land is zoned Public Conservation and Resource Zone (PCRZ).

Under PCRZ, a permit is not required for infrastructure related developments (e.g. boat ramps, jetties, roads) and some recreational uses (e.g. open sports ground, camping and caravan park). This is provided the use is either conducted by or on behalf of a public land manager or Parks Victoria, or specified in an incorporated plan in a schedule to this zone:

This zone is unable to support commercial uses by an external provider, such as the recent glamping trails undertaken at Devils Cove. These were only viable in the PCRZ because they were conducted by the public land manager (i.e. Parks Victoria), however Parks Victoria may not have the resources to sustain this long-term.

Farming Zone Land (FZ)

There is significant portions of Farming Zone (FZ) land in the Lake Eildon region, particularly in Taylor Bay, Eildon, Howqua, Macs Cove, Howes Creek and Bonnie Doon.

This zone restricts commercial and residential development with provisions for each lot to be at least 40 hectares, with a permit required to subdivide land (Pursuant to Clause 35.07-3). This can impact the viability of potential restaurant and café developments, and may discourage potential business owners from setting up in the area. Furthermore, development of ancillary retail is prohibited in the Farming Zone.

Rezoning of strategic sites within the Farming Zone should be explored, to encourage commercial development around Lake Eildon.

General Residential Zone

There are very limited amounts of developable General Residential Zone (GRZ) land in townships, including Eildon, Bonnie Doon and Goughs Bay. GRZ land allows for standard development of a single detached house on a lot. A permit is required to subdivide land, which restricts commercial development in this zone.

Rural Living Zone (RLZ)

There are significant portions of Rural Living Zone (RLZ) land surrounding Burnt Creek Inlet on the Mansfield Shire side of the Lake and at Peppin Point, as well as smaller areas of RLZ in Goughs Bay, Eildon and Bonnie Doon townships.

Rural Conservation Zone (RCZ)

All developed land in Taylor Bay is in the Rural Conservation Zone, meaning a permit is required for a dwelling or any commercial uses or developments (with the exception of a bed and breakfast). Schedule to the Rural Conservation Zone specifies a minimum subdivision size of 5 hectares.

This zone is inappropriate for the current residential use of the Taylor Bay area.

Public Park And Recreation Zone (PPRZ)

Development of any commercial use must be either a use conducted by or on behalf of a public land manager or Parks Victoria, or a use specified in an incorporated plan in a schedule to this zone.

The Incorporated plan must be consistent with the intent of the public land reservation under any Act and make reference to relevant policies and guidelines. An Incorporated plan may be prepared in parts or stages.

PLANNING OVERLAYS

Bushfire Management Overlay

The Bushfire Management Overlay covers a significant proportion of the Lake Eildon region. The overlay is in place to ensure protection of human life through safe and appropriate development and management in bushfire risk areas.

Areas of the Lake Eildon region affected by the Bushfire Management Overlay include:

- Eildon (town centre not affected, but pondage area and most residential areas);
- Goughs Bay (portions of residential area to East of the township); and
- Taylor Bay (some of the residential settlement).
- All National Park land is affected by the Bushfire Management Overlay (BMO),

Pursuant to Clause 44.06-2, a permit is required to subdivide land. This does not apply if a schedule to this overlay specifically states that a permit is not required. A permit is required to construct a building or construct or carry out works associated with the following uses: *Accommodation (including a Dependent person's unit), Leisure and Recreation, Office, Place of assembly, Retail premises, Service station, Warehouse.*

Pursuant to Clause 44.06-3, it is required that planning applications are accompanied by the following:

- A **bushfire hazard site assessment** including a plan that describes the bushfire hazard within 150 metres of the proposed development
- A **bushfire hazard landscape assessment** including a plan that describes the bushfire hazard of the general locality more than 150 metres from the site.
- A **bushfire management statement** describing how the proposed development responds to the requirements in this clause and Clause 53.02.

Pursuant to Clause 44.06-8, before deciding on an application, in addition to the decision guidelines in Clause 53.02 and Clause 65, the responsible authority must consider, as appropriate:

- The Municipal Planning Strategy and the Planning Policy Framework.
- Any other matters specified in a schedule to this overlay

This presents a major constraint to development on National Park Land, as all planning applications must include a bushfire hazard site assessment, bushfire hazard landscape assessment and bushfire management assessment. Significant time and cost is associated with engaging a consortium of urban planners, architects and bushfire management specialists to develop the planning application, which would create a significant barrier for development into the future.

Environmental Significance Overlay

All of the Mansfield Shire side of the Lake is covered by the Environmental Significance Overlay, as well as the Jamieson Ward of the Lake Eildon National Park is affected by the Environmental Significance Overlay, and in particular by Schedule 1 to the overlay.

The objective of this overlay is to discourage development and works that potentially contribute to the degradation of water quality, as Lake Eildon supplies irrigation and potable water to nearby townships and downstream communities.

A permit is required to construct a building or construct or carry out any works for lots under 40 hectares, consistent with the Environmental Significance Overlay. This means a permit is required for the development of any dwelling in areas with this overlay, regardless of meeting all other conditions of the relevant zone.

Schedules 1 and 2 to the Overlay include:

- **ESO1: Catchments at high risk of water quality impacts.**
 - A permit is required for vegetation removal less than 50 metres from Lake Eildon or the Goulburn River, or 30 metres from another waterway.
 - This applies to most land closer to the shoreline.
- **ESO2: Catchments at medium risk of water quality impacts.**
 - A permit is required for vegetation removal less than 50 metres from Lake Eildon or the Goulburn River, or 30 metres from another waterway.
 - This applies to most land closer to the shoreline.

LAKE EILDON TOURISM MASTERPLAN



6.6. SERVICING AND INFRASTRUCTURE

6.6.1. TOURISM INFRASTRUCTURE AND FACILITIES

There are a range of existing tourism facilities in the region, including boat ramps, public toilets, campsites and barbecue facilities. Figure F19 shows the location and management of a range of facilities around the region. Most of the boat ramps in the region are owned and managed by Goulburn-Murray Water, with boat ramps in Lake Eildon National Park managed by Parks Victoria.

Table T24 shows the location and operational level of all public boat ramps within the Lake Eildon region. Significant water access issues exist in many locations, as existing boat ramps often do not reach the water due to fluctuating water levels. Boat Ramps operational at low levels include Eildon Alliance Ramp 2 (26%) and Ramp 3 (14.9%), Fraser Lakeside Ramp (11.2%), and Goughs Bay Shire Public Ramps 7 (21.20%) and 8 (21.65%)

The only boat ramps that comply with critical width and gradient requirements are the Alliance Boat Ramp in Eildon, Jerusalem Boat Ramp and Goughs Bay Boat Ramp no. 2. However, some of these Boat Ramps do not have consistent access to water (particularly Goughs Bay) and are unable to support the influxes of visitors at peak periods.

The standard of boat ramps and in particular the lack of facilities surrounding boat ramps including car parking, boat parking, toilets, picnic facilities and camping sites, hinders the use of the Lake. There will be opportunity to apply for funding to improve infrastructure through the Better Boating Fund currently being developed by Better Boating Victoria (due to be completed in 2020).

Fluctuating water levels makes it difficult to implement permanent lakeside structures. It will be critical to future-proof the Lake in a range of ways, including improving access to deep water (i.e. longer boat ramps at strategic locations and floating pontoons that move with the changing water level), improved boat ramp capacity to accommodate oversized houseboats and development of temporary as well as development of temporary lakeside structures (e.g. pop-up beach).

T24. PUBLIC BOAT RAMP FACILITIES

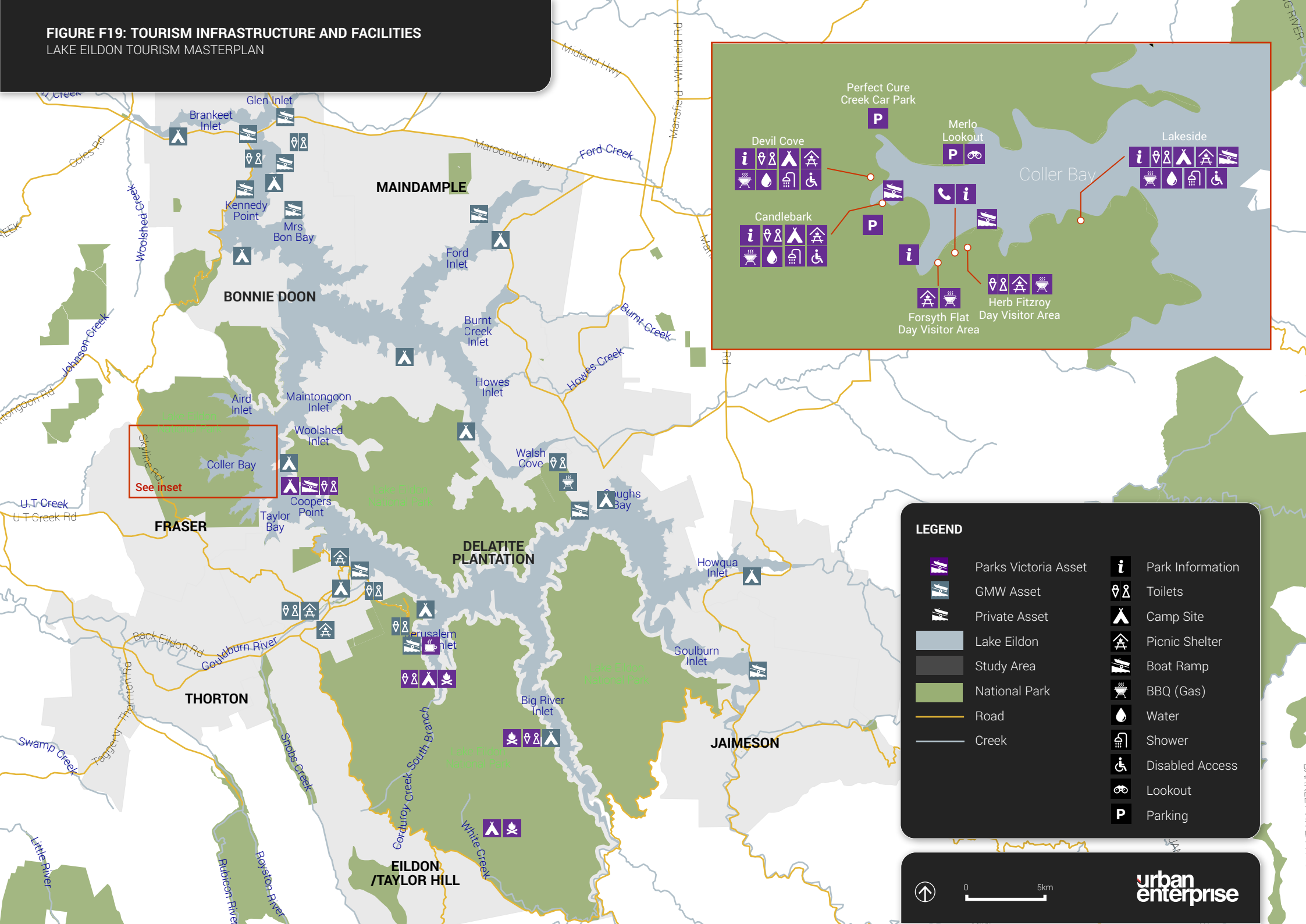
Boat Ramp Name	Location	Ramp	Operational Until
Eildon Alliance Public Ramp	Eildon Dam Wall, Embankment Rd	High Level Ramp 1	59.3%
		High Level Ramp 2	26%
		High Level Ramp 3	14.9%
Bonnie Doon Public Ramp	Maintongoon Rd, near Bonnie Doon Bridge	Public Ramp 1	84.2%
		Public Ramp 2	57.6%
Goughs Bay Public Ramp	Goughs Bay	GMW Public Ramp 1	78.50%
		GMW Public Ramp 2	86.70%
		GMW Public Ramp 3	-
		GMW Public Ramp 4	71.60%
		GMW Public Ramp 5	59.70%
		Shire Public Ramp 6	41.60%
		Shire Public Ramp 7	21.20%
		Shire Public Ramp 8	21.65%
		Mansfield Boat Club (now Goughs Bay Boat Club)	59.3%
Jerusalem Creek Ramp	Jerusalem Creek	Public Ramp 1	48%
		Public Ramp 2	8.8%
Fraser Block	Lake Eildon National Park, Fraser Block	Devils Cove	62%
		Main Ramp	39.4%
		Lakeside	11.2%
Jamieson Public Ramp	Jamieson	Public No 1 High Level	78.6%

Source: Goulburn-Murray Water, Lake Eildon Houseboat Information Booklet, 2017.

There are also a number of privately owned and operated boat ramps within the region, including:

- Eildon Boat Club Boat Ramp;
- Lake Eildon Marina Boat Ramp;
- Jerusalem Creek Marina Boat Ramp;
- Howqua Valley Caravan Park Boat Ramp;
- Home Point Boat Ramp; and
- Peppin Point Caravan Park Boat Ramp

FIGURE F19: TOURISM INFRASTRUCTURE AND FACILITIES
LAKE EILDON TOURISM MASTERPLAN



LEGEND

- | | | | |
|--|----------------------|--|------------------|
| | Parks Victoria Asset | | Park Information |
| | GMW Asset | | Toilets |
| | Private Asset | | Camp Site |
| | Lake Eildon | | Picnic Shelter |
| | Study Area | | Boat Ramp |
| | National Park | | BBQ (Gas) |
| | Road | | Water |
| | Creek | | Shower |
| | | | Disabled Access |
| | | | Lookout |
| | | | Parking |



0 5km

urban
enterprise

6.6.2. LAKE ACCESS AND WATER LEVELS

The following map shows the water levels for Lake Eildon at different storage levels, based on modelling undertaken by Goulburn-Murray Water. The map shows the reach of the Lake at 100%, 35% and 15% storage capacity.

In November 2019, Lake Eildon water storage levels reached 45%, therefore it is likely that the Lake will be at 35% or below during summertime 2020. As the irrigation period is August-May, there remains significant time for the Lake to reach critically low levels.

At 35%, the Lake recedes beneath the Bonnie Doon bridge, meaning there is no access to water in Bonnie Doon, either at the main boat ramp or from the town centre. Figure F20 shows the Lake at Bonnie Doon in May 2019, when it was at 35.81%.

At the 35% storage level, the Lake does not reach key visitor destinations of Jamieson, Macs Cove and Howqua

The map shows that even at the critically low level of 15% storage, there is still access to deep water from the following key locations: Eildon, Taylor Bay, Goughs Bay, Peppin Point and the Fraser Block of Lake Eildon National Park. It will be important to focus investment in infrastructure, services and tourism product around these visitor nodes that retain access to water across various conditions.

F20. LAKE EILDON AT 35 %, MAY 2019



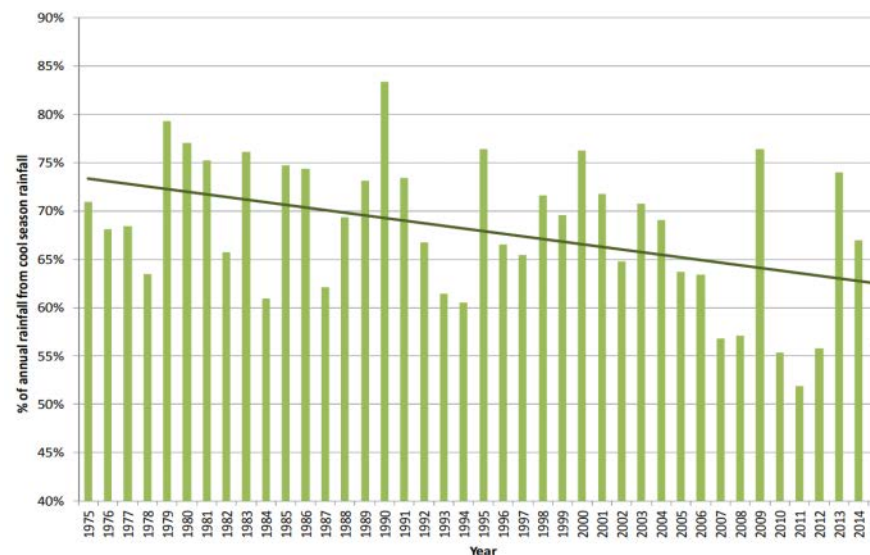
Source: Mansfield Courier, 2019

A 2016 study by the Department of Environment, Land and Water indicated that cool season rainfall (April-October) at Lake Eildon was trending downwards in absolute terms by around 35 mm per decade.

Six of the last nine years, including several years after the end of the Millennium Drought, displayed a cool season rainfall contribution lower than any other year since 1975. Between 1997 to 2015, summer rainfall has remained above the 1902-1975 average, but autumn (-29%), winter (-10%) and spring (-11%) all show declines.

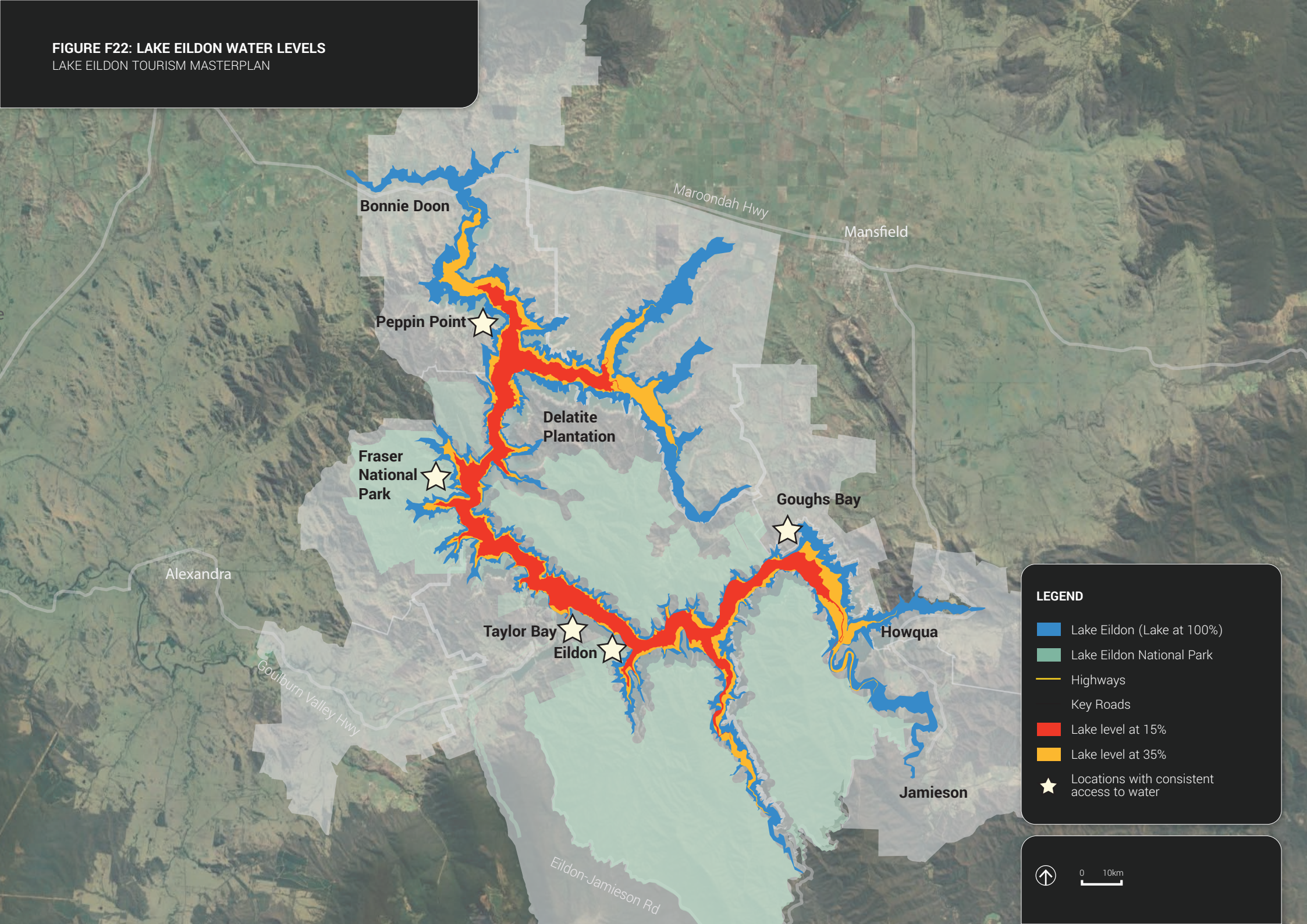
Declining rainfall trends are forecast to continue into the future, as climate change continues to adversely affect rainfall patterns. This will have significant impacts on water levels at Lake Eildon, therefore it will be crucial to mitigate the effects of climate change by future proofing the region with investment in a strong and diverse product mix that will provide steady visitation to the region even at times where the water level is low.

F21. RAINFALL TRENDS



Source: DELWP, 2016, Guidelines for Assessing the Impact of Climate Change on Water Availability in Victoria

FIGURE F22: LAKE EILDON WATER LEVELS
LAKE EILDON TOURISM MASTERPLAN



6.6.3. SERVICING

SEWERAGE

Wastewater management facilities in the Lake Eildon region are provided by Goulburn Valley Water, and are only provided to Bonnie Doon, Eildon, Thornton and the small section of Mansfield township along the Lake.

As shown in T25 below, it is anticipated that there is insufficient hydraulic capacity in Bonnie Doon and Eildon, however the capacity in the lakeside area of Mansfield township is sufficient.

There is sufficient organic capacity to support current and future levels of development in Bonnie Doon and Eildon, however not in the lakeside area of the Mansfield township.

There is insufficient irrigation capacity in Bonnie Doon at present, as the current irrigation facility in Bonnie Doon is landlocked and has very limited potential for expansion. Land acquisition may be required to expand the irrigation capacity.

T25. SEWERAGE INFRASTRUCTURE AND CAPACITY

Location	Sufficient Hydraulic Capacity		Sufficient Organic Capacity		Sufficient Irrigation Capacity	
	Current (Y/N)	Future (20 yrs) (Y/N)	Current (Y/N)	Future (20 yrs) (Y/N)	Current (Y/N)	Future (20 yrs) (Y/N)
Bonnie Doon	N	N	Y	Y	N	N
Eildon	N	N	Y	Y	n/a	n/a
Mansfield (area up to Maroondah Highway)	Y	Y	Y	N	Y	N

Source: Goulburn Valley Water, 2019. The figures above are correct as of 29/8/2019 and GVW bears no responsibility of their accuracy past this date.

Figures F23 and F24 show the sewerage infrastructure in Eildon and Bonnie Doon. Both towns have a very narrow sewerage boundary, which would need to be extended to facilitate expansion of the townships.

Goulburn Valley Water have indicated that there is no capacity to service additional properties in either town with current sewerage infrastructure. The Wastewater Management facility at Eildon has no spare treatment capacity, whereas there is no spare irrigation/winter storage capacity in Bonnie Doon. Additional land at a suitable location in Bonnie Doon would need to be purchased in order to expand the wastewater facility.

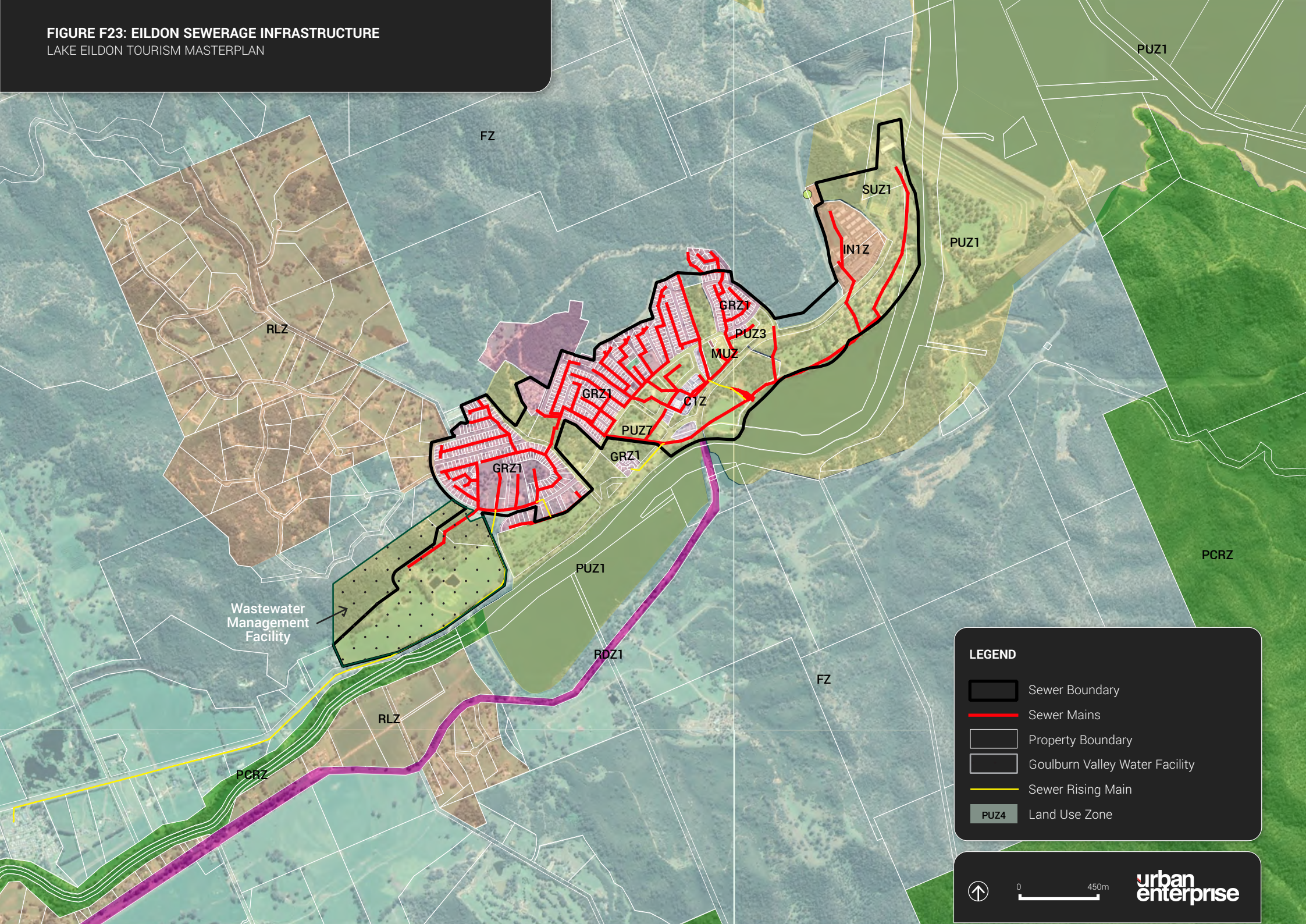
A lack of infrastructure in some locations, such as Mountain Bay and Goughs Bay, prevents economic and tourism development of the towns, particularly in terms of lack of sewerage. Sewerage investment will unlock significant development potential in these locations, providing opportunities for residential expansion, further development of a town centre and to minimise costs for potential investors.

Indicative costings for key sewerage extensions have been developed by Goulburn Valley Water, current as of November 2019. These include:

- Mansfield to Goughs Bay: \$8 --\$10 million
- Bonnie Doon to Peppin Point: \$7 --\$10 million
- Eildon to Jerusalem Creek: \$7 --\$10 million

Detailed costings will need to be undertaken by Goulburn Valley Water to identify likely costs of upgrades. Additionally, current sewerage infrastructure will need to be upgraded in both Eildon and Bonnie Doon to support any future investment and development in the townships.

FIGURE F23: EILDON SEWERAGE INFRASTRUCTURE
LAKE EILDON TOURISM MASTERPLAN



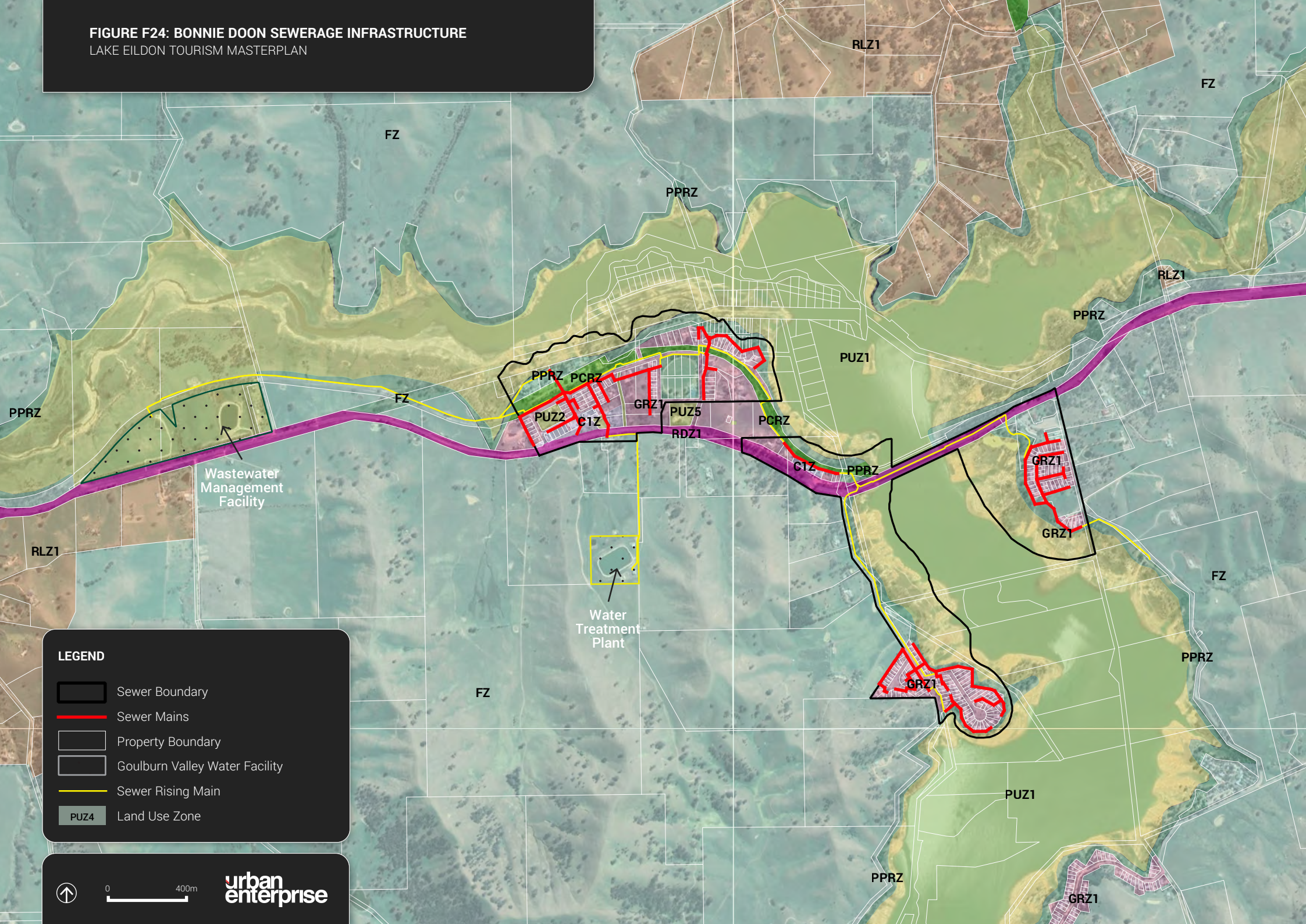
LEGEND

- Sewer Boundary
- Sewer Mains
- Property Boundary
- Goulburn Valley Water Facility
- Sewer Rising Main
- PUZ4 Land Use Zone

0 450m

urban enterprise

FIGURE F24: BONNIE DOON SEWERAGE INFRASTRUCTURE
LAKE EILDON TOURISM MASTERPLAN



WATER

Potable water is provided to the Lake Eildon region by Goulburn Valley Water, who provide potable water to Bonnie Doon, Eildon, Thornton and the lakeside area of Mansfield township as a part of their Upper Delatite region.

Table T26 shows both the current and future capacity of the water system in the Lake Eildon region. The water treatment plants have significant capacity to service an increase in peak day demand. The Water Treatment Plant in Eildon has the ability to service approximately 500 additional residential properties, whilst the Bonnie Doon plant is able to service an additional 250 residential properties approximately.

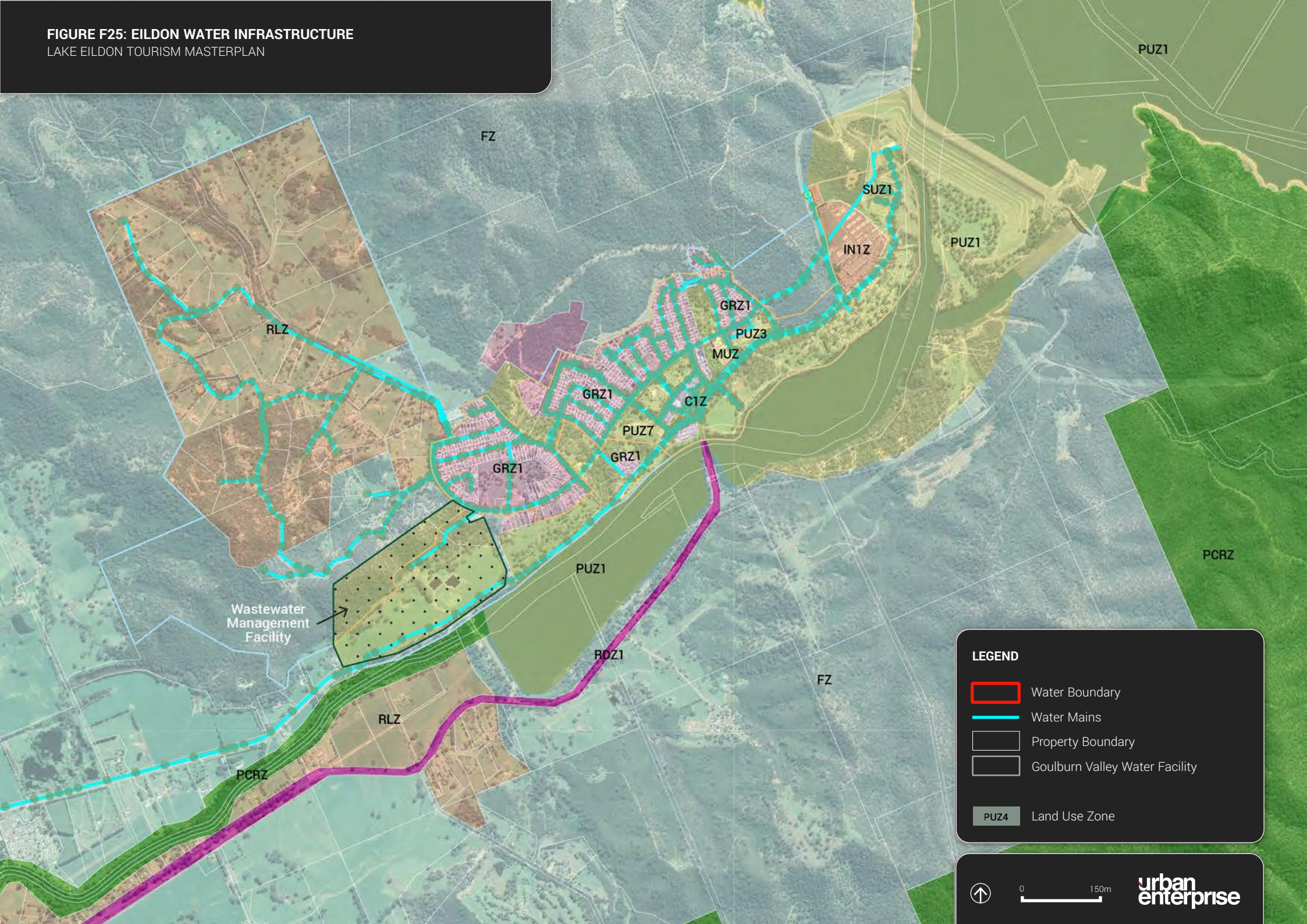
T26. POTABLE WATER INFRASTRUCTURE AND CAPACITY

Location	Capacity		
	Water Treatment Plant Capacity (ML/day)	Current Peak Day Demand (ML/day)	Forecast 20 year Peak Day Demand (ML/day)
Bonnie Doon	1.5	0.56	0.63
Eildon	2	1.09	1.26
Mansfield (area up to Maroondah Highway)	5.7	4.69	6.26






Source: Goulburn Valley Water, 2019. The figures above are correct as of 29/8/2019 and GVV bears no responsibility of their accuracy past this date.

There is however a need to connect the water system in Eildon to the Goulburn River tourism precinct at Snobs Creek, which encompasses the Snobs Creek Hatchery, the Blue Gums Caravan Park, Eildon Riverside Holiday Park and Eildon Holiday Park. There is significant potential to increase this precinct as a visitor destination.

FIGURE F25: EILDON WATER INFRASTRUCTURE
LAKE EILDON TOURISM MASTERPLAN

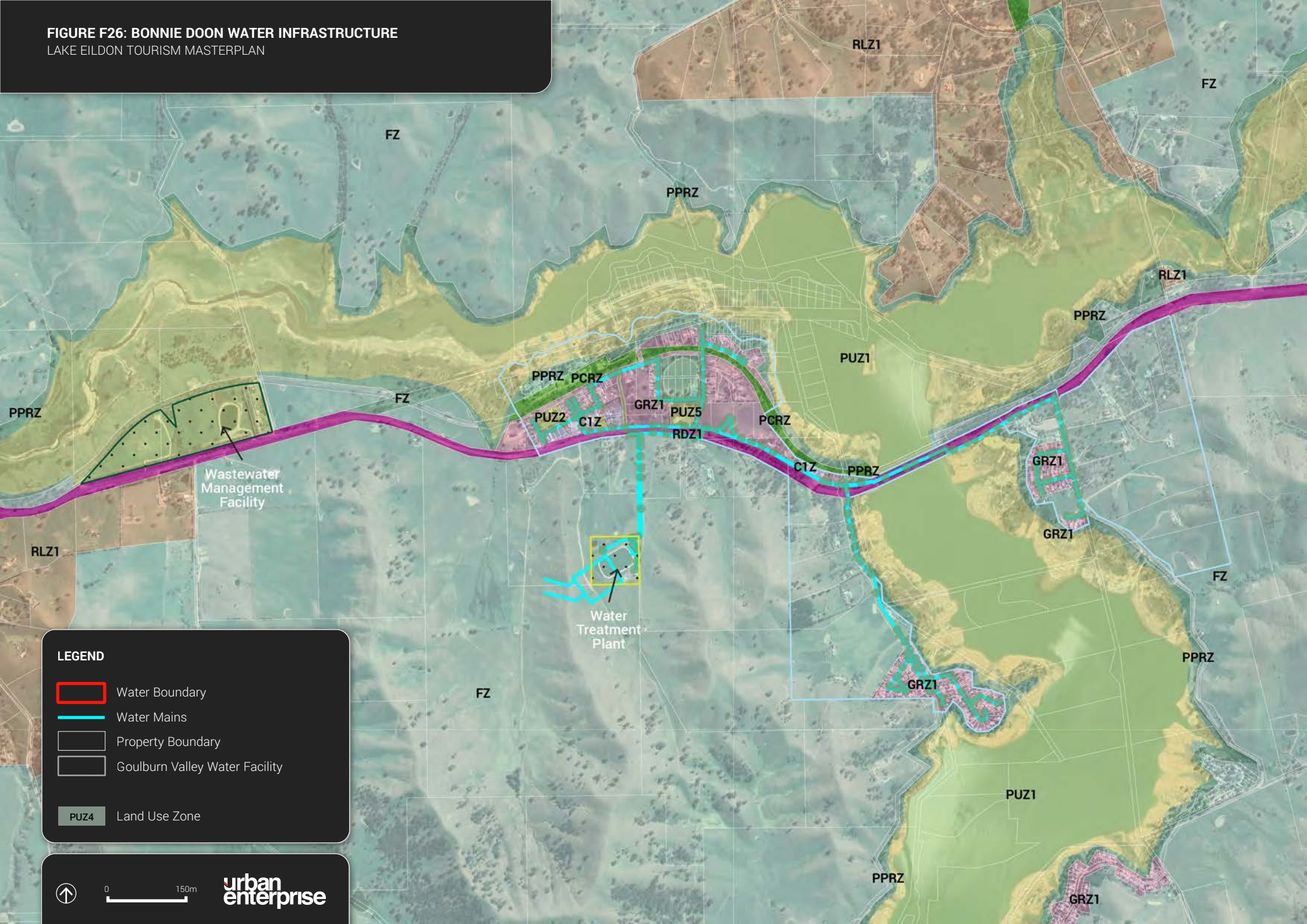


LEGEND






-  Water Boundary
-  Water Mains
-  Property Boundary
-  Goulburn Valley Water Facility
-  Land Use Zone

 0 150m 

FIGURE F26: BONNIE DOON WATER INFRASTRUCTURE
LAKE EILDON TOURISM MASTERPLAN



LEGEND

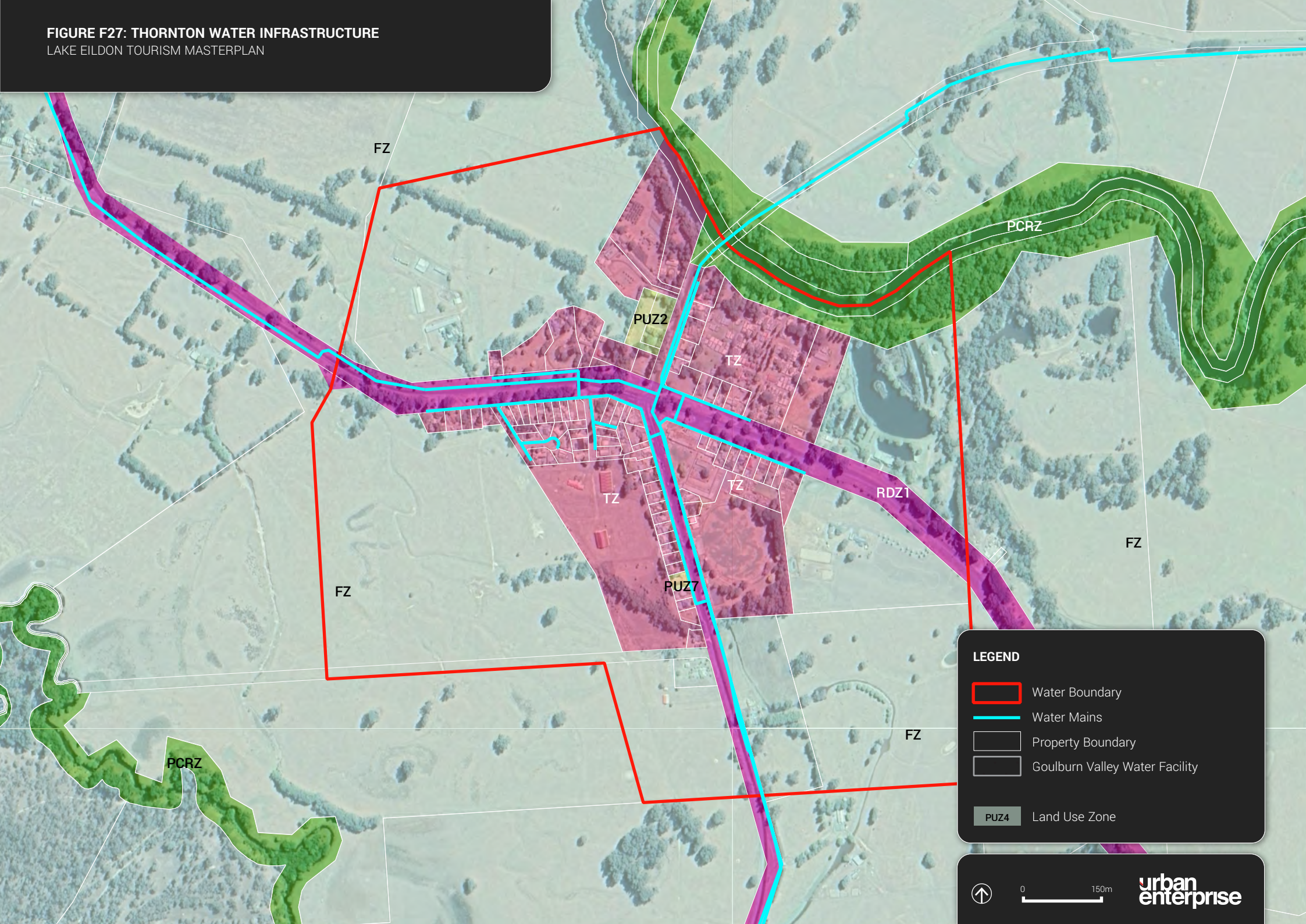
-  Water Boundary
-  Water Mains
-  Property Boundary
-  Goulburn Valley Water Facility
-  Land Use Zone



0 150m

urban
enterprise

FIGURE F27: THORNTON WATER INFRASTRUCTURE
LAKE EILDON TOURISM MASTERPLAN



LEGEND

- Water Boundary
- Water Mains
- Property Boundary
- Goulburn Valley Water Facility
- PUZ4 Land Use Zone

0 150m

TELECOMMUNICATIONS

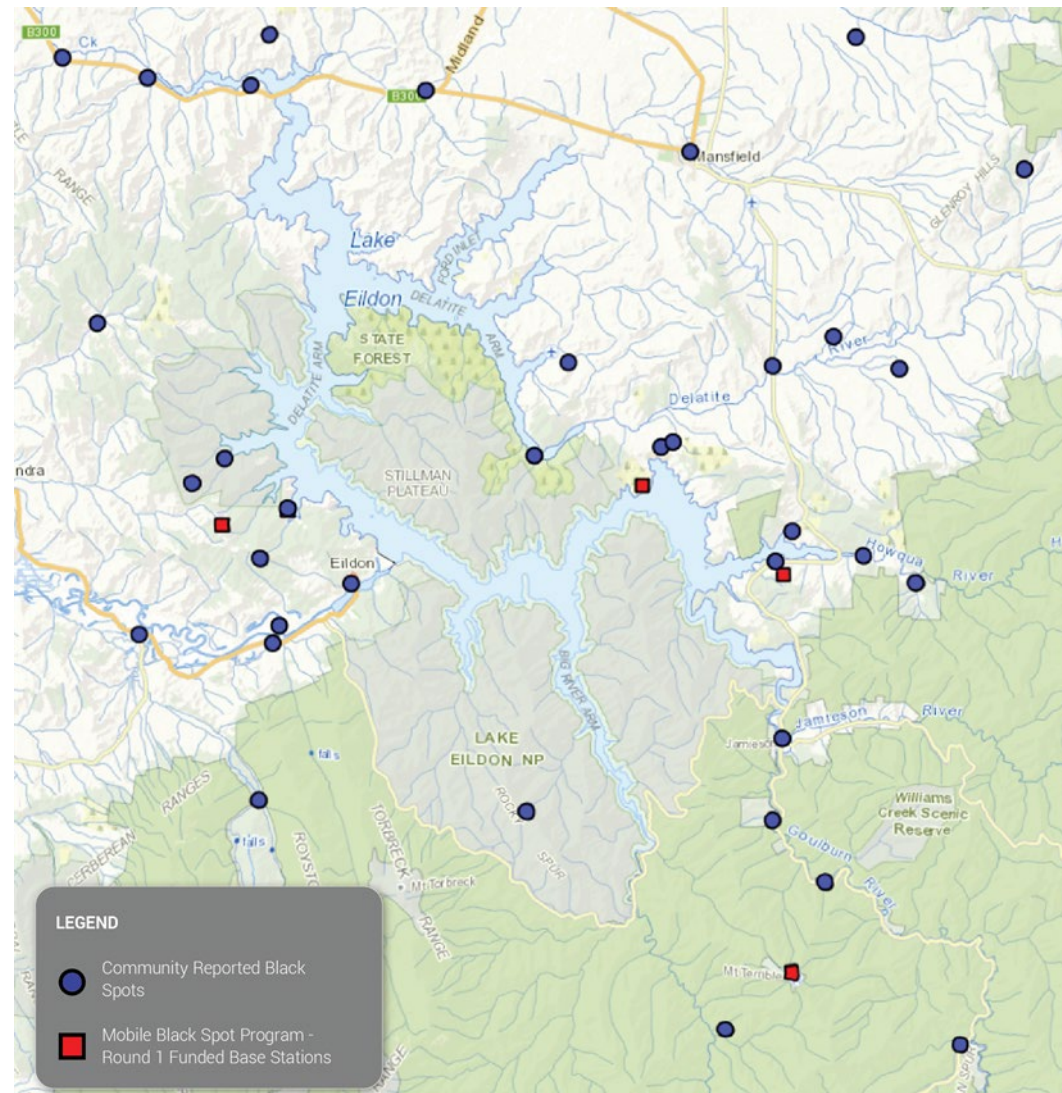
There are a significant number of mobile blackspots throughout the Lake Eildon region, particularly around Bonnie Doon, Jamieson, Eildon and Thornton, and Goughs Bay/Howqua.

These blackspots are shown in Figure F28, represented by the blue spots, along with new base stations funded through Round 1 of the Australian Government's Mobile Black Spot Program.

The Australian Government's \$380 million Mobile Black Spot Program will deliver improved mobile coverage to regional and remote Australia. Round 1 of the Program is delivering 499 new mobile base stations around Australia – 429 Telstra and 70 Vodafone base stations.

Although a number of improvements have occurred through the increased number of Base Stations funded, there are still a significant number of blackspots, particularly in the Lake Eildon National Park.

F28. BLACKSPOTS



Source: Department of Communications and the Arts, 2019.

7. LAND MANAGEMENT

7.1. INTRODUCTION

Outlined in this section is an overview of the land management structure in the Lake Eildon region, including an assessment of land management authorities, property ownership/management.

The aim of this section is to identify the key issues associated with governance in the region, and identify solutions to improve governance of Lake Eildon for tourism and recreational purposes.



7.2. KEY FINDINGS

There are a range of public land managers in the Lake Eildon region, with major land holdings managed by Parks Victoria, DELWP and Goulburn-Murray Water. This means it is difficult to ensure consistent approaches to land management and visitor services across the region, which has been a major factor hindering tourism development in the Lake Eildon region over the past few decades.

Due to the complexity of having multiple land managers, lack of resourcing of existing land managers as well as the region spanning two Local Government Areas, improved governance is needed to support delivery of this masterplan as well as manage ongoing infrastructure improvements, visitor servicing, marketing and investment facilitation.

A range of relevant Governance Options are explored in this report, with consideration of funding methods, statutory policy required and services provided by each governance model. The proposed options include:

- **Regional or Local Tourism Organisation;**
- **Statutory Management Board;**
- **Committee of Management;**

Improvement to the existing governance model: including MOUs between existing organisations and leveraging further from Tourism North East.

It is recommended that improvements to the existing governance structure and relationships be delivered in the immediate term to assist in delivery of the masterplan. Longer term alternative models may be investigated. These would need much greater level of investigation including a detailed feasibility.

7.3. LAKE EILDON REGION STAKEHOLDERS

Key land managers include Goulburn-Murray Water, which manage the Lake to the high water line and other properties (most surrounding Eildon township), Parks Victoria who manage Lake Eildon National Park, and DELWP which are the land managers for the Delatite Arm.

Table T27 outlines the governance structure for the Lake and surrounding areas.

T27. GOVERNANCE STRUCTURE

Key Bodies	Level	Roles and Responsibilities
Department of Environment, Land, Water and Planning (DELWP)	State	Manges the Delatite Arm Reserve land (excl. the Lake Eildon National Park land operated by Parks Victoria).
Parks Victoria	State	Parks Victoria are the management authority for the Lake Eildon National Park.
Regional Development Victoria (RDV)	State	Key funding and strategic support body for Lake Eildon.
Goulburn-Murray Water (GMW)	Regional	The lake is managed by GMW, which operates and maintains the infrastructure and the water stored in the lake. GMW also manage a significant amount of freehold land.
Lake Eildon Implementation Committee	Local	A committee run by GMW, including representatives from GMW, Mansfield Shire Council, Murrindindi Shire Council, Parks Victoria, DELWP, Amateur Fishing Associations and community representatives. This group is responsible for implementing the Lake Eildon Land and On Water Management Plan,
Murrindindi Shire Council	Local	Manages public land in Murrindindi Shire (excl. Parks Victoria, GMW and DELWP land)
Mansfield Shire Council	Local	Manages public land in Mansfield Shire (excl. Parks Victoria, GMW and DELWP land)
Tourism North East	RTB	Regional Tourism Board for the High Country region. Lake Eildon is promoted as a High Country product.

Source: Urban Enterprise, consultation and desktop research, 2019.

7.4. ROLE OF GOULBURN MURRAY WATER

Lake Eildon water supply operations are managed by Goulburn Murray Water (GMW). This includes management of the lake bed and public foreshore land, houseboat licensing, and approving development on the Lake Eildon foreshore.

FUNDING

Goulburn-Murray Water's role as manager of public recreational facilities is a legacy from when past State Authorities were funded by government to provide these services.

GMW's ability to support investment in recreation is limited, as revenue received from recreation supports GMW's water storages across Victoria through a consolidated funding pool. Appropriate funding mechanisms are required to allow GMW to support the ongoing management of recreation and public access at each of its water storages.

LAND MANAGEMENT & OWNERSHIP

Goulburn-Murray Water is responsible for managing the lake bed and the immediate foreshore land up to the high water mark. This land is a mixture of freehold land held in title and Crown Land with vested management.

Goulburn-Murray Water has a surplus of land that it either owns or manages on behalf of the State, particularly large areas of native forest land surrounding Eildon township. GMW's Corporate Plan identifies a need to actively identify opportunities to divest or reduce service levels at particular locations, including through sale or lease of land holdings.

7.5. LAKE EILDON REGION LAND MANAGEMENT

7.5.1. LAND HOLDINGS

Figure F30 shows an overview of the key public land holdings in the Lake Eildon region, including land managed by Parks Victoria, Department of Environment Land Water and Planning (DELWP), and Goulburn-Murray Water (GMW).

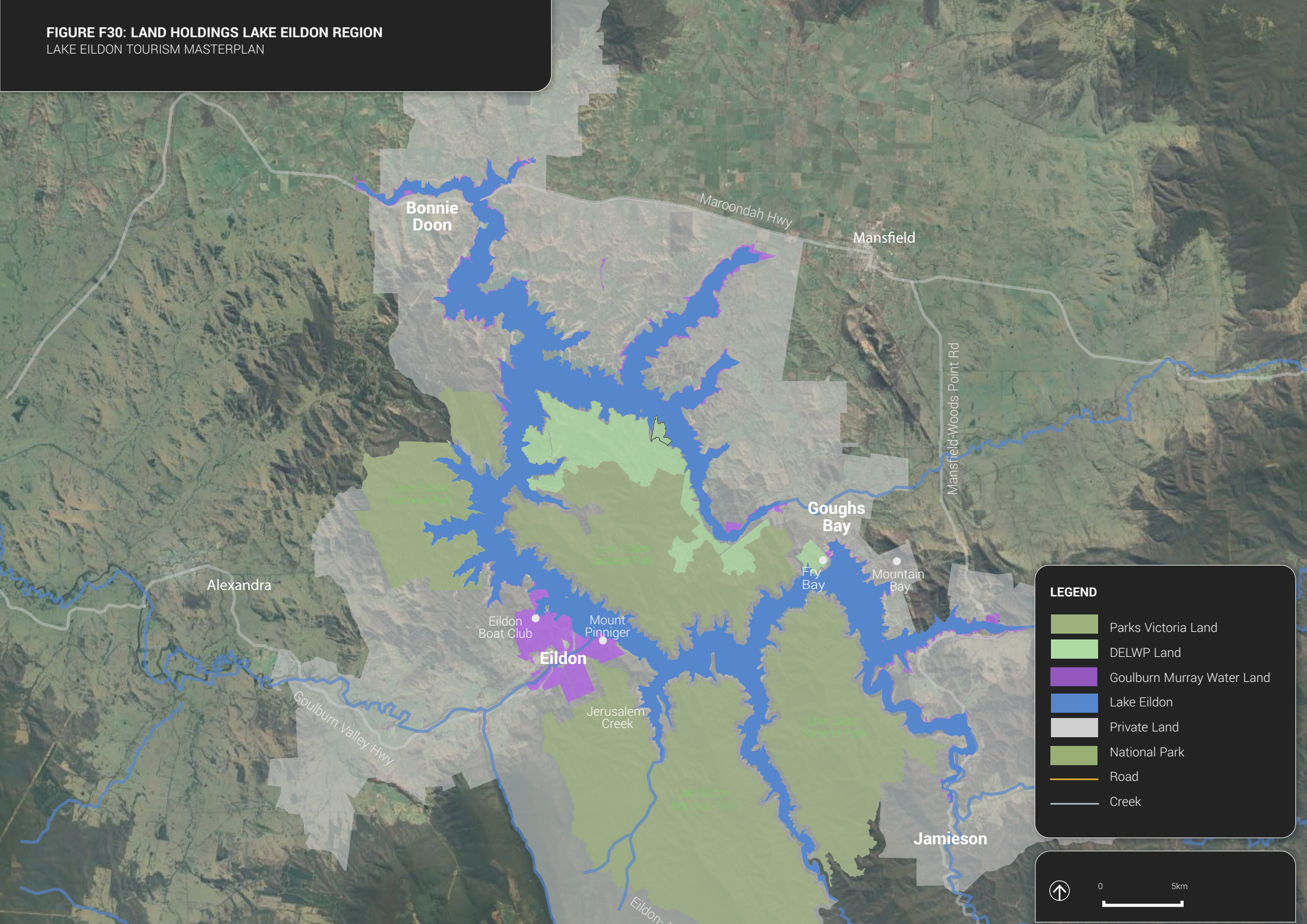
An overview of key land holdings includes:

- Parks Victoria land is confined to the Lake Eildon National Park.
- DELWP manage the land within the Delatite Arm Reserve, and the former plantation site in Goughs Bay (at Fry Bay).
- Goulburn-Murray Water have significant freehold land holdings around the Lake;
- There are a few Council owned properties within the region. These are not identified in the map below.

One of the key issues identified is management of visitors when Lake Eildon water levels are low. Visitors disperse along the lake bed during times of low water levels, making it difficult to regulate visitor activities and ensure protection of the lake bed.

The greatest tourism opportunities are presented by the Goulburn-Murray Water and DELWP land, as they are within suitable zones and the development conditions for these sites are less stringent than Parks Victoria managed Crown Land.

FIGURE F30: LAND HOLDINGS LAKE EILDON REGION
LAKE EILDON TOURISM MASTERPLAN



7.6. GOVERNANCE REVIEW

7.6.1. CURRENT ISSUES WITH GOVERNANCE

Extensive consultation was undertaken with governance organisations to identify issues with governance. The following are considered to be the key issues with governance of the Lake Eildon region:

- **Multiple stakeholders and land managers** – There are multiple stakeholders and land managers leading to inconsistent approaches to tourism servicing, investment and policing of land.
- **No coordinated marketing and branding** – No official organisation responsible for coordinated marketing and branding across both the Murrindindi and Mansfield sides of the Lake.
- **Difficulty facilitating investment on GMW land** – Goulburn-Murray Water do not have adequate resources driving investment facilitation on Goulburn-Murray Water land, they are largely reactive to investors approaching them.
- **Limited resources of land managers** – Parks Victoria, DELWP, GMW – All land management organisations have limited resources dedicated to investment in and maintaining new infrastructure and the environment in the region.
- **No ongoing funding dedicated to improving water access** – Goulburn-Murray Water have no ongoing pool of resources to support improvements and maintenance of boat ramps and other access points.
- **Limited on ground policing in DELWP AND GMW managed land** – There are limited on ground personnel that police and provide services to visitors.
- **No strategic direction with regard to use of public land** – Many of the organisations responsible for public land management have little direction in regard to strategic tourism development.

In order to respond to the needs of a Governance structure, the following are considered as key areas of responsibility for a management organisation for the Lake Eildon region:

- **Land management** –lead the environmental management of land;
- **Facilitating investment** –facilitate private and public sector investment on land;
- **Delivering infrastructure** –deliver infrastructure to support visitation and investment;
- **Visitor servicing** –lead visitor servicing including visitor information provision both pre and during trip;
- **Marketing** – lead regional marketing initiatives; and
- **Event management and activations** – delivery and procurement of event management and activations across the year.

Due to the complexity of having multiple land managers, lack of resourcing of existing land managers and having two Local Government Areas, a new governance structure is required to take responsibility for the above identified areas. A range of Governance options are explored below.

7.6.2. GOVERNANCE OPTIONS

Based on the governance needs within the Lake Eildon region, there are examples of Governance which Urban Enterprise considers are relevant for consideration for the Lake Eildon region, these include:

- Regional or local tourism organisation;
- Statutory management board;
- Committee of Management;
- Delegated committee;
- Improvement to the existing governance model: including MOUs between existing organisations and leveraging further from Tourism North East

REGIONAL OR LOCAL TOURISM ORGANISATION

There are many regional and local tourism organisations that exist across Australia; these include regional tourism boards, regional tourism organisations or a local tourism organisation.

These organisations are primarily responsible for visitor servicing and marketing of destinations.

CASE STUDY: ECHUCA MOAMA TOURISM

Echuca Moama Tourism is the peak regional tourism body of Echuca Moama townships. The organisation is funded by Campaspe and Murray Shires to deliver consolidated marketing and visitor servicing for the twin towns of the Murray River. This presents a relevant case study as the tourism organisation is shared across two Local Governments for a shared outcome. Funding is also driven through industry membership.

Echuca Moama Tourism is governed by a board which provides direction and consists of local tourism industry and Council representatives.

The aim of Echuca Moama Tourism is:

“Together with our members and partner organisations, EMT is responsible for driving increases in visitation, length of stay, yield and visitor experiences by providing destination marketing and the provision of exceptional visitor services.”

- Echuca Moama tourism delivers the following activities:
- Operates the Visitor Information Centre;
- Maintains the visitor website;
- Prepares the official visitor guide;
- Promotes the region through publications and paid advertising;
- Promotes the region through social media;
- Drives publicity through television shows such as postcards;
- Attends Australian Tourism Exchange;
- Supports events development and procurement of events;
- Provides industry training and networking.

STATUTORY MANAGEMENT BOARD

A statutory management board is a board that is established through an Act of Parliament. The key example here is a Resort Management Board (RMB) such as Mt Buller Mt Stirling RMB which is established as the land manager of the Mt Buller Alpine Reserve through the Alpine Resorts (Management Act) 1997.

CASE STUDY: MT BULLER RMB

Mt Buller Mt Stirling Resort Management Board is established through an Act of Parliament and is the land manager for Mt Buller/Mt Stirling Alpine Resort. The organisation has a management board that is appointed by the State Government.

The Mt Buller Mt Stirling Resort Management Board employs a large number of staff and is responsible for delivery of a broad range of services at the Alpine Resort. One of the key differences between an Alpine Resort Board and a Local Government is that the entire alpine resort is Crown land with no freehold land titles. This means that the Alpine Resort Management Board has extensive control of all land assets and that and development by private sector is delivered through leaseholds.

This structure allows for high revenue from land and bed taxes that contribute to the funding of services. The other key area of revenue is through winter gate entry fees.

Overall Mt Buller Mt Stirling Resort Management Board is responsible for delivery of the following:

- Environmental management;
- Management of leaseholds and tenancies;
- Strategic planning and master planning;
- Investment facilitation;
- Infrastructure delivery;
- Management of services including reticulated water and sewer;
- Roads, landscaping and open space maintenance;
- Visitor servicing;
- Transport and access; and
- Marketing and branding.

COMMITTEE OF MANAGEMENT

Crown land can be managed through a committee of management. There are many examples of committees of management in Victoria that are responsible for managing public land including coastal committees, foreshore land committee, recreation facility management committees and tourism management committees.

The Government defines Committees of Management as follows:

- Small committees that manage a reserve for their local community
- Large committees that manage reserves of regional or state-wide significance
- Committees that manage a coastal reserve

The Minister, or the Minister's delegate, formally appoints each member of a committee of management via a written instrument of appointment, in accordance with the Crown Land (Reserves) Act 1978.

Under the Act, a committee of management may undertake the following:

- Manage, improve, maintain and control the land for the purposes for which it is reserved;
- Undertake financial transactions (including, for incorporated committees who have the consent of the Victorian treasurer, borrowing money);
- Enter into contracts;
- Negotiate leasing and licensing arrangements for all or part of the reserve, subject to minister's approval;
- Employ people;
- Exercise all such powers, functions and authorities and carry out all such duties as are conferred or imposed on it by any regulations;
- Maintain records and administer its affairs as a public entity; and
- Report on its finances and other issues as directed by the department of environment, land, water and planning (DELWP) on behalf of the minister.

This would be suitable for some areas of Lake Eildon, however Goulburn Murray Water has large areas of private land that would not be relevant to a committee of management structure.

CASE STUDY: PHILLIP ISLAND NATURE PARKS

One of the most successful examples of a Committee of Management that has delivered exceptional tourism outcomes is the Phillip Island Nature Park. The Phillip Island Nature Park is responsible for the management of almost all crown land on Phillip Island including the popular Summerlands Precinct which is home of the Penguin Parade.

The Phillip Island Nature Park is designated through the Crown Land Act 1978, and the committee of management designated through Section 14 of the same Act.

The Phillip Island Nature Park has substantial funding delivered mainly through gate entry to the Summerland Precinct.

Key responsibilities of Phillip Island Nature Park:

- Environmental management;
- Management of some leaseholds and tenancies;

- Strategic planning and master planning;
- Investment facilitation;
- Infrastructure delivery;
- Visitor servicing;
- Transport and access; and
- Marketing and branding.

7.7. DELEGATED COMMITTEE

There is potential to establish a delegated committee (of some sort) that would deliver key projects for the purpose of economic benefit (including, but not limited to those in the Masterplan. This could be a short lived committee (maybe 2 – 3 years) with clear, agreed deliverables. This committee should be empowered by delegation to activate the key sites.

An example of a delegated committee is the State Government's Regional Review Committee.

7.8. ASSESSMENT OF GOVERNANCE OPTIONS

Table T28 provides an assessment of the governance options considered for the Lake Eildon region.

Establishing a Regional or Local Tourism Organisation could be effective for marketing and visitor servicing but will not address delivery of infrastructure and facilitating investment.

A Resort Management Board has a funding model driven by control of all land and one access point to drive revenue – gate takings and lease of land/ rates. This will not be the case for Lake Eildon.

A Committee of Management provides the best example of an organisation that has multiple revenue points, is responsible for infrastructure and investment, environmental management and has multiple landholdings. However much of the key land assets are private assets owned by Goulburn Murray Water.

It is recommended that in the short term an MOU between Murrindindi Shire, Mansfield Shire, Goulburn Murray Water and Tourism North East be agreed to deliver the short term aspects of the masterplan. This will ensure continued work and effort is delivered to reach the goal of the masterplan. This will identify key roles for delivery of the masterplan.

T28. ASSESSMENT MATRIX

				SERVICES					
Type	Example	Statutory policy requirement	Funding	Land management	Facilitating investment	Delivering infrastructure	Visitor servicing	Marketing	Event management
Regional or Local Tourism Organisation	Echuca Moama Tourism [Incorporated Association]	None	Membership Local Government				✓	✓	✓
Statutory Management Board	Mt Buller Resort Management Board	Alpine Resorts (Management) Act 1997	Gate takings Bed taxes	✓	✓	✓	✓	✓	✓
Committee of Management	Phillip Island Nature Park [Non for Profit Organisation]	Crown Land (Reserves) Act 1978 (Phillip Island Nature Parks)	Sales revenue Grants Leases Government funding (minor)	✓	✓	✓	✓	✓	✓
Delegated Committee	Regional Tourism Review	Delegated by State Government	Government	✓	✓	✓			
MOU between delivery agencies		None	Local Government State Government Agencies Industry	✓	✓	✓	✓	✓	✓

8. SUMMARY OF ISSUES AND OPPORTUNITIES

8.1. INTRODUCTION

This section outlines the key considerations for tourism development in the Lake Eildon region, which will inform the strategic framework and direction of the masterplan.

8.2. GOVERNANCE AND LEADERSHIP

MULTIPLE STAKEHOLDERS AND LAND MANAGERS

The Lake Eildon region has a variety of land owners, land managers and stakeholders which complicates the delivery of visitor services, infrastructure and investment in the region. This issue has been raised numerous times by stakeholders during consultation and is seen as a key constraint to growth in the region.

Key land managers include:

- **Goulburn-Murray Water** – Goulburn-Murray Water is the responsible authority for Lake Eildon up the high water line and includes responsibility for the water body itself and most boating and access infrastructure to the Lake. Goulburn-Murray Water also has large tracts of land that are in freehold title around the lake and in particular around Eildon township.
- **Parks Victoria** – Parks Victoria manage Lake Eildon National Park which is the largest land area surrounding Lake Eildon. Most of the infrastructure and tourism amenity is within the Fraser area of the National Park, with large areas of the National Park largely undeveloped for tourism with very little amenity.
- **Department of Environment, Land, Water and Planning (DELWP)** – DELWP controls a number of State Forrest areas that are popular for camping and recreation. Two of the key areas controlled by DELWP are the Pines and Big River State Forrest.

- **Mansfield Shire Council** – Mansfield Shire Council are managers of some foreshore areas of the lake within townships and control many of the roads, drainage and infrastructure in key towns and villages.
- **Murrindindi Shire Council** - Murrindindi Shire Council are managers of some foreshore areas of the lake within townships and control many of the roads, drainage and infrastructure in key towns and villages.

The variety of land managers as stated above results in the following:

- Lack of coordinated brand and marketing for Lake Eildon;
- Inconsistent approach to visitor servicing;
- Confusion in relation to who is responsible for visitor services;
- Lake infrastructure, foreshore areas and access areas have little ongoing investment and result in poor amenity outcomes for visitors;
- No responsible authority for events and activation across the Lake; and
- Lack of resources dedicated to the above.

In order to create a consistent approach to Lake Eildon destination management, the governance structure of the Lake needs review. There are a number of other structures which could be explored including:

- A Lake Eildon Regional Tourism Organisation;
- A new funded statutory authority;
- Memorandum of understanding between organisations; and
- A Lake Eildon Masterplan Delivery Action Group.

LACK OF MARKETING AND BRAND

There is no organisation that has sole responsibility for marketing the entire Lake Eildon region. Fragmentation between two Council areas and historically two Regional Tourism Boards has resulted in limited resources being dedicated to

promoting Lake Eildon. There also remains no recognised brand for the Lake Eildon region.

OPPORTUNITY TO UTILISE GMW FREEHOLD LAND AND PROVIDE GUIDANCE OF IT'S USE

Goulburn-Murray Water own a substantial amount of freehold land surrounding Lake Eildon and in particular around Eildon township. There is no strategic assessment that exists in terms of the utilisation of this land. There is opportunity for this study to provide direction in terms of future use of Goulburn-Murray Water land and the most suitable use for land.

These landholdings may require rezoning and access to services to support future investment, however the first step is to identify most appropriate use of this land based on demand for tourism, residential, recreation and commercial activity. Aspects of this is considered within the Structure Plan for Eildon, however this project can consider specific projects and use of this land based on the extensive research undertaken.

8.3. SETTLEMENT, PROPERTY AND SUPPORTING INFRASTRUCTURE

POORLY PLANNED SETTLEMENT PATTERN

There was very little strategic planning undertaken when identifying and laying out townships, villages and settlements across the Lake Eildon region. Most towns were established as private subdivisions of land with very little consideration of public sector amenity, open space, community services and commercial activity.

NEED FOR SETTLEMENT HIERARCHY AND PRIORITISED INVESTMENT

There are many settlements located around Lake Eildon that have poor access, poor infrastructure, limited capacity for growth and do not have access to water year round. Urban Enterprise proposes that focused investment should be made towards those towns and villages that have best access to water in order to strengthen Lake Eildon by establish three key water based destinations. These towns that have the

highest capacity for growth based on current settlement patterns, access and amenity are Goughs Bay, Eildon and Bonnie Doon (Peppin Point). Whilst Bonnie Doon is limited in terms of year round access to water for recreation, Peppin Point presents a strong opportunity.

POOR AMENITY AT WATER ACCESS DESTINATIONS

There are a number of key destinations that are popular for accessing water based on their access to high water. These include Goughs Bay, Peppin Point and Alliance Boat Ramp at Eildon.

These locations should be considered for prioritised investment in boat ramp improvements, foreshore parks, summer time activation, mooring facilities, public toilets and commercial activation.

LACK OF ZONED LAND TO SUPPORT DEVELOPMENT

There is a need to consider rezoning of land in specific locations to support investment. This includes locations that boast special views, access to townships and infrastructure. Key areas which are restrictive on tourism development are:

- Farming Zone – and in particular the minimum subdivision size of 40 hectares;
- Public Conservation and Recreation Zone – Limited uses that can be accommodated from a tourism perspective.
- Commercial Zones in town centres – Lack of commercial zoned land within Lake Eildon villages town centres.

LACK OF RETICULATED WATER AND SEWER AND LIMITED CAPACITY OF EXISTING SYSTEMS

Within the Lake Eildon region, only Bonnie Doon and Eildon townships have reticulated water and sewer. In addition the capacity within these two townships to service additional growth is limited with expansion of the waste water treatment plants in both locations required should there be any additional demand generated.

Goughs Bay which is one of larger settlements in the Lake Eildon region has no reticulated water or sewer capacity.

In addition Jerusalem Creek would benefit from the proposed sewerage pipeline to Eildon for environmental and investment outcomes.

Key projects to be considered, which would support investment and growth in the region as well as environmental outcomes include:

- Mansfield to Goughs Bay Sewerage Pipeline;
- Eildon to Jerusalem Creek Sewerage Pipeline;
- Peppin Point Sewerage Scheme; and
- Blue Gums Precinct to Eildon Sewerage Pipeline.

INCONSISTENT WATER LEVELS AND ACCESS TO DEEP WATER

Lake Eildon water levels are inconsistent across the course of the year as a result of varying rainfall and the need to provide water to downstream irrigators. This means many of the villages and access points to Lake Eildon are left without any water for recreation and tourism purposes. This obviously impacts on visitation and economic activity in these areas. Bonnie Doon, Jamieson, Howqua and Macs Cove often go through extended periods of time with no water.

LOW AND DECLINING POPULATION AND WORKFORCE

The demographic analysis shows that the population of the Lake Eildon region is only 3500 residents. This limits local workforce required to support tourism activity in and around the lake. Access to labour was identified as major challenge for businesses located around Lake Eildon. Many businesses draw heavily on locations such as Mansfield and Alexandra for the workforce, particularly during peak periods of the year. The low population base has an additional impact on business sustainability with a small local population base for businesses to service.

LOW SOCIO-ECONOMIC RESIDENTIAL DEMOGRAPHIC

A number of the Lake Eildon towns and villages score very low on socio-economic disadvantage. This impacts on the ability to source a local workforce to service visitors, leads to the need for greater community service provision and support and also reduces the resident expenditure pool.

8.4. PRODUCT DEVELOPMENT AND INVESTMENT

LIMITED INVESTMENT IN NATURE-BASED EXPERIENCES

Results from a survey of visitors to the Lake Eildon highlight the importance of nature based tourism as a key driver of visitation to the region. However there has been limited investment in nature based experiences including development of tracks trails, tour activities, nature based accommodation and active outdoor recreation. The masterplan needs to consider investment in nature based activities that will grow visitation in lifestyle leader markets and strengthen visitation outside of the warmer months.

LOW LEVELS OF FIXED COMMERCIAL ACCOMMODATION AND LACK OF INVESTMENT IN CONTEMPORARY ACCOMMODATION

The region has attracted almost no investment in visitor accommodation over the past 30 years. This is a major barrier to growing visitor yield and attracting lifestyle leader markets to the Lake Eildon region. The majority of visitors are 'Habituals' staying predominantly in caravan parks or camping in reserves. Investment in major holiday leisure resort would create a major impact on visitation in the region.

LIMITED FOOD AND BEVERAGE EXPERIENCES

Food and beverage tourism experiences are almost non-existent in the region. There has been reinvestment in Bonnie Doon Hotel, Jamieson Hotel and a new café in Bonnie Doon. Other than these there is a major lack of contemporary food and beverage experiences in the Lake Eildon region.

This masterplan should encourage investment in food and beverage experiences that support visitation and also become destinations in themselves.

LIMITED WATERFRONT INVESTMENT

The Lake Eildon region has attracted little investment in waterfront visitor accommodation or dining experiences. Goulburn-Murray Water and DELWP have sites that may be conducive to waterfront investment. This needs to be explored through the masterplan.

OPPORTUNITY TO LINK BONNIE DOON AND EILDON

Bonnie Doon and Eildon are only separated by 33kms via the Skyline Road. This link presents a significant opportunity to strengthen visitation to Lake Eildon and encourage dispersal of visitors. The Skyline Road is one of the most scenic roads in Victoria, with views across Lake Eildon to the High Country.

LIMITED FAMILY FRIENDLY PRODUCT

One of the key markets for Lake Eildon are family groups. Other than water based activities there is very limited experiences on offer for the family market. This masterplan should explore product that is family friendly and will assist in engaging this sector to encourage expenditure and extend length of stay.

LOW VISITOR YIELD AND HIGH SEASONAL VARIABILITY

Visitation to Lake Eildon is highly seasonal, due mainly to the attract of Lake Eildon for water based activities. Visitation peaks in the region during summer school holidays and long weekends. There is very little visitation during the winter in the Lake Eildon region. There is a need to focus investment on products and experiences that are not water based – this includes food and beverage experiences and nature based experiences.

NO CENTRALISED ONLINE VISITOR INFORMATION SOURCES

There is no consolidated online source providing information to visitors about the Lake Eildon region. Lake Eildon Tourism (LakeEildon.com) is the main source of information, however as the organisation relies on business buy in which has been limited to date, the information available is not comprehensive. There is also no booking functionality available through the site.

This is often a deterrent for casual visitors to the region (i.e. not Habitual visitors), as it is difficult to source relevant and up to date visitor information online prior to visiting the region.

LIMITED WATER CRAFT AND RECREATION EQUIPMENT HIRE

There are very few locations for visitors to the region to hire water-based and land-based recreation equipment and facilities (such as boats, kayaks, jet skis, bikes, fishing equipment etc.), as well as very little opportunity to book online prior to a trip. This excludes a large proportion of the market from engaging with and experiencing the key product strengths of the region.

LACK OF LARGE SCALE TOURISM BUSINESSES

There are very few large scale tourism businesses that operate in the Lake Eildon region. The only two non-public sector entities that have significant scale in the region are Holmesglen TAFE and Outdoor Education Group. The lack of large scale and high profile accommodation businesses and food and beverage businesses in the region results in limited resources being delivered into private sector marketing initiatives. The lack of large scale businesses also impacts on the capacity of the region to support large numbers of visitors.

Investment in pubs, cafes, restaurants and commercial accommodation would greatly support the current visitor base and grow visitor expenditure and yield.

PART B. MASTERPLAN

9. MASTERPLAN FRAMEWORK

9.1. INTRODUCTION

This section provides an overview of the vision, overarching strategic themes, objectives for tourism development and projects which will support the long term vision for the Lake Eildon region.

9.2. VISION

The Lake Eildon region will fulfil its potential as Australia's premier inland water destination, with enhancement of its water-based tourism assets, activation of nature-based tourism, and improvement to the visitor experience in the key destination villages surrounding the Lake.

9.3. STRATEGIC OBJECTIVES

The following are strategic objectives that respond to the issues and opportunities identified through preparation of the masterplan:

- Attract Lifestyle Leader market segments to the region;
- Improve the experience of current water based and nature based visitors;
- Grow visitor yield through investment in accommodation, food and beverage product and nature based tours and experiences;
- Improve the general amenity of the region and in particular the key towns and villages;
- Focus investment to create a critical mass of product at key visitor nodes;
- Support improved activation and access to the Lake;
- Deliver improved governance and management of visitor services, tourism infrastructure, marketing and investment attraction.

9.4. STRATEGIC FRAMEWORK

The following themes for tourism investment have been developed, in line with the vision and strategic objectives for the Lake Eildon region.

T1: IMPROVE THE EXPERIENCE FOR EXISTING VISITOR MARKETS

Focus: Improve the visitor experience for existing visitor markets through infrastructure and amenity improvements, and investment in contemporary product.

T2: NEW PRODUCT TO REACH TARGET MARKETS

Focus: Deliver new contemporary products that are unrelated to water-based activities to grow year round visitation and attract new visitor markets.

T3: INVESTMENT IN ENABLING INFRASTRUCTURE

Focus: Deliver enabling infrastructure that will unlock investment potential at strategic locations.

T4: IMPROVED DESTINATION MANAGEMENT

Focus: Deliver improved governance and resources to facilitate visitor servicing, activation and marketing.

9.5. PERFORMANCE MEASURES 2020-2025

The following performance measures have been developed to allow the progress of key actions in the plan to be tracked over time. This is a key area where other plans for Lake Eildon have failed, as a wide range of strategies and actions were suggested, with no means of measuring their implementation.

The following performance measures have been developed as key indicators to track the progress of the Lake Eildon Masterplan.

- Grow visitor spend per person from \$153 to \$200 by 2025 [Data sourced from intercept surveys of Lake Eildon]
- Grow overnight stays by an additional 250,000 visitors, from 775,674 to 1,034,821 in 2025 [Data sourced from Urban Enterprise PAVE model and visitation projections]

9.6. PROJECT ASSESSMENT CRITERIA

Numerous projects have been identified through the research phases of this study. Some of these are projects that have long standing need, others are new ideas generated which address the strategic issues and opportunities of the region.

Projects have been assessed to identify prioritisation of resources, funding and effort. This includes defining into the following categories:

BUSINESS CASE PROJECTS

Four large projects have had business cases prepared for them. These projects align to the project assessment criteria and have the following attributes:

- Large scale project;
- Large economic impact;
- Can be delivered within short time frame;
- Require substantial funding.

TIER 1 – REGIONAL IMPACT PROJECT

Tier 1 projects are large scale projects that align well to the project assessment criteria. These projects may require substantial funding, however may also have major constraints that impact on the short term deliverability. These projects have the following attributes:

- Large scale project;
- Large economic impact;
- Potential constraints leading to longer timeframe for delivery;
- Requires substantial funding.

TIER 2 – SUBREGIONAL IMPACT PROJECT

Tier 2 projects are smaller scale projects that may also service community need. Their impact is more localised. These projects have the following attributes:

- Smaller scale projects;
- Localised impacts;
- Potential community projects that will facilitate tourism outcome.

PROJECT ASSESSMENT CRITERIA

The following assessment criteria has been used to prioritise projects. Projects which meet the greatest number of these criteria have been identified to be developed as Business Case projects or Tier 1 level projects.

5. **Large scale project scale/game changer.** The project will produce a significant change to the current experience of tourism in the Lake Eildon region, either through attraction of new visitor markets or investment in unique, large-scale tourism product.
6. **Enabling infrastructure and investment.** The project will act as a catalyst for further public and/or private sector investment, through either delivery of infrastructure or product that will unlock development potential.
7. **Expands regional product offer.** Creates new experiences which are not available in the region, and enhances the perception of Lake Eildon as a nature-based destination rather than just a water-based destination.
8. **Improves awareness and perception of the region.** Project builds awareness/positively influences perception of Lake Eildon.
9. **Aligns to high-value target markets.** Projects that positively influence the perception of Lake Eildon as a desirable visitor destination for high-value target markets.
10. **Increases visitor yield.** Extracts greater yield from existing visitor markets, and develops a product offering to attract yield from new target markets.
11. **Seasonal dispersal.** Draws visitors outside of peak periods, helping to create a more sustainable tourism industry for the region.
12. **Increases visitation.** Increases visitation through motivating new visitors, converting daytrip to overnight visitors, and increasing overnight visitor's length of stay.
13. **Improves community liveability and lifestyle attractiveness.** Creates visitor outcomes which positively impact on the local community's liveability and also improve lifestyle amenity for potential new residents.

9.7. MASTERPLAN CONCEPTS

There are a range of opportunities for the Lake Eildon region, and more specifically for key townships of Eildon, Goughs Bay and Bonnie Doon, that have been identified throughout the preparation of the report. Broad concept plans for each region have been developed and can be found below.

The following projects have been identified as 'game-changers' for the Lake Eildon region, as they fill a critical product or experience gap in the region, and will help to support further investment in tourism. These projects each have individual Business Cases, to provide strategic justification for investment. These projects include:

- **Premier Nature-Based Precincts at Mt Pinniger (Eildon) and Fry Bay (Goughs Bay).** Development of nature-based precincts will create visitor destinations with high-quality trails and treetop experiences, outdoor activities, integrated dining facilities at key vantage points, low-impact eco-accommodation, and development of iconic walking trails.
- **Skyline Road Tourist Precinct.** Capitalising on the immersive views of Lake Eildon from Skyline Road, the development of the Skyline Road Tourist Precinct will include formalisation of the Great Lake Touring Route, boutique food and dining experiences, architectural look out points, and experiential accommodation overlooking Lake Eildon.
- **Large-scale Accommodation Investment.** The development of large-scale accommodation in Goughs Bay and Eildon will fulfil a critical gap in commercial accommodation and conferencing and events facilities, appeal to a broad market, and provide key entertainment, dining and leisure facilities that are currently lacking within the region. Large-scale integrated accommodation will also promote off-peak visitation to the region.
- **Sewerage System Investment.** Investment in sewerage infrastructure will help to build the visitor nodes of Goughs Bay and Jerusalem Creek into key visitor destinations, by unlocking development potential through the removal of infrastructure barriers that can often deter potential investors, as well as improving environmental outcomes.

Further detailed is provided on each of the masterplan concepts, including business case and tier 1 and 2 projects in the following section.

FIGURE F31: LAKE EILDON REGION MASTERPLAN
LAKE EILDON TOURISM MASTERPLAN

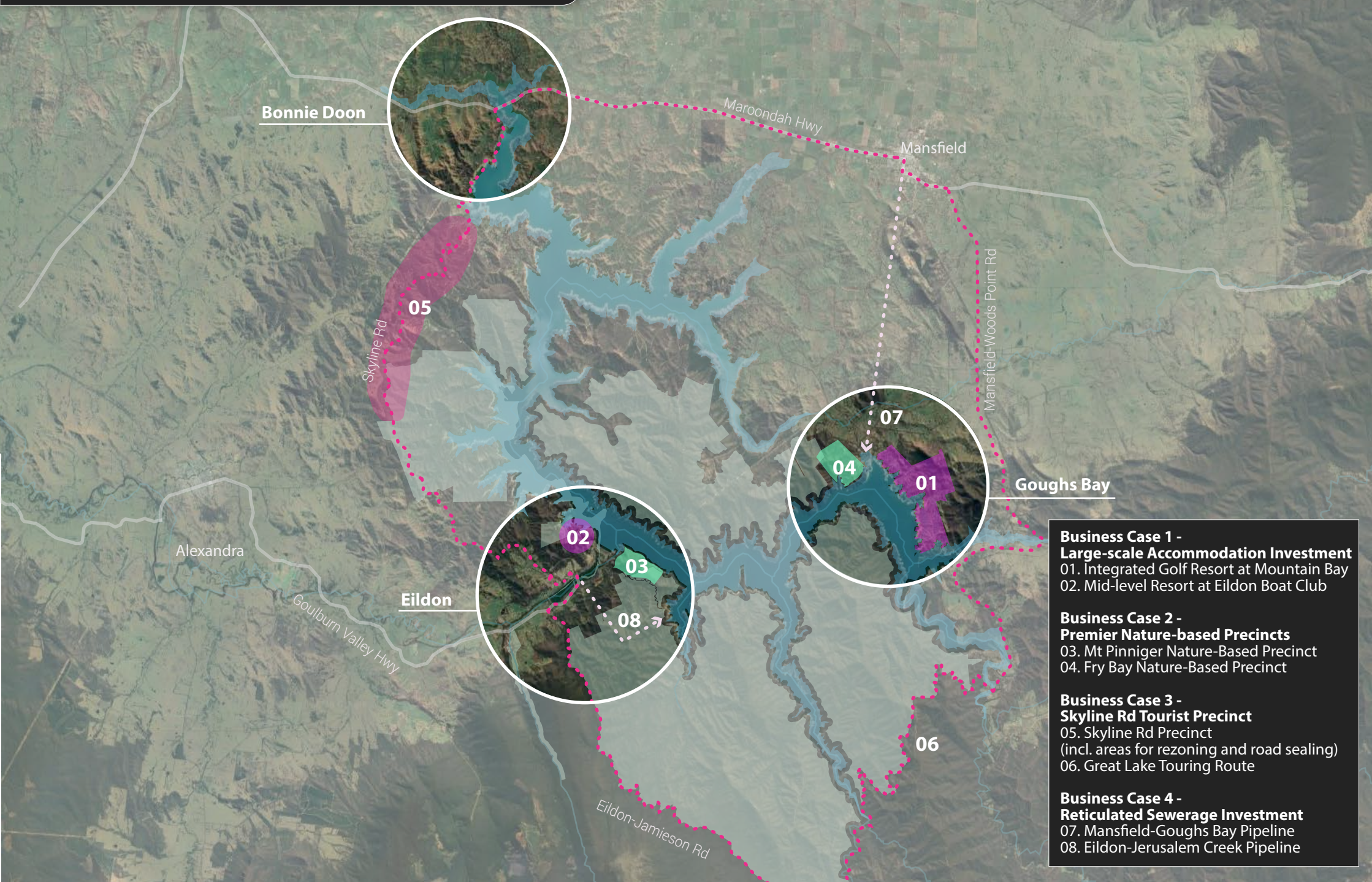
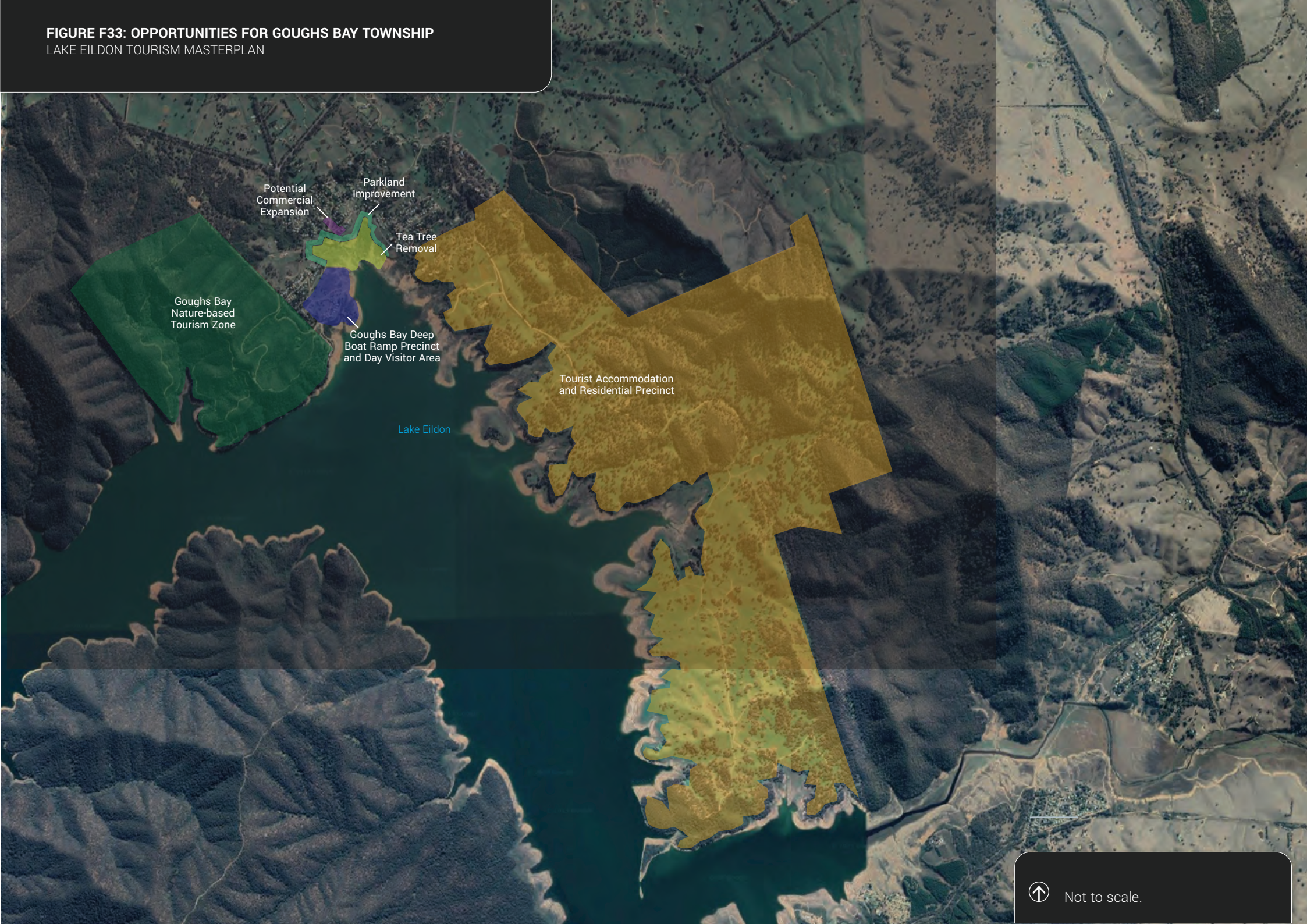


FIGURE F32: OPPORTUNITIES FOR EILDON TOWNSHIP
LAKE EILDON TOURISM MASTERPLAN



FIGURE F33: OPPORTUNITIES FOR GOUGHS BAY TOWNSHIP
LAKE EILDON TOURISM MASTERPLAN



Not to scale.

FIGURE F34: OPPORTUNITIES FOR BONNIE DOON TOWNSHIP
LAKE EILDON TOURISM MASTERPLAN



9.8. BUSINESS CASE 1 – LARGE-SCALE ACCOMMODATION INVESTMENT

There is a gap in quality, large scale accommodation with Lake views in the Lake Eildon Region. This Business Case will focus on two large scale accommodation investment opportunities for Lake Eildon, detailed below.

INTEGRATED GOLF RESORT AT MOUNTAIN BAY

There is opportunity to develop an integrated golf resort at Mountain Bay. The proposal includes the following features:

- A 150 room accommodation establishment;
- A dining facility able to be used as a restaurant and hired for private events;
- 18-hole golf course, swimming pool, tennis courts and boat ramp. The development will also have the capacity to host conferences and events, which are lacking in Mansfield Shire.

Project Cost: \$124.7 million.

Location: Mansfield and Goughs Bay townships, Mansfield Shire.

Delivery Agency: Private sector.

Cost benefit:

- Cost benefit from direct impacts: 2

Short-term Construction Impact:

- Construction impact of \$270.2 million
- 737 construction jobs

Ongoing Impact:

- Ongoing impact of \$99.3 million output to the Hume region
- 519 ongoing jobs

MID-LEVEL RESORT AND RESIDENCES AT EILDON BOAT CLUB

There is opportunity to develop an mid-level resort and residences at Eildon Boat Club. The resort is proposed to be a contemporary, 4 star accommodation establishment with 80 rooms. It is proposed that part of the development could be strata-titled, to enable private ownership of some rooms and to ensure commercial viability of the development.

A food and beverage establishment is proposed to be developed at the resort, which will be able to service accommodation visitors, and the high number of boating and fishing visitors around Eildon.

Project Cost: \$40 million.

Location: Mansfield and Goughs Bay townships, Mansfield Shire.

Delivery Agency: Private sector.

Cost benefit

- Cost benefit from direct impacts: 2.5

Short-term Construction Impact:

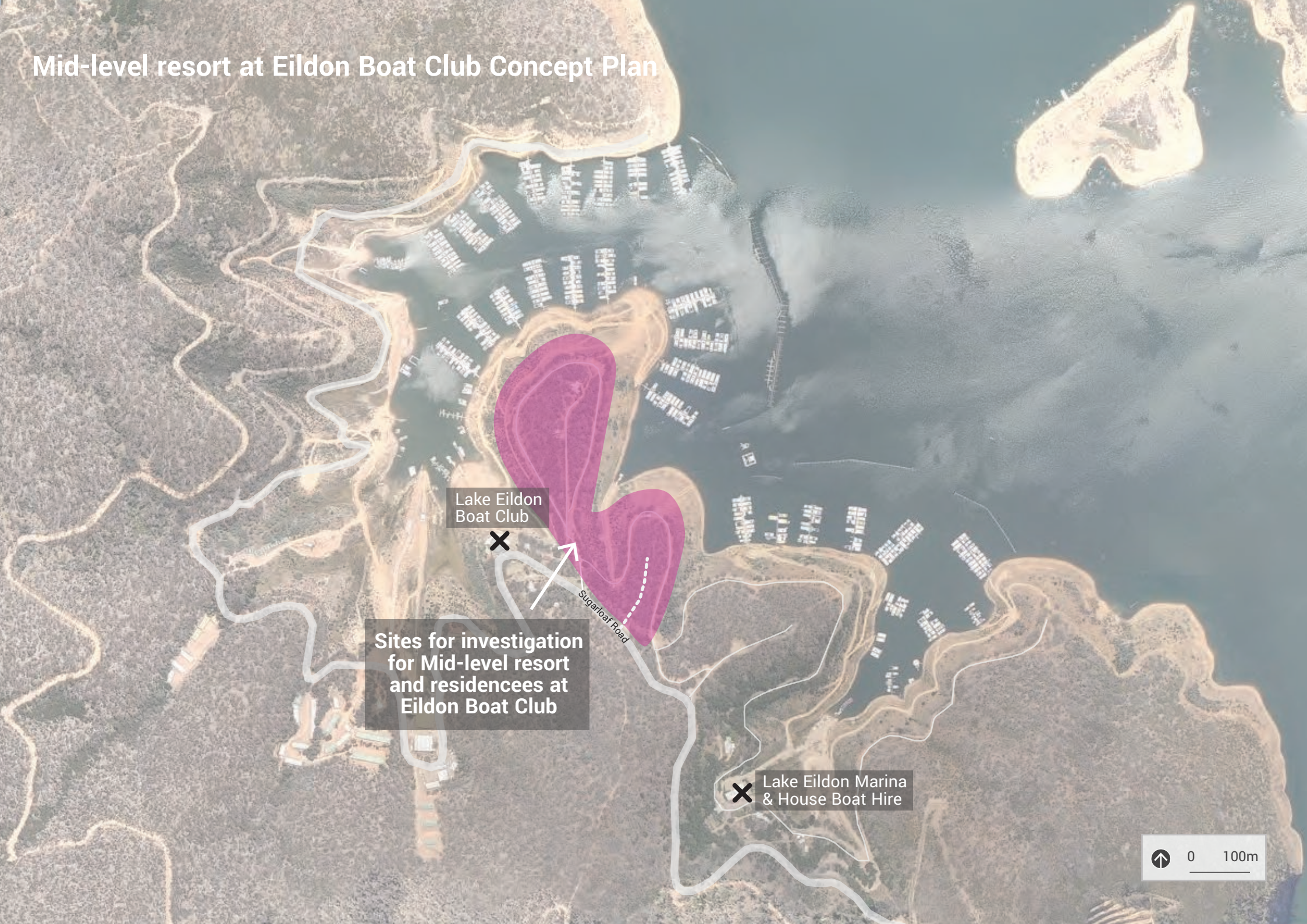
- Construction impact of \$86.7 million output to the Hume region
- 236 construction jobs

Ongoing Impact:

- Ongoing impact of \$45.3 million output to the Hume region
- 236 ongoing jobs



Mid-level resort at Eildon Boat Club Concept Plan



Lake Eildon
Boat Club

Sites for investigation
for Mid-level resort
and residencees at
Eildon Boat Club

Sugarloaf Road

Lake Eildon Marina
& House Boat Hire

9.9. BUSINESS CASE 2- PREMIER NATURE-BASED PRECINCTS

Investment in nature based tourism was seen as key to attracting new visitor markets to Lake Eildon and also providing new experiences for existing visitor markets. There is opportunity to strengthen the visitor nodes of Goughs Bay and Eildon township by establishing premier nature based precincts in proximity to the town centres.

This business case will focus on the development of Premier Nature-based Precincts at Mt Pinniger in Eildon and Fry bay in Goughs Bay. The development of nature-based precinct at these locations will create a visitor destination for current and future visitors, capitalising on the natural views and providing an additional attraction for visitors to region.

Cumulus Studio Architects have prepared concept images for both precincts, shown below. More detail on these projects can be found in the individual business case.

MT PINNIGER NATURE-BASED PRECINCT

The project will deliver a number of interventions, including:

- Iconic architectural lookout;
- Café/restaurant with views of Lake Eildon;
- Walking trail from Eildon township, with potential for signage and Indigenous interpretation along the trail length;
- Glamping development with 12 glamping tents.

Project Cost: \$16.2 million.

Government Funding Ask: \$5.2 million for walking trail and iconic lookout structure.

Location: Mt Pinniger in Eildon, Murrindindi Shire.

Delivery Agency: Public-Private

Cost benefit:

- Cost benefit from direct impacts: 2.5

Short-term Construction Impact:

- Construction impact of \$35.1 million output to the Hume region

- 96 construction jobs

Ongoing Impact:

- Ongoing impact of \$22.9 million output to the Hume region
- 119 ongoing jobs

FRY BAY NATURE-BASED PRECINCT

The project will deliver a number of interventions, including:

- Low-impact eco-retreat accommodation overlooking the Lake, with 20 suites/pods and a general hub building.
- Iconic architectural lookout;
- Walking trail from Goughs Bay township to lookout and accommodation development,
- Mountain Bike trails.

Project Cost: \$23.9 million.

Government Funding Ask: \$1.9 million for mountain bike trails, walking trail and lookout structure.

Location: Fry Bay in Goughs Bay, Mansfield Shire.

Delivery Agency: Public-Private

Cost benefit

- Cost benefit from direct impacts: 1.5

Short-term Construction Impact:

- Construction impact of \$51.7 million output to the Hume region
- 141 construction jobs

Ongoing Impact:

- Ongoing impact of \$14.1 million output to the Hume region
- 73 ongoing jobs





9.10. BUSINESS CASE 3 - SKYLINE ROAD TOURIST PRECINCT

PROJECT OVERVIEW

Capitalising on the immersive views of Lake Eildon and the High Country from Skyline Road, the development of the Skyline Road Tourist Precinct will provide a new iconic touring experience in the region. If sealed, the road would strengthen the link between the two largest towns of Lake Eildon: Eildon and Bonnie Doon.

Key features of the concept include:

- Road sealing of approximately 18 kms of road between Eildon-Bonnie Doon;
- Development of a Great Lake Touring Route, including development of architectural lookouts at key vantage points;
- Rezoning of land to accommodate commercial tourism development with views; and
- Development of a boutique distillery with small scale boutique accommodation.

Cumulus Studio Architects have prepared concept images investment in a distillery and accommodation establishment with immersive views of Lake Eildon, shown below Figure F39.

More detail on this project can be found in the individual business case.

PROJECT DETAILS

Project Cost: \$25 million.

Government Funding Ask: \$7 million.

- Planning Scheme Amendments cost of \$500,000.
- Road sealing cost of \$6.5 million, with the following preliminary costs per Shire:
 - Mansfield Shire road sealing cost estimated at \$2.9 million based on approximately 8 kms of road sealing required.
 - Murrindindi Shire road sealing cost estimated at \$3.6 million based on approximately 10 kms of road sealing required.

Location: Mansfield and Goughs Bay townships, Mansfield Shire.

Delivery Agency: Public-Private

Cost benefit

- Cost benefit from direct impacts: 4.6

Short-term Construction Impact:

- Construction impact of \$54 million output to the Hume region
- 148 construction jobs

Ongoing Impact:

- Ongoing impact of \$52.6 million output to the Hume region
- 275 ongoing jobs



9.11. BUSINESS CASE 4 – SEWERAGE SYSTEM INVESTMENT

The lack of township sewerage systems prohibits investment in key townships and contributes to pollution of Lake Eildon. Goughs Bay has no township sewerage system or reticulated sewer and there is no sewer pipeline connection from Jerusalem Creek to Eildon.

Two pipelines have been identified as critical to support investment, enhance the visitor economy and improve liveability of the Lake Eildon region. These are:

- Jerusalem Creek- Eildon Pipeline
- Mansfield – Goughs Bay Pipeline

This business case focus on investment in the two identified pipelines. The business case presents the tourism benefits provided by sewerage infrastructure investment.

More detail on these projects can be found in the individual business case.

EILDON-JERUSALEM CREEK PIPELINE

Project Description: Delivery of a 6.4 km sewer pipeline connecting Jerusalem Creek and Eildon.

Project Cost: \$7 million.

Location: Eildon and Jerusalem Creek, Murrindindi Shire.

Delivery Agency: Goulburn Valley Water

Cost benefit

- Cost benefit from direct impacts: 12.2

Short-term Construction Impact:

- Construction impact of \$15 million output to the Hume region
- 41 construction jobs

Ongoing Impact:

- Ongoing impact of \$50 million output to the Hume region

- 260 ongoing jobs

MANSFIELD TO GOUGHS BAY PIPELINE

Project Description: Delivery of an 18km pipeline connecting Goughs Bay with Mansfield.

Project Cost: \$15.2 million.

Location: Mansfield and Goughs Bay townships, Mansfield Shire.

Delivery Agency: Goulburn Valley Water.

Cost benefit

- Cost benefit from direct impacts: 15.9

Short-term Construction Impact:

- Construction impact of \$32 million output to the Hume region
- 90 construction jobs

Ongoing Impact:

- Ongoing impact of \$185 million output to the Hume region
- 1,027 ongoing jobs

9.12. LAKE EILDON MASTERPLAN PRIORITY TIER 1 PROJECT PROFILES

The following projects have been identified as Tier 1 Priority projects for the Lake Eildon region, which will have significant impact on the Lake Eildon region economy.

INVESTIGATE NEW LAKE EILDON GOVERNANCE ARRANGEMENT

Part A: MOU between key agencies for short term delivery of masterplan

Part B: Feasibility study into governance options

Project Cost: \$50,000 for detailed study

Location: Lake Eildon

Project Description:

A detailed review of the current governance structure of the Lake Eildon region should be undertaken as a priority for the future development of Lake Eildon as a visitor destination. This should include an assessment of the existing stakeholders and their roles, a detailed investigation of land ownership and possible land divestment, and suggest recommendations for an improved governance arrangement.

The aim of this project is to develop a governance arrangement that will provide leadership for the region and assist with long-term delivery of the Masterplan.

Strategic Justification:

- Improved destination management
- Improved visitor servicing capacity
- Targeted investment attraction

Delivery Agency: Masterplan Project Steering Group

Project Actions:

- Undertake a detailed review of the current governance structure.

- Undertake a thorough land divestment strategy, that may include land swaps and sale of assets.
- Seek legal advice in relation to the establishment of a new governance organisation for the Lake Eildon region

LAKE EILDON BRAND AND MARKETING STRATEGY

Project Cost: \$80,000 for branding and marketing strategy

Location: Lake Eildon

Project Description:

The Lake Eildon region has long suffered from a lack of unified vision and priorities, as well as inconsistent marketing and branding across the two Shires.

A marketing and branding strategy should be developed to create a clear vision and strategic direction for the Lake Eildon region.

Strategic Justification:

- Need for streamlined marketing and promotion of one brand for Lake Eildon
- Improved destination management
- Improved visitor servicing focus
- Attracting new markets through improved marketing reach

Delivery Agency: Tourism North East

Project Actions:

- Seek funding
- EOI for branding and marketing strategy for Lake Eildon

TOWNSHIP AMENITY IMPROVEMENTS

Project Cost: \$150,000 for masterplan design (\$50k per town)

Location: Key towns of Bonnie Doon, Eildon and Goughs Bay.

Project Description: Township presentation improvements are required in the key towns, including signage upgrades, improved landscaping, public furniture, development of township gateways, façade treatments and removal of outdated signage.

These improvements have significant outcomes, as they improve the attractiveness of the town for residents and visitors alike.

Strategic Justification:

- Town centres are unattractive, have poor landscaping, dated signage and no township gateways
- Improved town presentation will drive stop overs and longer stays in townships
- Township amenity improvements will Increase town attractiveness to current and prospective residents

Delivery Agency: Murrindindi and Mansfield Shire Councils respectively

Project Actions: Fund development of landscape masterplan for each town.

Case Study: Alpine Better Places, Alpine Shire Council

The project aims to improve township amenity and liveability. Development of concept and landscape plans for key towns Bright, Myrtleford and Porepunkah. Landscaping and civil works were undertaken to improve the presentation and attractiveness of towns.

EILDON NATURE-BASED RECREATION PRECINCT

Project Cost: \$50,000 for feasibility study

Location: Eildon

Project Description:

A nature based hub which provides a service centre for accessing information, booking tours, hiring water craft.

The concept is a precinct based approach located next to the Eildon Pondage and has the potential to include the following:

- Visitor information services;
- Booking services;
- Hire facilities;
- Offices for local agencies and organisations;
- Outdoor adventure activities as an entre to the regional experience (e.g.: artificial rock climbing wall);
- Bike hub including bike hire, pump track and trail head.

Strategic Justification:

- Need to strengthen the presence of outdoor recreation in Eildon
- Provide a logical hub where visitors can access outdoor recreation experiences;
- Need for a trail head for walks and mountain bike trails;
- Reinforce the nature based role of Eildon township.

Delivery Agency: GVW/ Parks Victoria/ New Governance Organisation

Project Actions: Feasibility Study

PRIMARY LAKESIDE VISITOR PRECINCTS

- **Alliance Boat Ramp (Eildon)**
- **Jerusalem Creek**
- **Goughs Bay Boat Club**

Project Cost: \$4 Million

Potential locations:

Alliance Boat Ramp, Eildon

Jerusalem Creek Marina, Jerusalem Creek

Goughs Bay Boat Club, Goughs Bay

Project Rationale:

The amenity and infrastructure at Lake Eildon's key access points requires significant improvement to improve the visitor experience.

Locations that have access to the lake during low water levels should be prioritised for improvement.

Project Description

Delivery of a facilities and improved amenity at key lakeside visitor destinations, including:

- Improved boat ramps;
- Mooring facilities;
- Foreshore amenity improvements;
- Toilets;
- Peak period activations;
- Commercial tenancies;
- Inflatable water play.

Project Actions: Detailed precinct masterplans

Examples of potential activations at Primary Lakeside Visitor Precincts are shown below.

Redfin Point Café is a proposed café development at the Alliance boat ramp in Eildon. The proposal aims to service day visitors to the region and provide a hub for a range of activities and facilities, such as guided tours, boat hire and other equipment hire.

The summer pop-up on the Seine River in Paris is an example of temporary activations that can improve waterside destinations.

Redfin Point Cafe - Artists Impression



Redfin Point Cafe - Artists Impression Image Credit: FMSA, Source: Mark Howard

Summer Pop Up – Seine River



Source: Summer pop up, Seine River, Paris

GOLDEN TROUT BISTRO AND VISITOR ACCOMMODATION

Project Cost: \$5 Million

Location: Eildon

Project Rationale:

The Golden Trout Hotel is located a key position within Eildon township, it forms the gateway of the town and sits between the pondage and the town centre.

It sits on rare freehold land on the Eildon Pondage.

The former hotel site has been disused and is in a state of disrepair and requires significant reinvestment to reinstate the hotel.

There is a anecdotally significant demand for a pub in Eildon as well as a late night food and beverage venue.

Project Description

Delivery of a signature food, beverage and accommodation venue on the Eildon Pondage.

Project Actions: Promote sale of the site to investors through a Lake Eildon investment portal.

9.13. LAKE EILDON MASTERPLAN PROJECTS

T29. BUSINESS CASE PROJECTS

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	High-level Actions (Detailed further in Business Cases)	Economic Impact Level
Business Case 1 – Large-scale Accommodation Investment								
Integrated Golf Resort at Mountain Bay	New integrated 150 guest room accommodation with golf course, tennis courts, restaurant and conference space, and boat mooring.	New product to reach new markets	Mountain Bay	\$3 million	\$126.4 million	Private Sector / Mansfield Shire	<ul style="list-style-type: none">- Design- Seek investor- Delivery	High
Mid-level Resort and Residences at Eildon Boat Club	Contemporary 4 star resort with restaurant, partly strata-titled to allow private ownership and increase commercial viability.		Eildon	\$1.5 million	\$40 million	Private Sector / Murrindindi Shire	<ul style="list-style-type: none">- Design- Seek investor- Delivery	High
Business Case 2 – Premier Nature-based Precincts								
Mt Pinniger Nature-Based Precinct	A high quality nature-based destination, including a walking trail from Eildon township, iconic lookout, café with views of Lake Eildon, and 12 privately operated glamping tents.	New product to reach new markets	Mt Pinniger, Eildon	\$500K	\$16.2 million (inc. planning)	GMW / Murrindindi Shire / Private	<ul style="list-style-type: none">- Prepare a detailed masterplan- Seek funding- Detailed planning	High
Fry Bay Nature-Based Precinct	A high quality nature-based destination, including a walking trail from Goughs Bay township, an architectural lookout, mountain bike trails, and an eco-retreat with 20 self-contained guest rooms and day spa for use by accommodation visitors and external visitors.		Improve the experience for existing visitors	Fry Bay, Goughs Bay	\$500K	\$23.9 million (exc. Planning)	DELWP / Mansfield Shire / Private	<ul style="list-style-type: none">- Prepare a detailed masterplan- Seek funding- Detailed planning

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	High-level Actions (Detailed further in Business Cases)	Economic Impact Level
Business Case 3 - Skyline Rd Precinct								
Skyline Rd Precinct	Development of a tourist precinct along Skyline Road through 18kms of road sealing, lookout points, land rezoning to accommodation tourism development, investment in a boutique distillery/ restaurant, and experiential visitor accommodation.	<p>New product to reach new markets</p> <p>Improve the experience for existing visitors</p>	Eildon and Bonnie Doon	\$500K (inc. planning scheme amendments)	<p>\$25 million total</p> <p>\$7 Million public cost</p>	Mansfield and Murrindindi Shires / Private Operator	<ul style="list-style-type: none"> - Planning - Sealing of road - Planning Scheme Amendments - Attraction of Private Operator - Delivery 	High
Business Case 4 – Sewerage System Investment								
Eildon-Jerusalem Creek Pipeline	Delivery of a 6.4 km sewer pipeline connecting Jerusalem Creek and Eildon to improve environmental outcomes and facilitate private and public sector investment.	Investment in enabling infrastructure	Eildon and Jerusalem Creek	\$750K	\$7 million (incl. planning)	Goulburn Valley Water / Murrindindi Shire (advocacy)	- Advocacy for funding and delivery	High
Mansfield-Goughs Bay Pipeline	Delivery of an 18 km sewer pipeline connecting Goughs Bay to Mansfield to improve environmental outcomes and facilitate private and public sector investment.		Mansfield and Goughs Bay	\$800K	\$15.2 million (incl. planning)	Goulburn Valley Water / Mansfield Shire (advocacy)	- Advocacy for funding and delivery	High

T30. TIER 1 AND TIER 2 MASTERPLAN PROJECTS

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	Actions	Economic Impact Level
TIER ONE PROJECTS								
Investigate New Lake Eildon Governance Arrangement	A detailed review of the current governance structure of the Lake Eildon region should be undertaken, with the aim of developing a governance arrangement that will provide leadership for the region and assist with long-term delivery of the Masterplan.	Improved destination management	Lake Eildon region	\$50 K for detailed study	TBD	Masterplan Project Steering Group	- Undertake a detailed review of the current governance structure	High
Lake Eildon Brand and Marketing Strategy	A marketing and branding strategy should be developed to create a clear vision and strategic direction for the Lake Eildon region.	Improved destination management	Lake Eildon region	\$80K for strategy development	TBD	Tourism North East	- Seek funding - EOI for branding and marketing strategy for Lake Eildon	High
Primary Lakeside Visitor Precincts Goughs Bay Jerusalem Creek Eildon	Delivery of improved lakeside visitor destinations at locations that can access low water including boat ramp improvements, mooring facilities, summertime activation, toilets, landscaping and commercial tenancies – leaseholds and pop-ups.	Improve the experience for existing visitor markets	Eildon	\$250K	\$4 Million	GMW/ New Governance Organisation	- Detailed precinct masterplans	Medium
Golden Trout Brewery Bistro and Visitor Accommodation	Re-establishment of the Golden Trout Hotel, including consideration of 'floating' bar on Eildon pondage.	New product to reach new markets Improve the experience for existing visitor markets	Eildon	TBD	\$5 Million	Private Sector	- Design - Seek funding - Delivery	Medium

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	Actions	Economic Impact Level
Key Township Landscape Masterplans Bonnie Doon Eildon Goughs Bay	Undertake landscape improvement masterplans for the three key settlements to improve township amenity, vegetation, and signage.	Improve the experience for existing visitor markets	Bonnie Doon Eildon Goughs Bay	\$150K (\$50K per township)		Mansfield and Murrindindi Shires	- Undertake masterplans	Medium
Eildon Nature Based Hub	A nature based hub which provides a service centre for accessing information, booking tours, hiring water craft.	New product to reach new markets	Eildon	\$50K		GVW/ Parks Victoria/	- Feasibility Study	Medium
TIER TWO PROJECTS								
Lake Eildon Investment Portal	Establish an online portal which identifies key investment opportunities for the region	Improved Destination Management	Lake Eildon		\$50K	Tourism North East	- Contract development of investment portal	High
Deliver Lake Eildon Masterplan Planning Scheme Amendments	Mansfield and Murrindindi Shire to deliver planning scheme amendments to facilitate tourism investment. This should consider investigation of the following sites: - Bonnie Doon Hotel - Blue Gums Caravan Park Precinct and Snobs Creek Vineyard - Land along the Skyline Road - Land surrounding Eildon township - Eildon Boat Club land - Jerusalem Creek - Mt Pinniger	Improved Destination Management	Various sites	\$500K		Mansfield and Murrindindi Shires	- Prepare any necessary planning documentation - Prepare any necessary expert reports - Undertake amendment	High
Bonnie Doon Adventure Park	Establishment of an adventure park at Bonnie Doon	Improve the experience for existing visitor markets	Bonnie Doon			Private Sector	-	High

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	Actions	Economic Impact Level
Eildon Destination Mountain Bike Park	Delivery of a destination mountain bike park in land adjoining Eildon Township.	New product to reach new markets	Eildon	\$150K	\$2.5 Million	Eildon Mountain Bike Club/ Murrindindi Shire Council	<ul style="list-style-type: none"> - Prepare concept plan and business case - Seek funding - Detailed planning 	Medium
Upper Pondage Fishing Lodge	High end fishing lodge to be establish on the Upper Pondage.	New Product to reach new markets	Eildon	\$300K	\$6 Million	Private Sector/ GMW	<ul style="list-style-type: none"> - Promote leasehold option - Design - Seek funding - Delivery 	Medium
Eildon Walking Trail	Walking trail linking Eildon, connecting Eildon Boat Club, Caravan Parks, Eildon township, and pondage.	Improve the experience for existing visitor markets	Eildon Township	\$80K	\$1 Million	Murrindindi Shire / GMW	<ul style="list-style-type: none"> - Prepare concept - Undertake planning - Seek funding 	Medium
Mansfield to Goughs Bay Cycling Trail	Cycling trail linking Mansfield township with Goughs Bay	Improve the experience for existing visitor markets	Goughs Bay			Mansfield Shire	<ul style="list-style-type: none"> - Investigate route options 	Medium
Parks Victoria and DELWP NBT Experience Development	Development of walking trail experiences across DELWP and Parks Victoria land.	New Product for New Markets	Lake Eildon region	\$80k		Parks Victoria / GMW / DELWP	<ul style="list-style-type: none"> - Prepare a walking trail masterplan 	Medium

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	Actions	Economic Impact Level
Visitor Servicing and Signage Strategy	Undertake a visitor servicing and signage strategy to ensure a consistent approach to signage and visitor services exists	Improved Destination Management	Lake Eildon	\$120K		Tourism North East	<ul style="list-style-type: none"> - Seek funding - Appoint consultant to deliver the strategy 	Medium
Goulburn River Tourism Precinct	Investigate the opportunity to establish an expanded tourism precinct near Blue Gums that supports new tourist parks and cabin accommodation	New Product for New Markets	Eildon			Murrindindi Shire Council	<ul style="list-style-type: none"> - Seek planning scheme amendment - Deliver infrastructure to precinct 	Medium
Bull Ring Open Air Events Precinct	Development of a precinct to support events below the dam wall.	New Product for New Markets	Eildon	\$40K		Mansfield and Murrindindi Shires / Tourism North East / GMW	<ul style="list-style-type: none"> - Detailed Precinct Masterplan 	Medium
Nature Based Experiential Accommodation	Promote the development of nature based accommodation on DELWP and GMW land with lake views.	New Product for New Markets	Lake Eildon		\$	GMW / DELWP / Tourism North East	<ul style="list-style-type: none"> - Identify sites and parcel off 	Medium
Blue Gums to Eildon Pipeline	Delivery of pipeline between Eildon and Blue Gums Caravan Park Precinct.	Investment in enabling infrastructure	Eildon				<ul style="list-style-type: none"> - Undertake feasibility study 	Medium
Dam Wall Light Installations/Shows	Investigate night time activation of the dam wall	Improve the experience for existing visitor markets	Eildon		\$80K	Mansfield and Murrindindi Shires / Tourism North East / GMW	<ul style="list-style-type: none"> - Seek funding - Appoint artists 	Low

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	Actions	Economic Impact Level
Bonnie Doon Rail Bridge Light Activations	Investigate night time activation of the Bonnie Doon Bridge and Lake below.	Improve the experience for existing visitor markets	Bonnie Doon			Mansfield and Murrindindi Shires / Tourism North East	<ul style="list-style-type: none"> - Seek funding - Appoint artists 	Low
Bonnie Doon Waterplay Park	Establishment of a waterplay park using inflatables at Bonnie Doon Hotel	Improve the experience for existing visitor markets	Bonnie Doon		\$200K	Private Sector / GMW	<ul style="list-style-type: none"> - Support private sector investment 	Low
Tours and Activities/Watercraft Hire	Opportunity for an operator to establish watercraft hire hubs across key destinations at Lake Eildon.	Improve the experience for existing visitor markets	Bonnie Doon			Private Sector GMW	<ul style="list-style-type: none"> - Promote the opportunity through a new investment portal 	Low
Peppin Point Day Visitor Precinct and Community Hub	This would be undertaken as part of the Day visitor precinct projects.	Improve the experience for existing visitor markets	Peppin Point			Mansfield Shire	<ul style="list-style-type: none"> - Detailed Precinct Masterplan - Design of community facility and toilets 	Low
Blue Gums Caravan Park to Eildon Township Trail	Develop a trail link between Blue Gums and Eildon.	Improve the experience for existing visitor markets	Eildon		\$500K	Murrindindi Shire Council	<ul style="list-style-type: none"> - Prepare detailed plans - Undertake planning 	Low

Project Name	Description	Theme	Location	Cost - Planning	Cost - Delivery	Delivery Agency	Actions	Economic Impact Level
Touring Boat Bar	Potential touring bar on the water to service the visitors on the Lake including houseboats and camp sites.	Improve the experience for existing visitor markets	Eildon Township	\$100K	\$200K	Private Sector / GMW	- Promote the concept through a new online investment portal	Low
Eildon Waterplay Park	Delivery of a waterplay park in the town centre of Eildon to drive activation.	Improve the experience for existing visitor markets	Eildon	\$200K	\$2 Million	Murrindindi Shire	-	Low
Cultural Touring	Taungurung Traditional Owners to deliver cultural tours of the region.	New Product for New Markets	Lake Eildon region	TBD	TBD	Taungurung Traditional Owners	- Establish touring itineraries - Promote through Murrindindi Shire and High Country	Low
Goughs Bay to Mountain Bay Cycling Trail	Investigate a cycling trail linking Goughs Bay township with Mountain Bay residential settlement area.	Improve the experience for existing visitor markets	Goughs Bay Mountain Bay			Mansfield Shire	- Investigate route options	Low

APPENDICES

APPENDIX A PAVE MODELLING

The number of visitors to the Lake Eildon region has been calculated using Urban Enterprise's PAVE model. The model uses a number of algorithms to estimate local visitation, which draw on local level accommodation data (number of establishments, guest rooms, camping/caravan sites), number of non-resident properties (provided by Mansfield and Murrindindi Shires), primary visitor market research (holiday home, houseboat and visitor intercept surveys), ABS Survey of Tourist Accommodation data (occupancy rates) and National Visitor Survey Data (visitor proportions).

PAVE modelling has been used for the preparation of visitation figures for this report to present a more holistic representation of visitation to the region. Relying on Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) data in isolation does not provide an accurate account of total visitation to the Lake Eildon region for the following reasons:

- IVS and NVS data does not capture visitation for persons 14 years and under;
- Sampling methods for the NVS do not effectively capture holiday home visitors, due to the biased nature of holiday home ownership. This results in underestimating the number of visitors staying in holiday homes and for the Lake Eildon region, which has many non-permanent rate payers, underestimates total overnight visitation to the region;
- The IVS does not provide estimates of international day-trippers to the Lake Eildon region.

In response to the underestimation of visitation Lake Eildon region, Urban Enterprise provides new estimates on visitation to the region, accounting wholly for the holiday home sector, visitors aged under 14 and international visitation.

In addition, NVS/IVS data is not accurate below the LGA level for Lake Eildon region due to the low sample size. Urban Enterprises PAVE model has been developed to provide visitor estimates for small areas.

Urban Enterprise has applied this model to a number of areas in the past including Greater Geelong and the Bellarine, Greater Shepparton, Strathbogie Shire, Murrindindi Shire, Mansfield Shire, Mitchell Shire, Surf Coast Shire, Mornington Peninsula Shire, Indigo Shire and City of Frankston. This work has been used for understanding visitation at the small area level for those areas and also for economic impact modelling.

APPENDIX B ECONOMIC TERMS AND DEFINITIONS

Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Employment data represents the number of people employed by businesses / organisations in each of the industry sectors in a defined region. Employment data presented in this report is destination of work data. That is, no inference is made as to where people in a defined region reside. This employment represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy.

Impacts used in this assessment include the following terms:

- Direct effects – Direct output or value of development or construction activity.
- Indirect effects:
 - Supply-Chain effects – The increased output generated by servicing industry sectors in response to the direct change in output and demand; and
 - Consumption effects – As output increases, so too does employment and wages and salaries paid to local employees. Part of this additional income to households is used for consumption in the local economy which leads to further increases in demand and output region



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