

See inset

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

Page 498 of 124

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



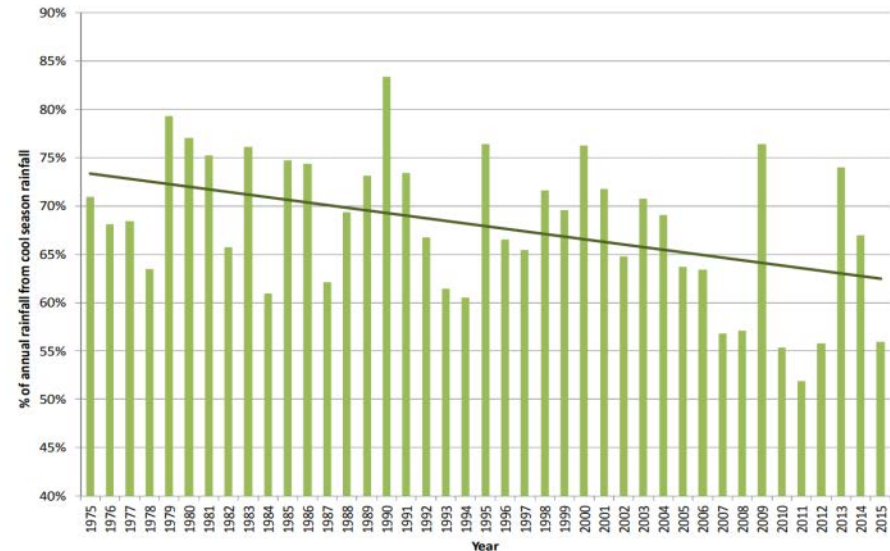
Source: Mansfield Courier, 2019

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.

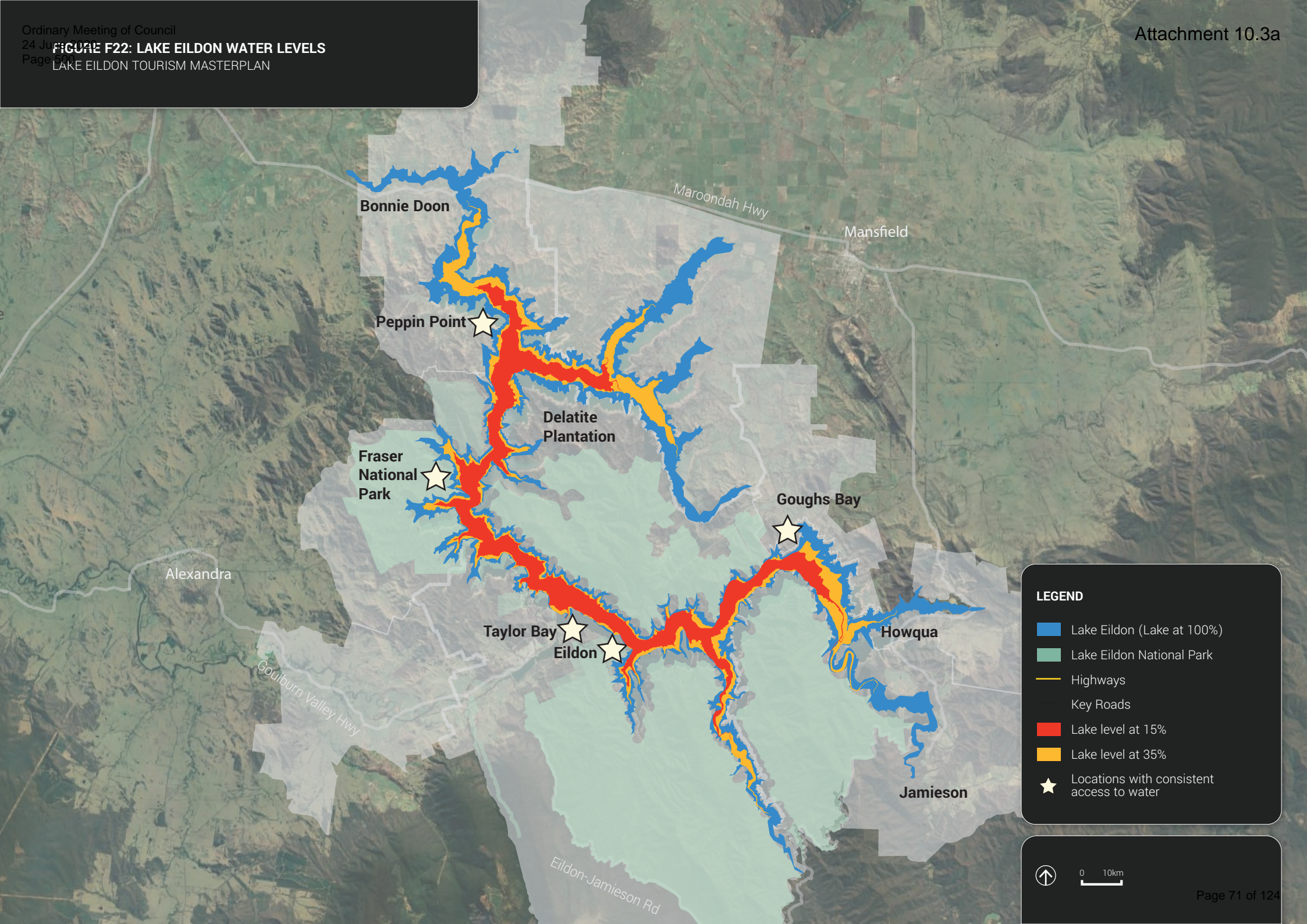
Declining rainfall trends are forecast to continue into the future, as climate change continues to adversely affect rainfall patterns. This will have significant impacts on water levels at Lake Eildon, therefore it will be crucial to mitigate the effects of climate change by future proofing the region 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



0 10km

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 GVV 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.

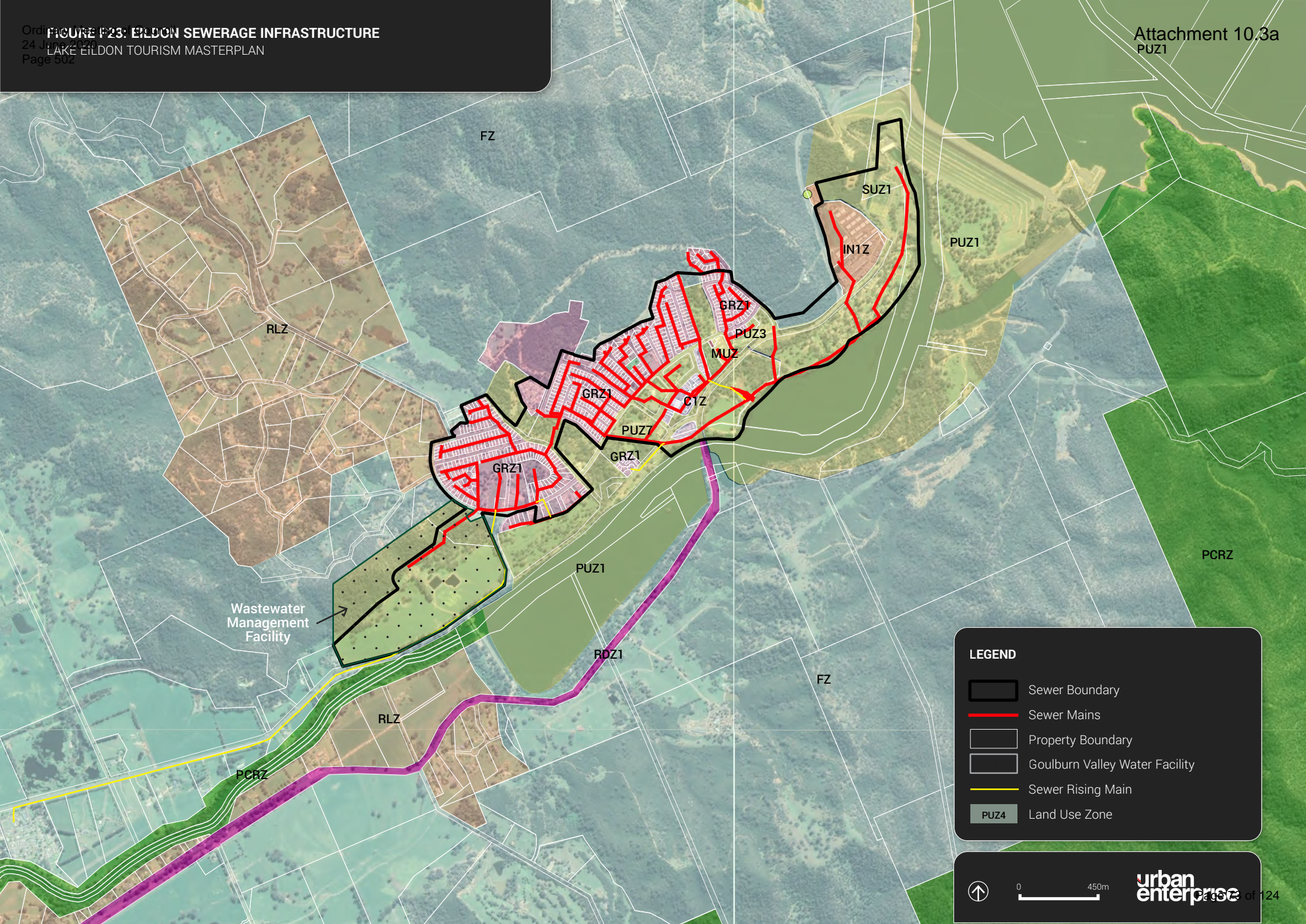
Goulburn Valley Water have indicated that there is no capacity to service additional properties in either town with current sewerage infrastructure. The Wastewater Management facility at Eildon has no spare treatment capacity, whereas there is no spare irrigation/winter storage capacity in Bonnie Doon. 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.



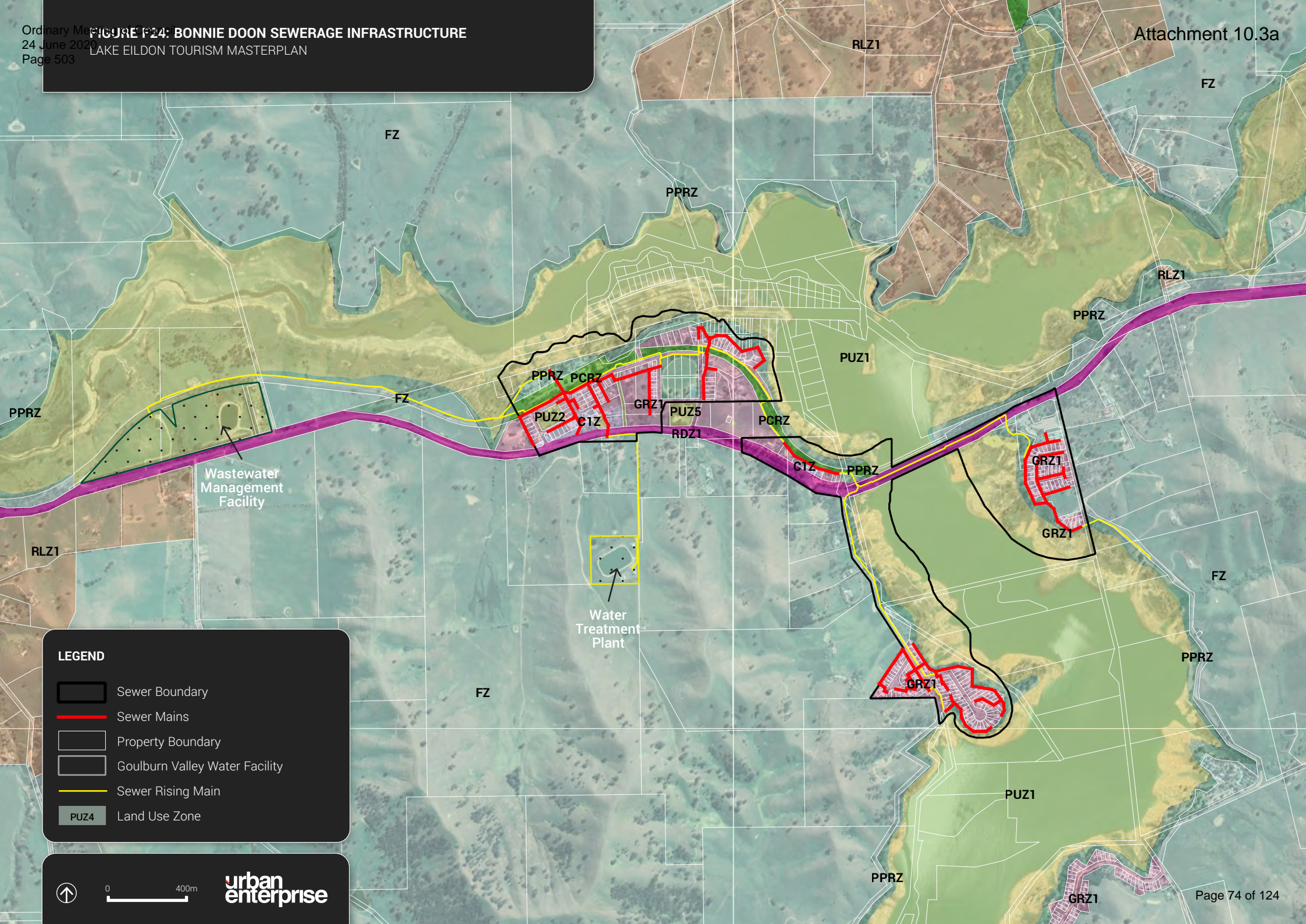
LEGEND

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

0 450m

urban enterprise 12 of 124

FIGURE 24: BONNIE DOON SEWERAGE INFRASTRUCTURE
LAKE EILDON TOURISM MASTERPLAN



LEGEND

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

0 400m

urban enterprise

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.

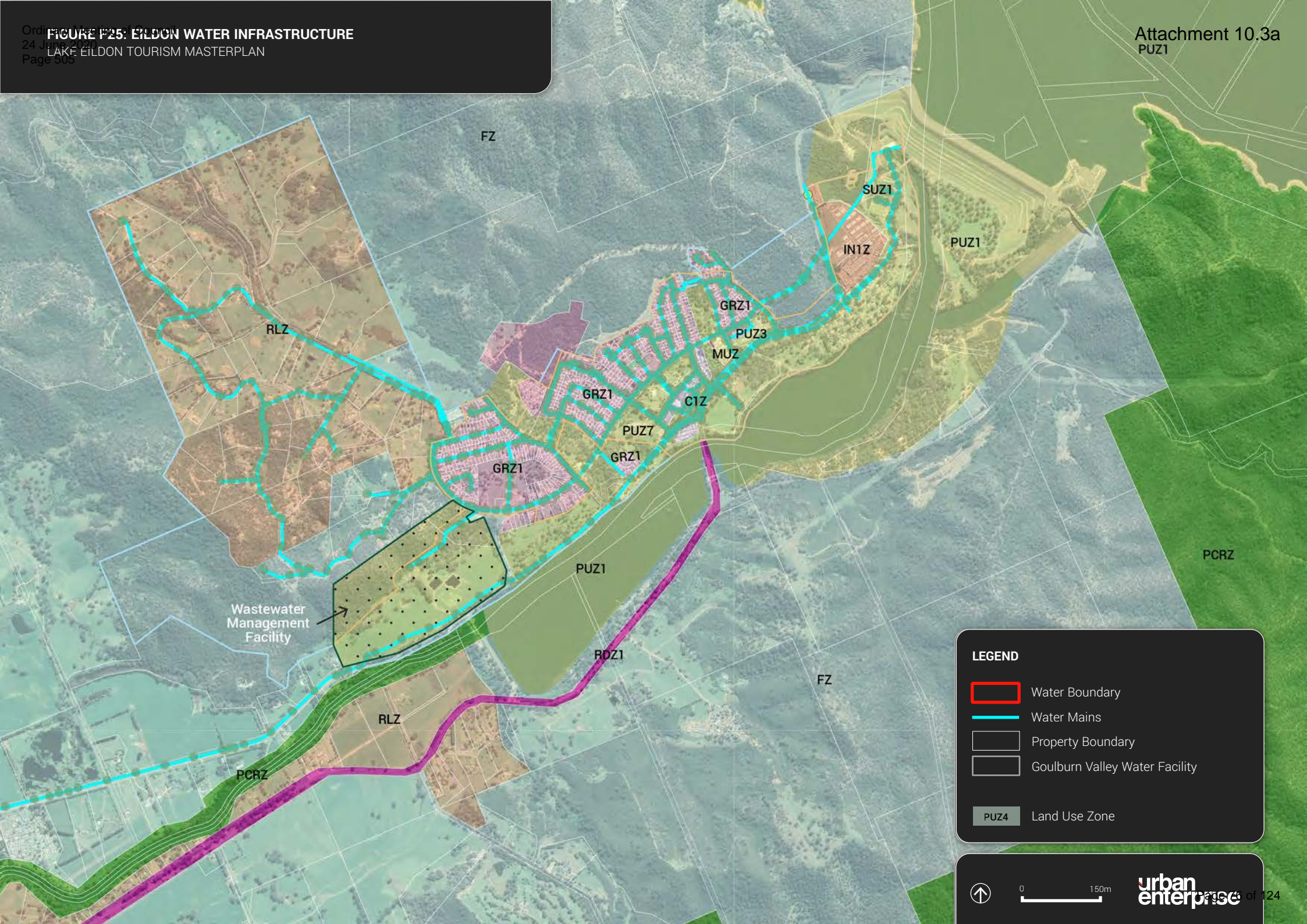
Table T26 shows both the current and future capacity of the water system in the Lake Eildon region. The water treatment plants have significant capacity to service an increase in peak day demand. The Water Treatment Plant in Eildon has the ability to service approximately 500 additional residential properties,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

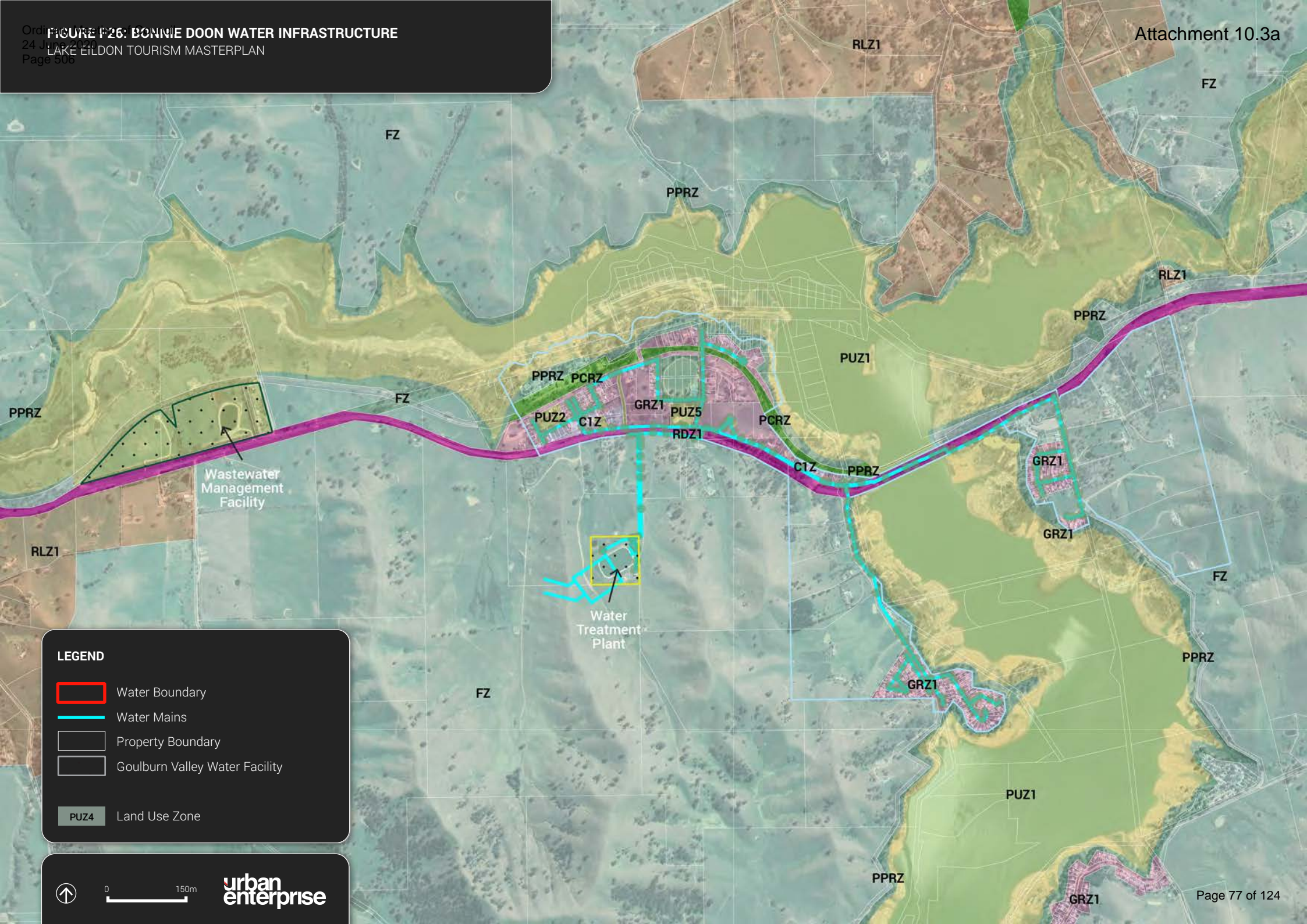


LEGEND

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

 0 150m 

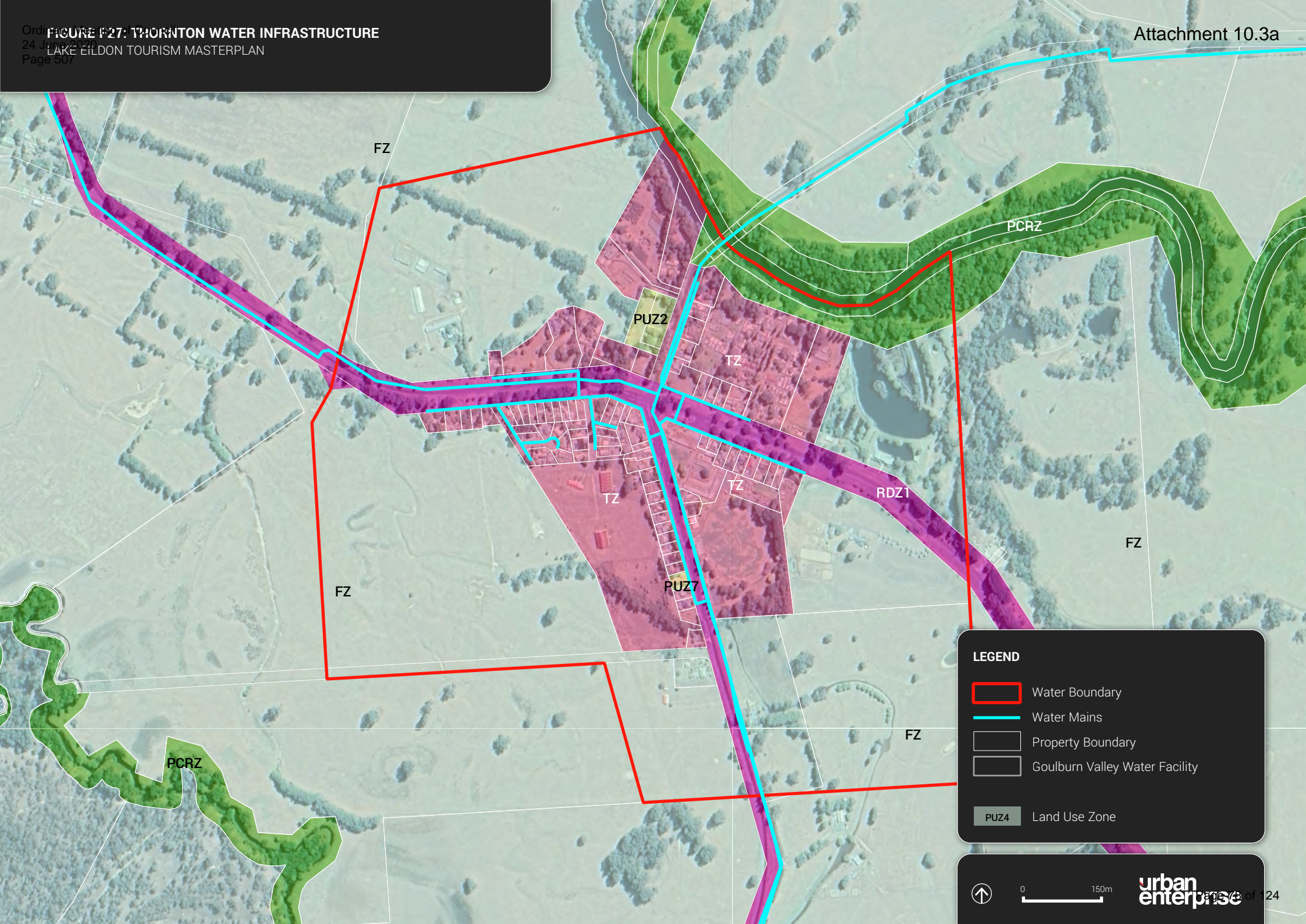
urban enterprise  Page 4 of 124



LEGEND

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

↑
0 150m
urban
enterprise



LEGEND

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

0 150m

urban enterprise page 6 of 24

TELECOMMUNICATIONS

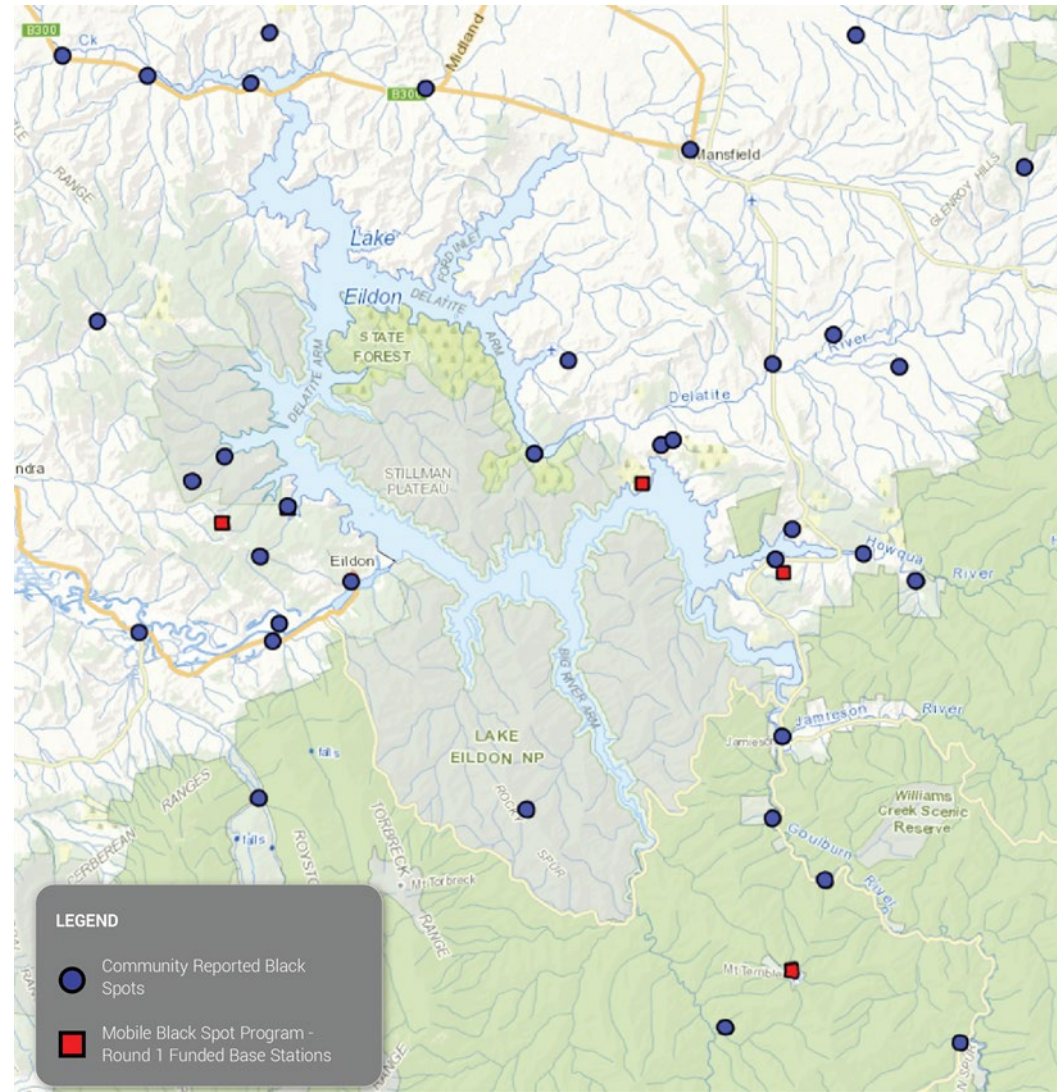
There are a significant number of mobile blackspots throughout the Lake Eildon region, particularly around Bonnie Doon, Jamieson, Eildon and Thornton, and Goughs Bay/Howqua.

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	Manages 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:

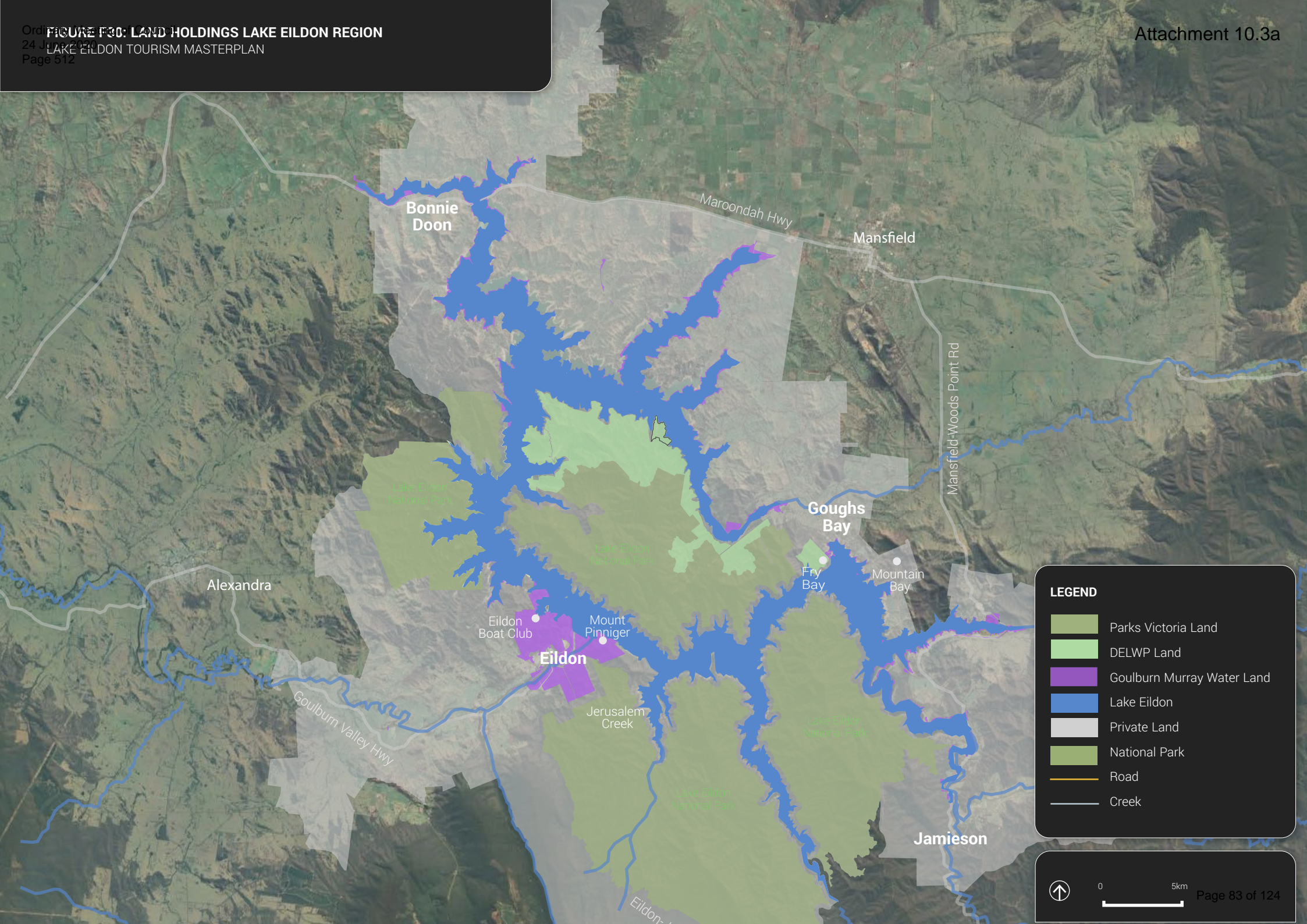
- Parks Victoria land is confined to the Lake Eildon National Park.
- DELWP manage the land within the Delatite Arm Reserve, and the former plantation site in Goughs Bay (at Fry Bay).
- Goulburn-Murray Water have significant freehold land holdings around the Lake;
- There are a few Council owned properties 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 10.3: LAND HOLDINGS LAKE EILDON REGION

LAKE EILDON TOURISM MASTERPLAN



LEGEND

- Parks Victoria Land
- DELWP Land
- Goulburn Murray Water Land
- Lake Eildon
- Private Land
- National Park
- Road
- Creek

0 5km

Page 83 of 124

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 Like 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.

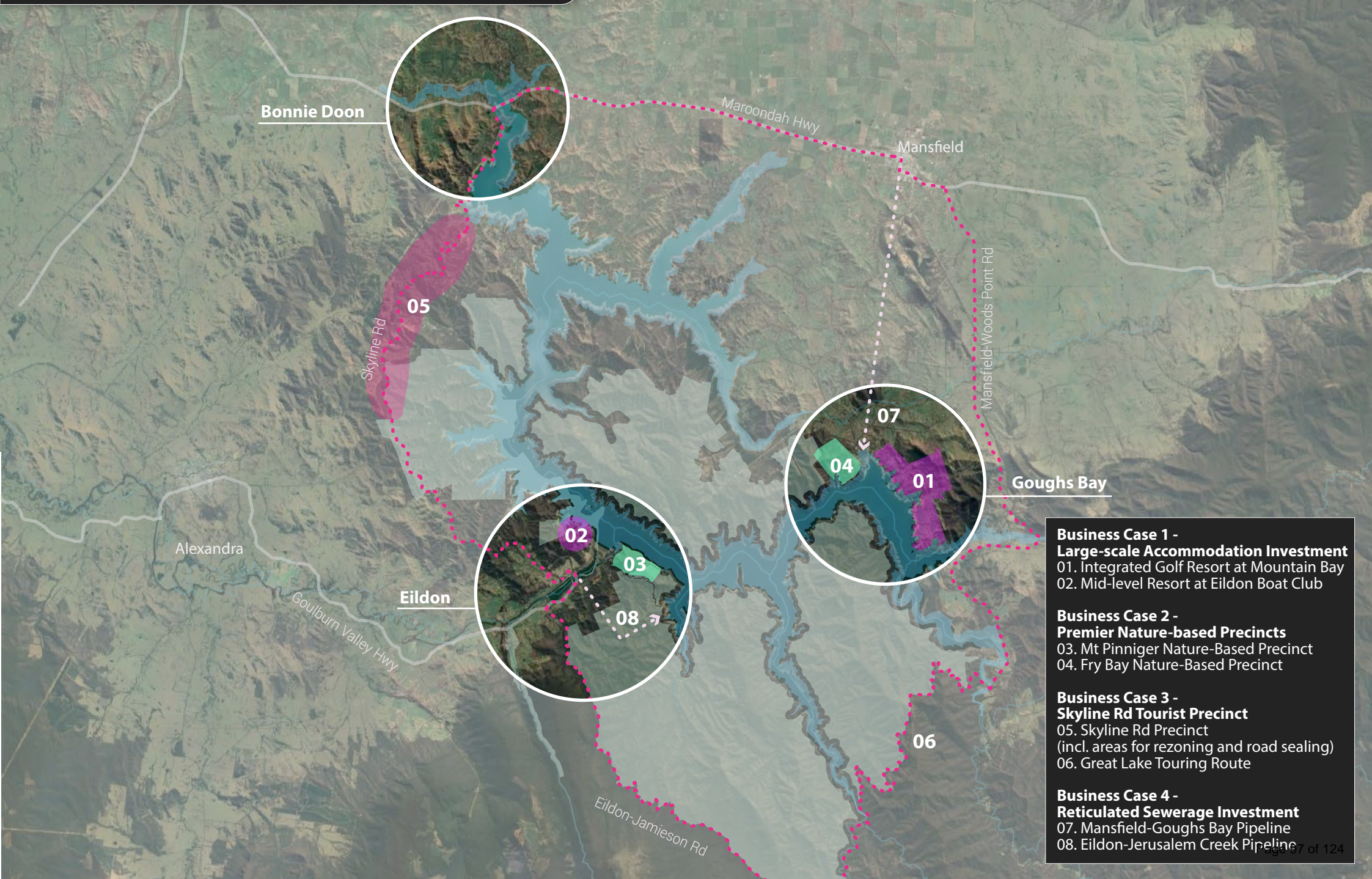
9.7. MASTERPLAN CONCEPTS

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.

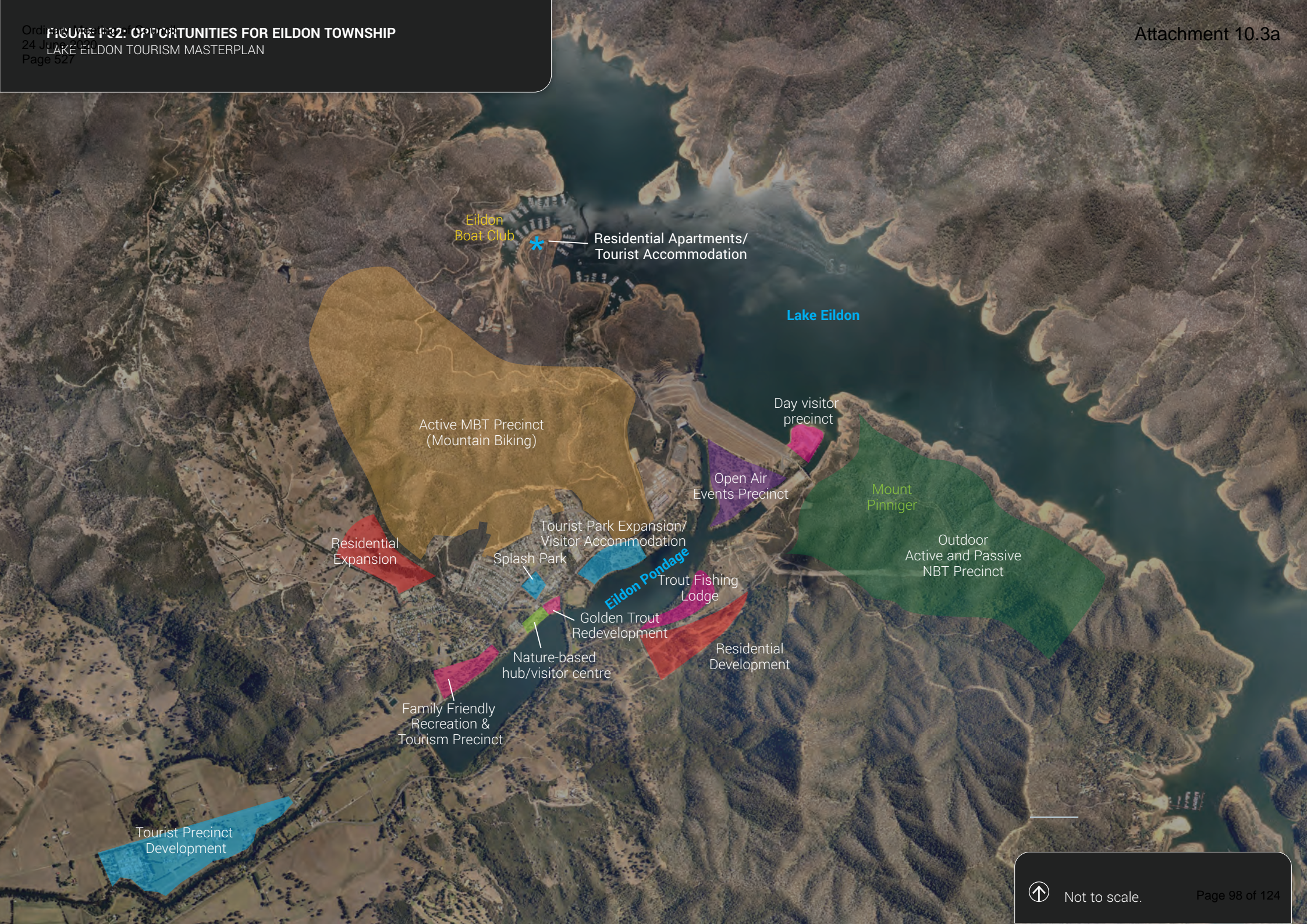
Further detailed is provided on each of the masterplan concepts, including business case and tier 1 and 2 projects in the following section.



- Business Case 1 - Large-scale Accommodation Investment**
 01. Integrated Golf Resort at Mountain Bay
 02. Mid-level Resort at Eildon Boat Club
- Business Case 2 - Premier Nature-based Precincts**
 03. Mt Pinniger Nature-Based Precinct
 04. Fry Bay Nature-Based Precinct
- Business Case 3 - Skyline Rd Tourist Precinct**
 05. Skyline Rd Precinct
 (incl. areas for rezoning and road sealing)
 06. Great Lake Touring Route
- Business Case 4 - Reticulated Sewerage Investment**
 07. Mansfield-Goughs Bay Pipeline
 08. Eildon-Jerusalem Creek Pipeline

FIGURE 10.2: OPPORTUNITIES FOR EILDON TOWNSHIP

LAKE EILDON TOURISM MASTERPLAN



Eildon Boat Club

Residential Apartments/
Tourist Accommodation

Lake Eildon

Active MBT Precinct
(Mountain Biking)

Day visitor
precinct

Open Air
Events Precinct

Mount
Pinniger

Outdoor
Active and Passive
NBT Precinct

Residential
Expansion

Tourist Park Expansion/
Visitor Accommodation

Splash Park

Eildon Pondage

Trout Fishing
Lodge

Golden Trout
Redevelopment

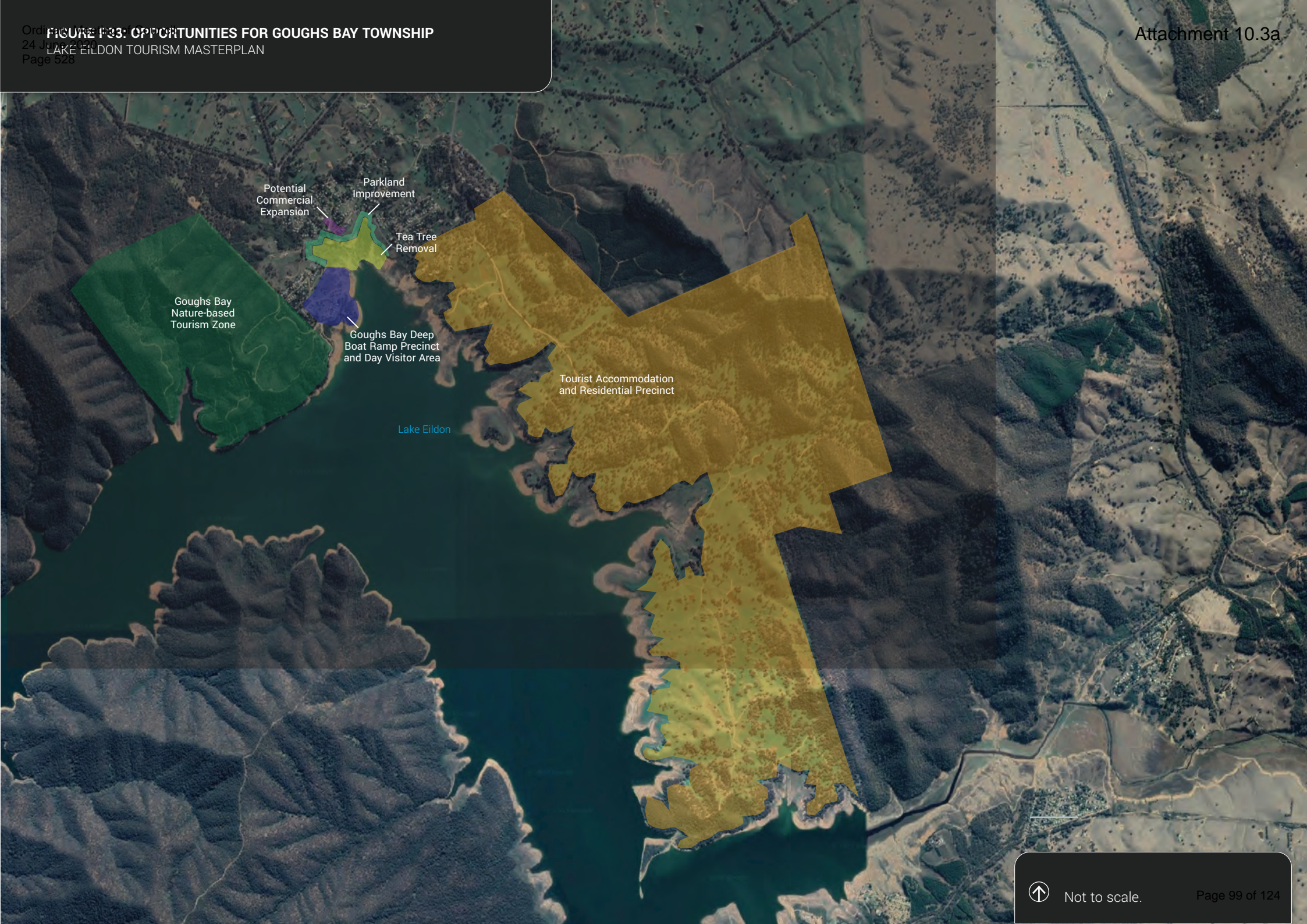
Residential
Development

Nature-based
hub/visitor centre

Family Friendly
Recreation &
Tourism Precinct

Tourist Precinct
Development

FIGURE 10.33: OPPORTUNITIES FOR GOUGHS BAY TOWNSHIP



Goughs Bay
Nature-based
Tourism Zone

Potential
Commercial
Expansion

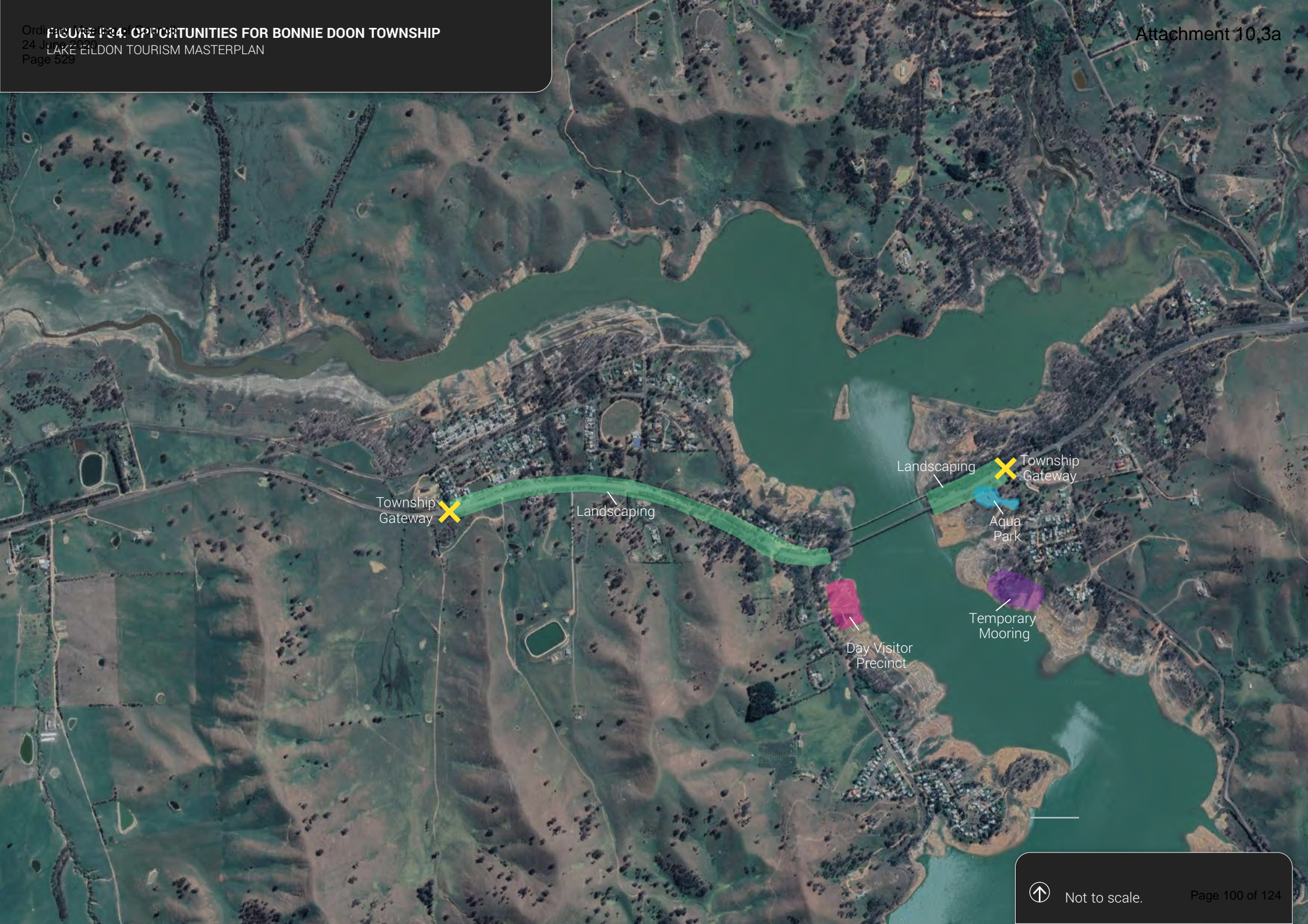
Parkland
Improvement

Tea Tree
Removal

Goughs Bay Deep
Boat Ramp Precinct
and Day Visitor Area

Lake Eildon

Tourist Accommodation
and Residential Precinct



Township Gateway

Landscaping

Landscaping

Township Gateway

Aqua Park

Temporary Mooring

Day Visitor Precinct



Not to scale.

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

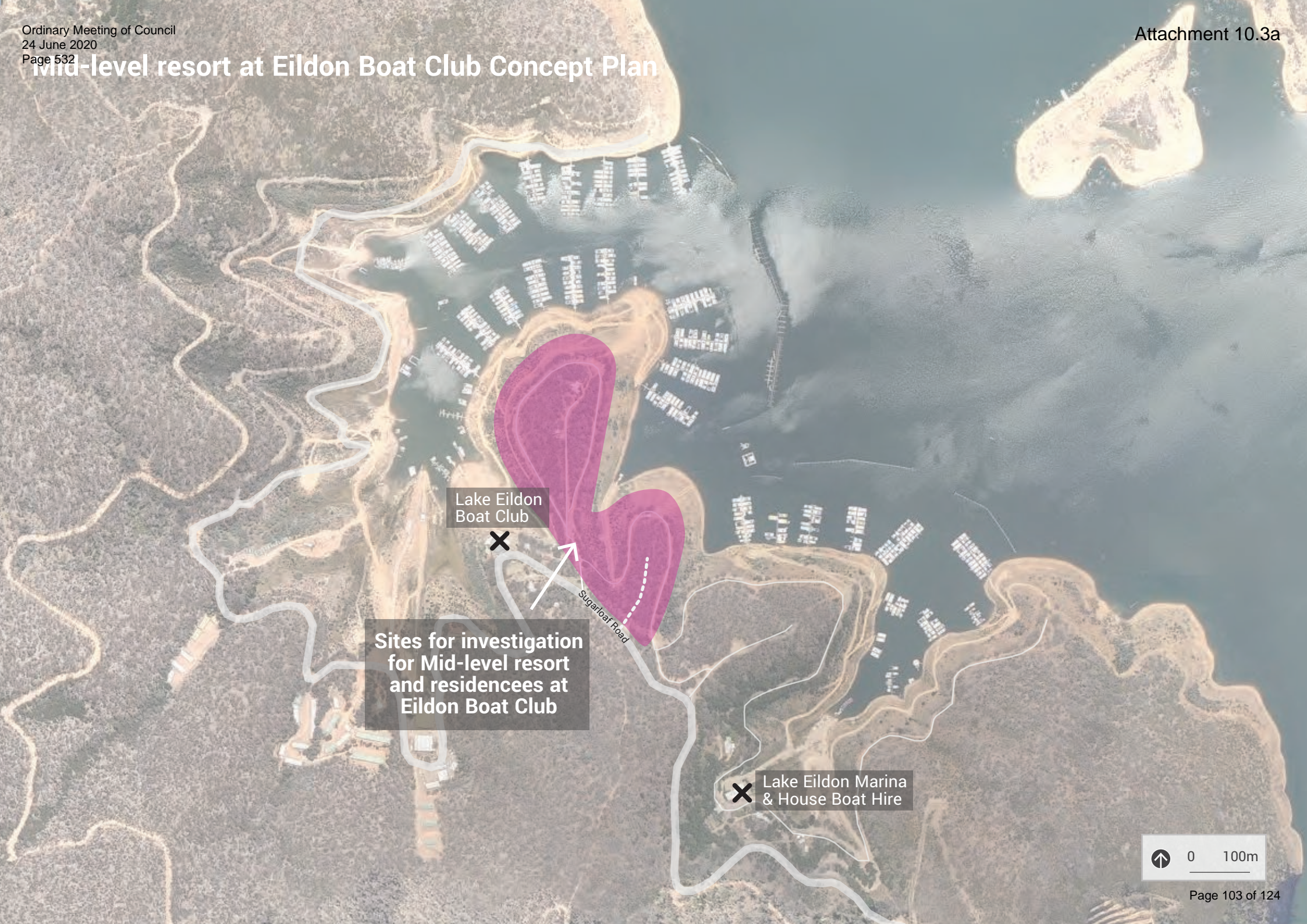
Mountain Bay - View



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Mid-level resort at Eildon Boat Club Concept Plan



Lake Eildon
Boat Club

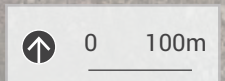


Sugarloaf Road

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



Lake Eildon Marina
& House Boat Hire



0 100m

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

Mt Pinniger - View



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Fry Bay - View



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

Skyline drive - View



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STUDIO**
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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.	New product to reach new markets Improve the experience for existing visitors	Eildon and Bonnie Doon	\$500K (inc. planning scheme amendments)	\$25 million total \$7 Million public cost	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)	<ul style="list-style-type: none"> - 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)	<ul style="list-style-type: none"> - 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

