

MURRAY REGION CRUISING STRATEGY

SUMMARY
REPORT

Murray
REGIONAL TOURISM

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Owners of the land and waters of the Murray Region.

On behalf of the Murray Regional Tourism Board, we pay respect to their Elders, past, present and future. The Murray Regional Tourism Board commits to celebrate the region's diverse and rich First Nations history, the diversity of its people and their important ongoing connections to Country.



Cover image location: Murray River, Echuca
Cover image credit: Robert Blackburn

MESSAGE FROM THE CHAIR

As chair of the Murray Regional Tourism Board it is my pleasure to present the Murray Region Cruising Strategy.

The Murray Region Cruising Strategy sits within the “Revitalising the Murray”, a strategic project consisting of five components that collectively reactivates the visitor economy within the Murray region. In developing the strategy we are grateful for the funding support by the Victorian State Government and the significant consultation and engagement with a broad range of stakeholders. Each of the five project components provide a range of outcomes and benefits responding to the needs of both industry, large and small, and government.

The Murray region is a diverse and rich region that encompasses 13 Local Government Areas (LGAs) across both sides of the New South Wales-Victorian border. The Murray River connects the region and is the source of much of the existing visitation to and surrounding townships.

The cruising sector is integral to the strength and vibrancy of the Murray region visitor economy. Cruising contributes \$88.8 million in direct visitor expenditure to the Murray region economy, with 128,000 visitors annually currently undertaking commercial cruises.

This important document highlights the consumers demand for a variety of cruising options across the whole Murray region, the challenges, barriers, and complexities of navigating the waterways and the governance around the management of the waterways that sit within the Murray region.

It is important that as a region we understand the offerings available and opportunities for investment and growth in this exciting sector of our visitor economy.



Wendy Greiner
Chair of Murray Regional Tourism
October 2022

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EXECUTIVE SUMMARY

The Murray region is a diverse and rich region, encompassing 13 Local Government Areas (LGA) across both sides of the New South Wales-Victorian border. The Murray River connects the region and drives much of the region's existing visitation.

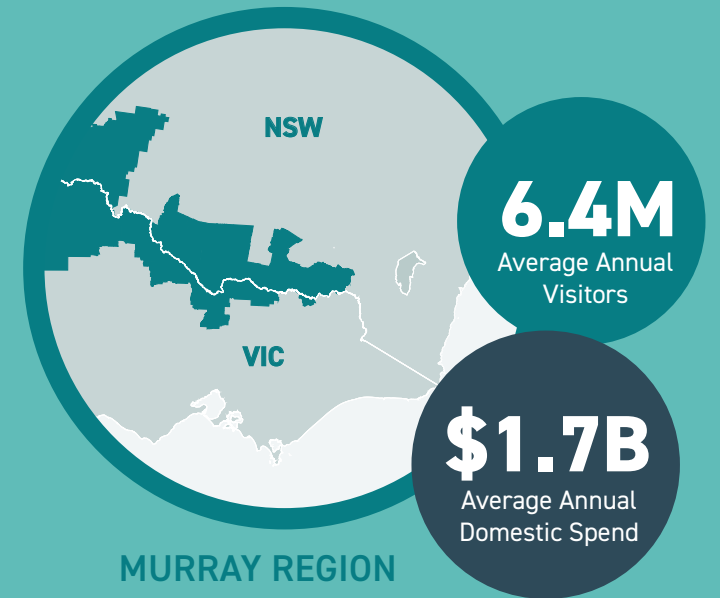
The Murray Region Cruising Strategy is one of five components of the Revitalising the Murray Project, a strategic intervention project undertaken by Murray Regional Tourism (MRT).

WHAT IS CRUISING?



For the purposes of this project, 'Cruising' is defined as any commercial boating or paddling experience on waterways within the Murray region. This excludes private boating.

The cruising industry of the region is currently small, contributing \$88.8 million in direct visitor expenditure, with 128,000 annual visitors currently undertaking cruises¹. The region's waterways are mostly activated for private cruising and a small number of commercial offerings, however the waterways of the Murray region have untapped potential to drive the regional visitor economy, and commercial cruising is the key to this.





WHY IS CRUISING SO IMPORTANT?

The Murray region is the only destination in Australia with such a vast array of accessible and diverse inland waterways, from wetlands to expansive lakes, which creates the potential for endless experiences.

The Murray River connects the region's cities, towns, products and experiences. Cruising can become an integral way to travel through and experience the Murray region, differentiating itself from other destinations across Australia.

Cruising is synonymous with the Murray River in the eyes of the existing visitor market. Strengthening it in the eyes of the broader market is key to longevity of the region.

The Murray region has a market of 5.1 million Australians. There is potential to attract new visitors from the market through delivery of contemporary and compelling cruising experiences.

ECONOMIC IMPACT OF INVESTING IN CRUISING


VISITATION
BENEFIT

+1.8M
Visitors

+\$259M
Spend


ONGOING
BENEFIT (P.A.)

+\$284M
Total Output

+2,167
Jobs



VISION

CRUISING WILL BE ESTABLISHED AS THE MOST COMPELLING AND ICONIC MURRAY REGION VISITOR EXPERIENCE, WHICH UNIFIES AND STRENGTHENS THE REGIONAL PRODUCT OFFERING.

OBJECTIVES

- 1** Grow the number of visitors engaging in paid cruising experiences on the Murray River and key waterways across the region.
- 2** Establish river cruising as an iconic and uniquely 'Murray region' experience.
- 3** Establish iconic cruise experiences that link to existing and potential product strengths of the Murray – food, wine, nature based, indigenous and heritage.
- 4** Drive demand in new markets by developing cruise experiences aligned to market preferences.
- 5** Support development of vibrant and activated cruising hubs through investment in existing cruising precincts and establishment of new precincts at emerging visitor destinations.
- 6** Encourage dispersal of cruising product across the length of the Murray that leverages the unique local physical conditions and local product and experience strengths.
- 7** Strengthen the link between cruising product and other Murray region product pillars and hero experiences.
- 8** Provide supporting hard and soft infrastructure to enable the development of the cruising sector.

STRATEGIC INVESTMENT THEMES

The five themes below have been identified to guide the development of the cruising sector and implementation of the Cruising Strategy. A range of priority projects have been identified for each theme, to be led by Murray Regional Tourism, Councils, the private sector and with support from State and Federal Governments.



Multi-day Cruise Experience

Deliver multi-day cruise experiences on the Murray that establish the region as a leader in inland water cruising in Australia.



Day Cruise Experience

Create a diversity of day-cruise experiences by improving the existing cruise offer and investing in new cruise experiences at locations with limited cruising activity.



Hiring, Touring and Transport

Establishing the Murray as the premier water cruising and access destination, with high levels of accessibility to quality products, equipment and tour experiences.



Enabling Infrastructure

Deliver the supporting infrastructure and investment required at water access points and at key locations to enable cruising.



Supporting Investment in Cruising

Establish a supporting framework, with consideration of streamlined governance, collaborative marketing and quality visitor information to support cruising.



MURRAY REGION CRUISING STRATEGY



Introduction

The Murray Region Cruising Strategy is one of five components that comprise the Revitalising the Murray Project, a strategic intervention project being undertaken by Murray Regional Tourism. Murray Regional Tourism is the Regional Tourism Board and peak tourism organisation for the Murray region in NSW and Victoria.

The Murray region is a diverse and rich region that encompasses 13 Local Government Areas (LGA) across both side of the New South Wales-Victorian border. The Murray River connects the region, and is the source of much of the existing visitation to and surrounding townships. The Murray region is subject to unique land and waterway management, given the vested interest of two states, numerous Government authorities and 13 local government authorities.

For the purposes of this project, 'Cruising' is defined as any commercial boating or paddling experience on any Murray region waterways.

The scope of this project includes:

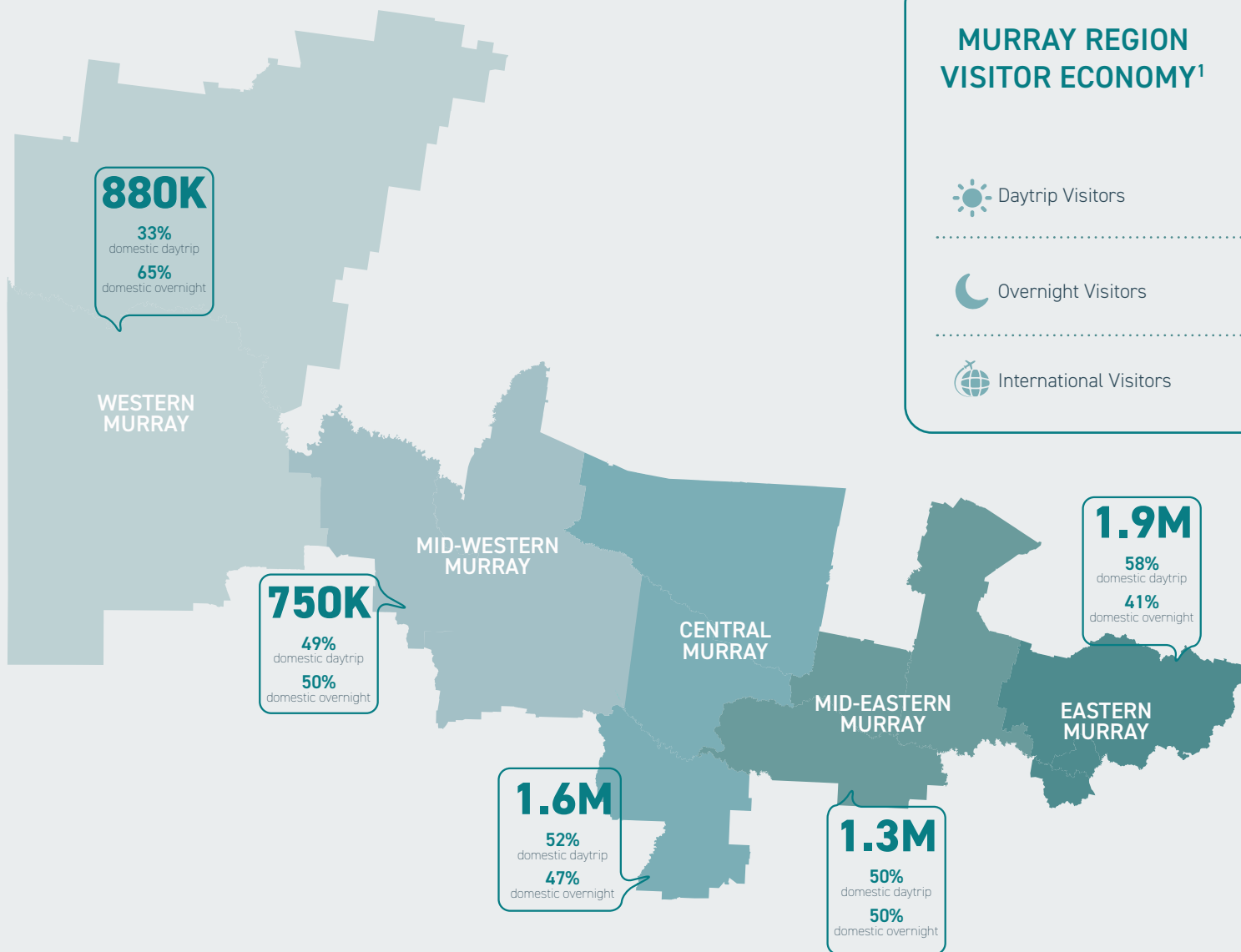
- › Consideration of products and experiences on the Murray River, lakes and rivers connected to the Murray, and any other waterways of scale that can support visitor experiences.
- › Consideration of powered boating, such as paddlesteamers, houseboats, motor vessels and pontoon boats; unpowered boating such as canoeing and kayaking; and paddle sports such as jet skiing and wake boarding.
- › Current infrastructure that supports cruising and investment required to support current and future industry.

Whilst this strategy excludes private boating, such as private houseboats and motor vessels, consideration has been given to infrastructure investment required by the private boat operators.





The Murray Region



MURRAY REGION VISITOR ECONOMY¹

	6.4 M	\$1.7 B
	Average Annual Visitors	Average Annual Domestic Spend
☀ Daytrip Visitors	3.2M 50%	\$446 M \$138 pp
🌙 Overnight Visitors	3.1M 49%	\$1.3 B \$401 pp
🌐 International Visitors	71K 1%	

The majority of visitation is to the Eastern and Central Murray sub-regions, reflecting the strength of Albury-Wodonga as a business, VFR and growing holiday destination, and the strength of Echuca-Moama as a holiday leisure destination.

¹National Visitor Survey (NVS) and International Visitor Survey (IVS), Tourism Research Australia (TRA), 3 year average. Calendar Year 2017-19.

Average international visitor spend has not been provided, as the sample size is too small to accurately derive this figure. International visitation has not been included on the map as it accounts for less than 1% per subregion.

VISITATION DRIVERS¹

Establishment of a strong commercial cruising sector is a key opportunity to connect and integrate experiences, such as dining and farmgate, or parks and wildlife reserves. This will be key to engaging visitors in paid activities and creating compelling experiences that are unique to the Murray Region.

The Murray region product offering is depicted adjacent, as recognised in the Murray Regional Tourism Destination Plan.

Many visitor experiences have been developed to capitalise on the river setting, its rich history and relaxing ambience, including camping, bushwalking, water sports, fishing, river cruising and houseboating. This is reflected in the high number of nature and water based activities undertaken by visitors to the Murray region.

Other strengths in the Murray include food, wine and produce, and history and heritage attractions. Festivals and events are also an important driver of visitation.

The existing market is primarily motivated by holiday and leisure and visiting friends and relatives (VFR). For these travellers, the most popular activities undertaken are social activities, such as eating out, visiting friends and relatives and visiting clubs (e.g. RSLs, sporting clubs etc.).

PRODUCT STRENGTHS²

Primary Strengths

- › Water Sports
- › Food, Wine and Produce
- › Fishing
- › Golf
- › Festivals and Events
- › History and Heritage
- › Houseboats / River Cruises

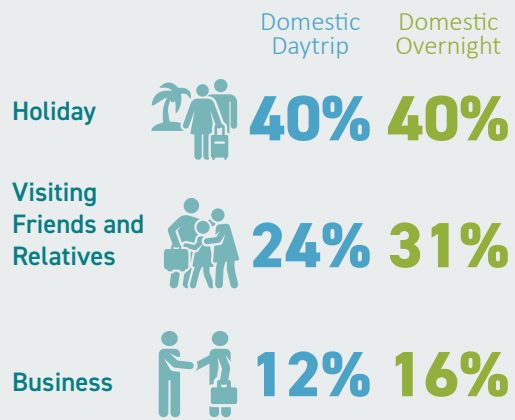
Secondary

- › Nature-based
- › Business Events

Emerging

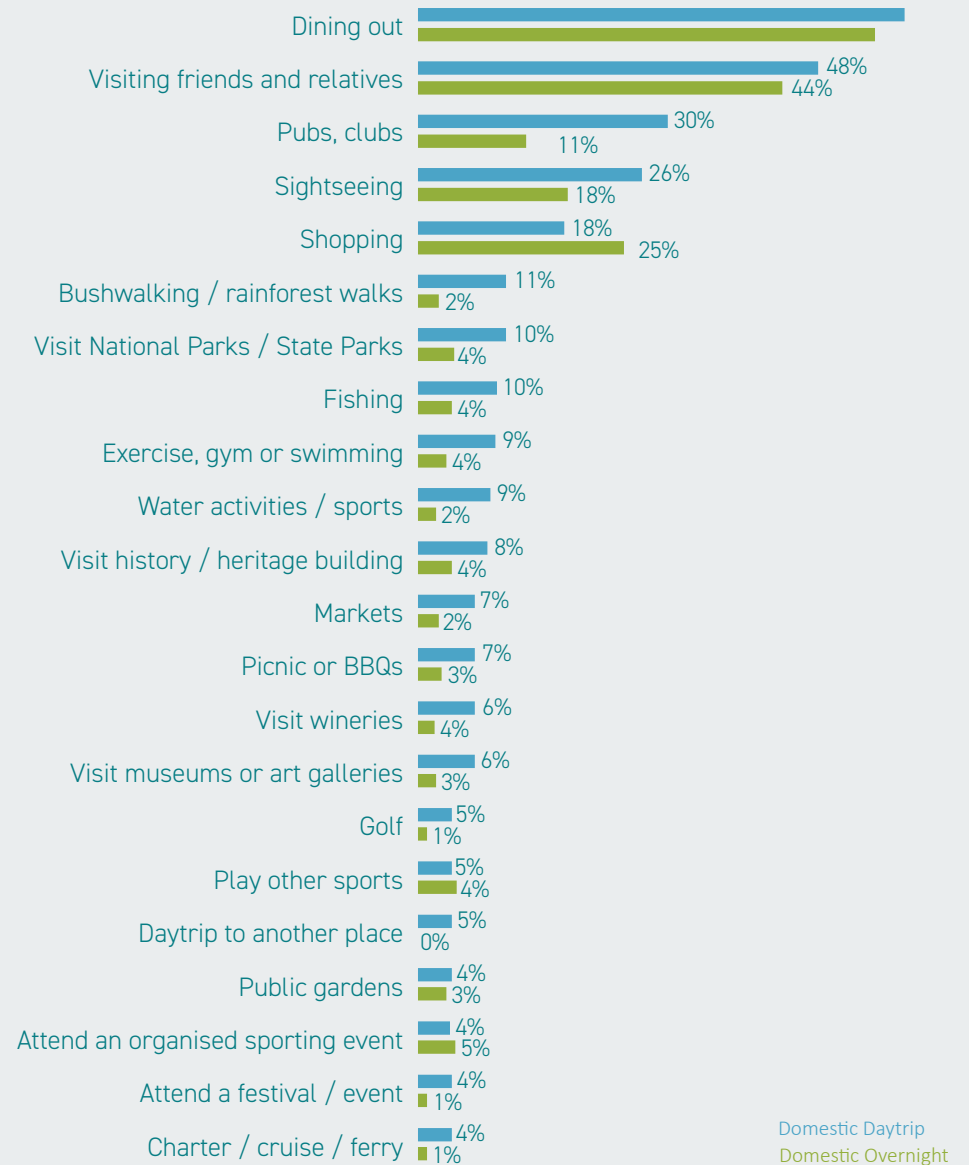
- › Indigenous
- › Arts and Culture
- › Adventure

PURPOSE OF VISIT



Event 8% Daytrip, 7% Overnight Trip;
Other 16% Daytrip, 3% Overnight Trip.

ACTIVITIES UNDERTAKEN



¹Murray Region Destination Management Plan, 2018.

²Tourism Research Australia (TRA), 3 yr average 2017-19.

STRATEGIC CONTEXT

Over the past 10 years Murray Regional Tourism has prepared two Destination Management Plans and multiple strategic plans which map out the future direction and focus for tourism development in the region. These have been outlined on this page.

There are strong linkages between this Strategy and other projects being delivered and supported by Murray Regional Tourism. For example, cruising can help activate riverfront precincts and the Ports of the Murray Project, provide transport linkages for the Murray River Adventure Trail and also look to integrate the river and lake experiences with food, wine, Aboriginal and nature-based experiences.

The 2021-2024 Murray Regional Tourism Strategic Plan, identified the following focus areas for product development:

- › Implement the Murray River Adventure Trail
- › Facilitate the development of touring routes aligned with key experiences and visitor demand
- › Facilitate opportunities to strengthen Aboriginal Tourism experiences

In addition to this the previous Murray Region Destination Management Plan identified the following key priority projects:

- › River cruising and enhancement of riverfront precincts
- › Nature based projects including Murray River Adventure Trail and enhancement of National and State Parks
- › Food drink and agribusiness enhancement
- › Art, culture and heritage including the Ports of the Murray Project
- › Investment in visitor accommodation
- › Infrastructure, access and touring

PORTS OF THE MURRAY

A strategic project which aims to stimulate investment and visitation by showcasing and authenticating the importance of the Ports of the Murray and the role the Murray River played in opening up inland Australia.

Begun in 2010 as a regional change strategy managed by Regional Development Victoria (RDV), this project has expanded to include all riverside communities between SA, VIC and NSW.

MURRAY RIVER ADVENTURE TRAIL

A multi-sport adventure trail which extends the length of the Murray River throughout the Murray Region, using land and water to incorporate walking, cycling, kayaking/canoeing and other forms of water transport.

Ongoing investment aims to connect the region and showcase the waterways and natural attractions.

MURRAY FARM TO PLATE PROGRAM

This project has been established to meet MRT's objective of developing the region as a renowned agri and culinary tourism destination.

The aim of the Murray F2P program is to improve the quality, authenticity and availability of locally produced food and beverage experiences for visitors and locals in the Murray region.

MURRAY RIVER ROAD

The Murray River Road is an untapped travelling route of more than 2,500km alongside the mighty Murray River.

This project, through partnership, aims to transform awareness and understanding of the Murray River by engaging people with the experiences of the river and surrounding region, through significant and sustained marketing investment.

Governance and Management

The region is subject to unique land and waterway management, given the vested interest of two states and numerous local governments. This section aims to highlight key issues and opportunities associated with governance in the Murray region, as relevant to the development of cruising experiences.

The Murray–Darling Basin is Australia’s largest water resource. The Basin covers a large area of south-eastern Australia, as depicted adjacent, where water flows through a system of interconnected rivers and lakes. The Basin covers 13% of the total area of Mainland Australia, and provides water for irrigation to support 40% of all Australian farms.

The Murray tourism region is at the heart of the Murray Darling Basin. The two main rivers of the basin are the River Murray and Darling River, both of which flow through the Murray region.

Management of the Murray Darling Basin is highly complex and involves a large number of Government stakeholders and authorities. The adjacent figure highlights the governance structure for waterways in the region.

The Murray Darling Basin Authority (MDBA) is the key stakeholder in the region. The MDBA is responsible for directing operations of the River Murray system, and overseeing the construction, operation and maintenance of the physical assets (dams, weirs and locks) used to store water and regulate flows in the River Murray system.

Each state government has a body that is responsible for managing water in the Basin, working together with the MDBA. These are Water NSW and Goulburn Murray Water.

The State Constructing Authorities are:

- › New South Wales – WaterNSW and the Department of Planning, Industry and Environment – Water.
- › Victoria – Goulburn-Murray Water.

AUSTRALIAN FEDERAL GOVERNMENT

- › Governs based on the Act Recovers water to achieve the outcomes of the Basin Plan.

MURRAY DARLING BASIN AUTHORITY

- › Delegated Authority from Federal Government. Water regulator that oversees and manages waterways, but does not execute development.

WATERNSW

- › Operate the state’s rivers and water supply systems in accordance with the rules set out by regulators MDBA.

GOULBURN MURRAY WATER

- › Operates rivers and water supply systems in GMW jurisdiction in accordance with the rules set out by MDBA.

AUSTRALIAN MARITIME SAFETY AUTHORITY (AMSA)

TRANSPORT FOR NSW

MARITIME SAFETY VICTORIA

- › Provide boating permits and licenses, regulate safety and supply maritime infrastructure for navigation and safety.

LOCAL GOVERNMENT AUTHORITIES (LGAS)

DELWP / FORESTRY

PARKS VICTORIA / NPWS

- › Manage local infrastructure assets such as wharfs, moorings and in some cases smaller water bodies (e.g. Gunbower Creek).

Existing Situation Analysis

The Murray region is primarily a nature-based destination, containing a number of rivers, lakes and creeks. The region's waterways enable activities such as river cruising, swimming, fishing and paddle sports. These activities provide visitors with a unique viewing point of natural landscapes and wildlife.

The Murray River is the key waterway in the region, adjoining numerous other rivers and lakes. A number of nature-based hubs are located throughout the region.

Rivers



MURRAY RIVER

The Murray River is Australia's longest River and one of the world's longest navigable rivers. The Murray River stretches 2,700 kilometres from the mountains of the Great Dividing Range in north-eastern Victoria to near Adelaide in South Australia. Throughout the Murray region, the river is lined with forests of red gum and sandy beaches. The region is home to plentiful wildlife, supporting over 350 varieties of birds, as well as many species of mammals, reptiles and fish.



DARLING RIVER

The Darling River is the third-longest river in Australia, joining with the Murray River in Wentworth. The confluence of the two rivers is a drawcard for Wentworth.



CAMPASPE RIVER

The Campaspe River extends through Echuca and south into the Central Victorian Highlands. The river is narrow and shallow around Echuca.



EDWARD RIVER

A branch of the Murray River, the Edward River cuts through Denilliquin and rejoining the Murray River further east in the Murray and Barmah National Parks.

Lakes



LAKE MULWALA

A man-made reservoir created through the construction of the Yarrowonga Weir. The Lake serves as the connection between the towns of Yarrowonga and Mulwala, and is popular for watersports and private boating.



LAKE HUME

Lake Hume is the primary water storage for the Murray Darling Basin, which stores water for downstream use. The lake is popular for sailing.



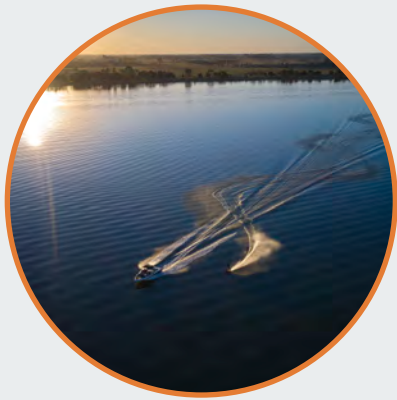
GUNBOWER

Provides visitors with access to multiple waterways, including Gunbower Creek, Murray River, Little Murray River, Kerang Lakes and Loddon River.



BARMAH

A National Park with access to the Murray River, Moira Lake, Barmah Lake, Barmah National Park and surrounding creeks.



LAKE BOGA

Lake Boga a freshwater endorheic lake that is managed by Goulburn-Murray Water as a water storage. It is popular for water sports and powered boating.



KERANG LAKES

Just north of Kerang, Lake Charm and Kangaroo Lake are the most popular for campers, waterskiers, boating enthusiasts, as well as fishing on the smaller lakes.



BUNDALONG - COROWA

A nature-based hub with access to multiple waterways including Lake Mulwala, Murray River, Ovens River and Lake Moodemere.



WONGA WETLANDS

Downstream of Albury, Wonga Wetlands has been created from the city's reclaimed water treatment system. It is home to 350 varieties of birds and seven inter-linked lagoons.

Nature-based Hubs

CRUISING OFFER AND VISITOR ENGAGEMENT

Waterway Utilisation by Past Visitors¹

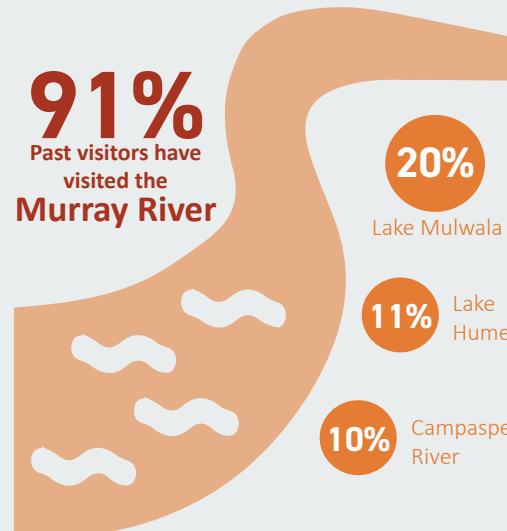
The overwhelming majority of visitors to the Murray region visited the Murray River on their past trip (91%). This is informed by a past visitor survey undertaken in 2021/22.

Visitation to other water bodies is extremely low. This is likely due to a lack of awareness, as well as a lack of commercial activation of these water bodies. There is opportunity to encourage visitor dispersal to other waterways within the region and promote connections between the Murray River and adjoining waterways.

The most common water activities undertaken by past visitors were swimming (40%) and general sightseeing (31%). The most popular boating activity undertaken was a paddlesteamer cruise (25%), an iconic Murray River heritage-based experience. This links to the high visitation to Echuca-Moama, which has a strong association in the market with paddlesteamers and the Murray River.

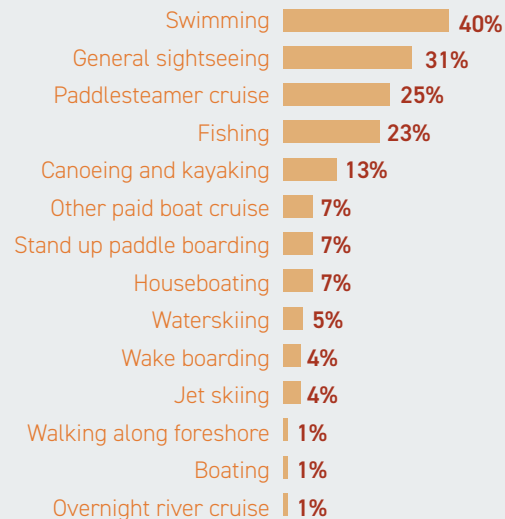
Overall, there was relatively low engagement in paid water-based activities, which reflects poor market awareness, limited broad market appeal of the existing cruising offer, and poor access to cruising and boating experiences for the general visitor market.

PAST WATERWAYS VISITED



There is less than 10% visitation to each of the remaining Murray region waterways.

WATER ACTIVITIES UNDERTAKEN



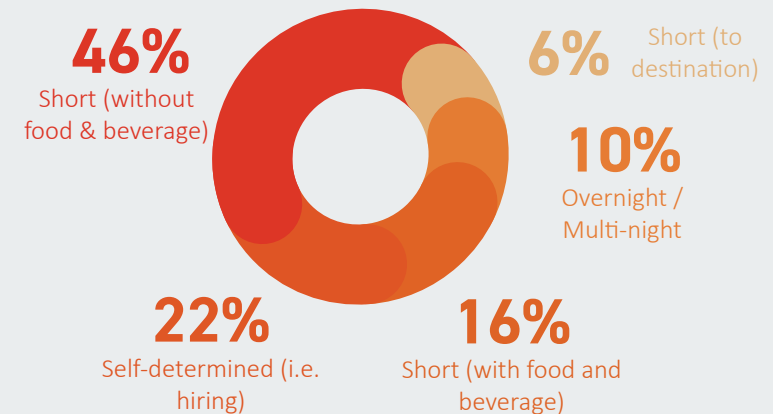
Existing Cruising Offering²

79% of cruising experiences are concentrated in the hubs of Mildura and Echuca-Moama. There is poor access to cruising experiences outside of these key hubs, as demonstrated in the adjacent map.

Echuca-Moama and Mildura contain comparatively high levels of cruising activity, predominately houseboats and paddlesteamers. This is as a result of mooring infrastructure, relatively stable water levels due to weir infrastructure, high levels of holiday-leisure visitation.

Yarrawonga-Mulwala and Albury-Wodonga are strong visitor destinations, however there is a gap in commercial cruising in these locations. Visitation to Yarrawonga-Mulwala is driven by holiday home ownership and high levels of private boat ownership, whereas Albury-Wodonga is driven by business and VFR travel.

The Murray's existing cruise boat fleet is basic in quality, lack supporting on-board amenity and product offering. Although, paddlesteamers provide visitors with a unique opportunity, they generally only offer basic food and beverage experience, if at all. Aside from some houseboats, the Murray region lacks luxury cruising experiences, as well as private group cruise experiences.



¹Murray region Past Visitor Survey, Urban Enterprise 2021.
²Urban Enterprise Cruising Experience Audit, 2021.



NAVIGATING THE MURRAY

Regulating structures such as weirs and locks were constructed along the Murray River following the establishment of the River Murray Commission in 1917. The purpose of these structures is to:

- › Store water for consumptive use and to regulate river flow downstream; and
- › Provide a raised river level upstream of the weir to improve the navigability of the river (vessels can navigate through the weir via its lock).

The water stores behind weirs (weir pools) provide bodies of water at higher levels. In addition to allowing water to be diverted for agricultural, domestic and industrial use, weir pools and locks enable recreational use of the Murray River.

There are 14 weirs along the Murray River, 8 of which are located in the Murray region. The weirs at Mildura, Torrumbarry and Yarrawonga were constructed primarily for water supply, rather than navigation.

Additionally, the Yarrawonga weir does not include a navigation lock, preventing vessels from passing through. The Hume Dam is located east of Albury-Wodonga and is the main supply storage for the River Murray system.

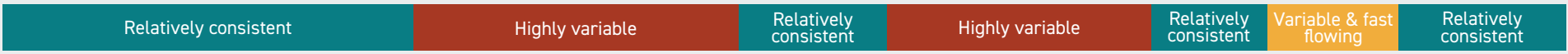
Given the primary role of the Murray River as a water source for farming and communities, flow regulation and water diversion for irrigation can cause high levels of water fluctuation. This is more common in areas that lack weir and lock infrastructure, and greatly impacts the reliability of boating and other recreational uses, and can impact business viability. Fluctuating water levels also make it difficult to implement permanent riverside structures.





Legend

- River
- Lake
- National Park
- ▩ Marina
- ▩ Locks
- ⊗ Restricted Navigation (No Lock)
- ▬ Weirs



SUB-REGIONAL CONDITIONS ASSESSMENT

The below table provides a detailed comparative assessment of the sub-regional waterway conditions, considering the current ability of key waterways to support cruising.

This includes an assessment of supporting infrastructure, navigating conditions, local environmental conditions, an overview of existing operators, and strengths and challenges associate with cruising.

WESTERN MURRAY



Image location: Murray River, Mildura
Image credit: Robert Blackburn

KEY WATERWAYS

- › Murray River
- › Darling River

VESSEL TYPES SUPPORTED

- › Houseboats
- › Larger vessels
- › Paddlesteamers
- › Canoe/kayaks

KEY OPERATORS

- › All Seasons Houseboats
 - › Murray Darling Houseboats
- › Mildura Houseboats
- › Mildura Paddlesteamers

KEY INFRASTRUCTURE

- › Locks 7-11
- › Mildura Wharf
- › Mildura Dockside Marina

NAVIGATING CONDITIONS

Highly reliable water levels due to the number of locks/weirs.

STRENGTHS

- › Highly consistent water levels due to weirs.
 - › Navigable for vessels due to locks.
- › Strong houseboat market and private marinas.
- › Established cruising operations in Wentworth.
- › Mildura dockside Marina currently at capacity with most berths full.

CHALLENGES

- › Poor commercial activation of the Mildura Riverfront.
- › Lack of commercial equipment and boat hire operators.
 - › Small wharf at Mildura constrained for mooring expansion.

MID-WESTERN MURRAY



Image location: Murray River Road Bridge
Image credit: Visit Swan Hill, Ewen Bell

KEY WATERWAYS

- › Murray River
- › Lake Charm
- › Lake Boga
- › Kangaroo Lake
- › Loddon River

VESSEL TYPES SUPPORTED

- › Canoe/kayaks
- › Small, powered boats
- › Paddlesteamer

KEY OPERATORS

- › You Canoe Watersport Hire
- › Wetlander Cruises
- › Murray River Adventures
- › Cohuna Adventures
- › PS Pyap

KEY INFRASTRUCTURE

- › Koondrook Wharf

NAVIGATING CONDITIONS

Highly variable and shallow due to lack of locks/weirs.

STRENGTHS

- › Gunbower Creek and Kerang Lakes are highly suitable for paddle sports and boating.
- › Gunbower National Park has the opportunity to become an iconic attraction.

CHALLENGES

- › Highly volatile, particularly given there are no weirs to maintain water levels.
- › Very shallow water levels in Swan Hill impacts viability of cruising.
- › Limited space for the public to moor in Swan Hill.

CENTRAL MURRAY



Image location: Echuca Wharf
Image credit: Emily Godfrey

KEY WATERWAYS

- › Murray River
- › Campaspe River
- › Edward River
- › Moira Lake

VESSEL TYPES SUPPORTED

- › Paddlesteamers
- › Houseboats
- › Canoe/kayaks
- › Small, powered boats

KEY OPERATORS

- › Kingfisher Cruises
- › Murray River Paddlesteamers
- › Echuca Paddlesteamers
- › Luxury on the Murray Houseboats
- › Murray River houseboats
- › Moama on Murray Resort Houseboats
- › Echuca Luxury Houseboats
- › Edward River Houseboats
- › Barberosa Houseboats

KEY INFRASTRUCTURE

- › Torrumbarry Weir and Lock 26
- › Deep Creek Marina
- › Port of Echuca

NAVIGATING CONDITIONS

Somewhat consistent due to Torrumbarry Weir.

STRENGTHS

- › Edward River at Deniliquin provides a calm waterbased experience, suitable to children and families.
- › Strong existing market for paddlesteamers and houseboats at Echuca-Moama.

CHALLENGES

- › Need for pontoons and other access infrastructure on the Edward River.
- › River fluctuations impact cruising and houseboat operations around Echuca-Moama.
- › Silting around Port of Echuca impacts commercial cruising as vessels can become stuck.
- › Poor condition of houseboats, canoes and other craft.
- › Need for increased riverside amenity and landscaping.
- › Lack of capacity for additional moorings in Echuca.

MID-EASTERN MURRAY



Image location: Lake Mulwala
Image credit: Robert Blackburn

KEY WATERWAYS

- › Murray River
- › Lake Mulwala
- › Barmah Lake
- › Ovens River
- › Lake Moodemere

VESSEL TYPES SUPPORTED

- › Paddlesteamers
- › Houseboats
- › Canoe/kayaks
- › Small, powered boats
- › Sailing (Lake Mulwala)

KEY OPERATORS

- › The Sienna Daisy
- › Lake Mulwala Barby boats
- › PS Cumberoona
- › Cobba Paddleboat Cruise
- › River of Islands Houseboat
- › MV Paradise Queen
- › Lake Mulwala Sportsfishing

KEY INFRASTRUCTURE

- › Yarrowonga Weir

NAVIGATING CONDITIONS

Highly variable between Barmah and Yarrowonga; relatively consistent upstream of Yarrowonga however narrow sections of river.

STRENGTHS

- › Stable water levels upstream of Lake Mulwala.
- › Lake Mulwala, Ovens River and Lake Moodemere suitable for paddle sports.
- › Barmah National Park has the opportunity to become an iconic nature-based destination.

CHALLENGES

- › No lock located at the Yarrowonga Weir, which prevents boats from passing through.

EASTERN MURRAY



Image location: Noreuil Park, Albury
Image credit: Robert Blackburn

KEY WATERWAYS

- › Murray River
- › Lake Hume

VESSEL TYPES SUPPORTED

- › Canoe/kayaks
- › Small, powered boats
- › Sailing (Lake Hume)

KEY OPERATORS

- › Lake Hume Hire and Guided Fishing Tours
- › Murray River Canoe Hire
- › Canoe the Murray

KEY INFRASTRUCTURE

- › Hume Weir

NAVIGATING CONDITIONS

Highly variable and shallow due to lack of locks/weirs.

STRENGTHS

- › Large residential market and VFR market.
- › Large capacity in commercial accommodation to support visitors.

CHALLENGES

- › Lack of commercial operators at Lake Hume.
- › Highly volatile water levels at Lake Hume with little notice due to water release for irrigators and environmental flows downstream.

Cruising Demand Analysis

This section presents consumer demand, expectations and trends in consumer preferences for accommodation, as informed by consumer research including:

- › Research of past visitors to the Murray region (972 survey responses from predominately holiday leisure visitors during the 2021/22 summer period).
- › Consumer research of the Australian market (representative survey sample of 2,000 Australians) that shows potential visitor market preferences.

DEMAND FROM EXISTING MARKET¹

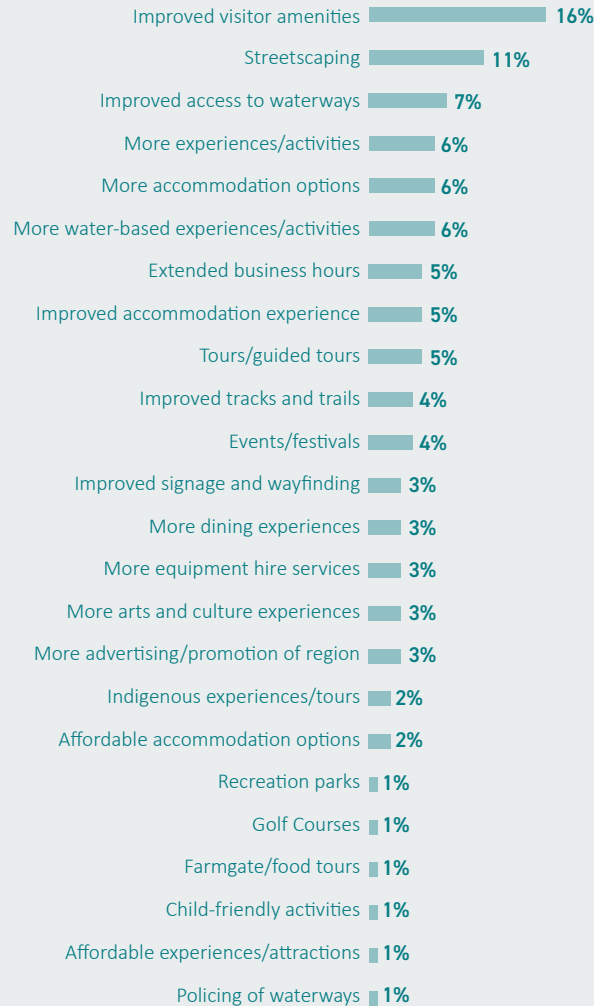
Regional Experience Improvements

Past visitors to the Murray Region identified infrastructure and visitor amenities within the region as a key area for improvement.

Within the existing visitor market, there is strong desire for improved access to and activation of waterways, more water-based experiences and activities, tours and guided tours and more equipment hire services.

Waterway experiences can be improved through foreshore amenity upgrades (toilets and picnic tables), on-water dining and better swimming access.

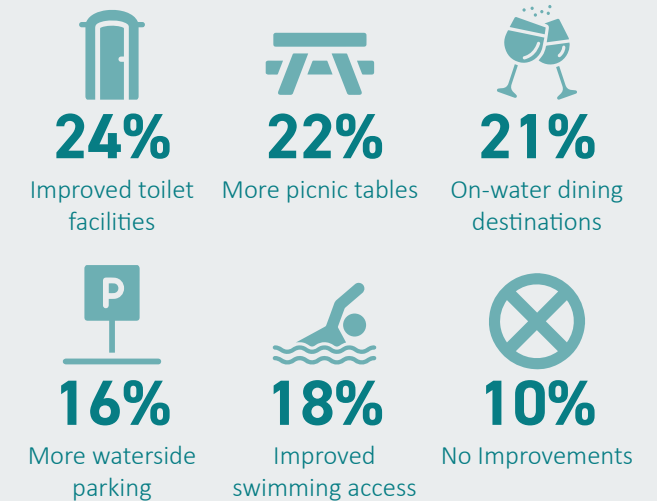
IMPROVEMENTS TO REGIONAL EXPERIENCE



Improvements to Existing Waterways

Past visitors to the Murray region reported that the key waterway experience improvements required are toilet facilities (24%), picnic tables (22%), on-water dining destinations (21%) and improved swimming access (18%). This demonstrates the need to develop foreshore amenity and facilities to improve visitors engagement with the Murray River and surrounding waterways.

IMPROVEMENTS TO WATERWAYS



10% Did not visit waterway, 8% More equipment hire available, 7% Improved quality boat ramps, 7% Increase fishing access, 6% Nearby fishing equipment hire, 6% Nearby boating equipment, 4% Additional mooring facilities.

¹Murray Region Past Visitor Survey, Urban Enterprise 2021.

42% of the Victorian boating market commonly utilise inland waters, 20% of whom prefer to boat on the Murray River.

MOST COMMON WATERWAYS FOR BOATING



CRUISING DEMAND IN VICTORIA

In August and September 2014, Transport Safety Victoria conducted a survey of 1,035 Victorian registered boaters, with the aim of understanding Victorian recreational boaters' behaviour and attitudes regarding safety, waterways and boating infrastructure¹.

For those who boated on inland waterways, the most popular body of water was Lake Eildon (25%), followed by the Murray River (20%). Survey respondents indicated that the main area of improvement for Victoria's waterways should be better/increased access to ramps and launching facilities. This suggestion was echoed in the qualitative research undertaken, where participants reported they wanted to see more destinations with places to tie up, such as marinas.

The most popular time of year for boating within Victoria is between October and April (84%). The most common purpose for undertaking boat trips is fishing (64%), followed by water sports (18%) and touring/cruising (17%).

PURPOSE OF BOAT TRIP



BOAT USE TIMES

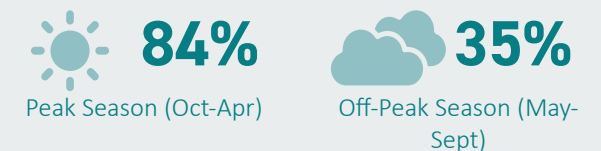


Image location: Murray River, Echuca
Image credit: Robert Blackburn

¹Boating Behaviour, Transport Safety Victoria, 2015.

Target Markets

The domestic visitor market segments for the Murray Region account for 5.1 million Australians, or 34% of the Australian population aged between 18 and 75.

All market segments have potential to be engaged in commercial cruising, with a range of experiences of interest to each market. This reinforces the potential of the Murray region to own cruising and develop as the leading destination for an inland boat cruise.

The market represents those who regularly travel (i.e. at least once every two years) and are interested in visiting the Murray in future.

Common preferences amongst all market segments is engaging with nature, food and wine experiences and relaxing in beautiful accommodation. This reinforces the shift of the wider Australian market towards escaping the city to a relaxing, nature-based setting and indulging in food and wine.

It will be important to target each market with cruising experiences relevant to their

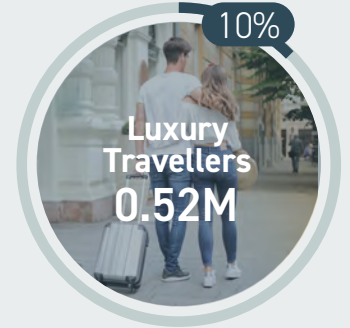
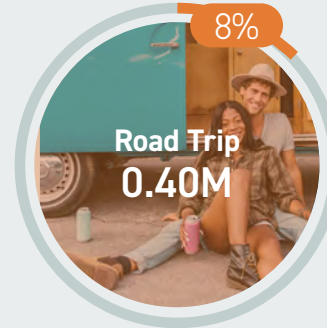
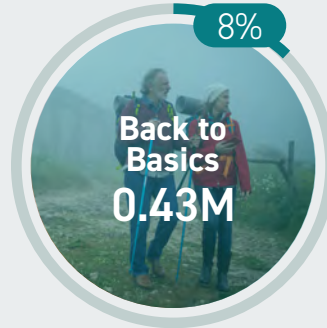
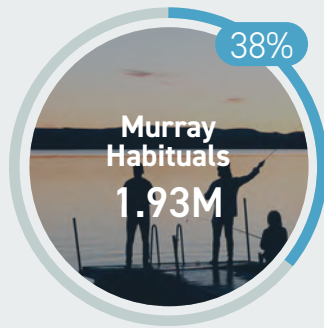
preferences and interests. In particular, there is a major opportunity to target the Explorer and Discoverer market with a range of boat cruise experiences, being the largest market who are most open to trying new experiences. In addition, the Luxury Traveller presents a key opportunity for luxury and high quality overnight cruises, as well as day cruises that include dining experiences or visits to wineries.

Further detailed analysis of target market segments has been provided through the Murray Region Consumer Research Project.



OVERVIEW OF DOMESTIC VISITOR MARKET SEGMENTS

Segment Size and Proportion of Murray Region Visitor Market



Segment	Overview	Who Are They?	Accommodation Preferences
Murray Habituals	The traditional Murray visitor who travels to the Murray at least once every two years- the Murray's biggest advocate.	<ul style="list-style-type: none"> › All ages and travel groups › Mostly VIC (51%) and NSW (26%) › Self-sufficient travellers › Stay for long trips during peak periods 	<ul style="list-style-type: none"> › Self-contained › Caravan park › Motel
Back to Basics	The simple traveller, the free spirit- escaping to nature to press pause on real life, spend time with loved ones, and hit reset.	<ul style="list-style-type: none"> › Mostly 40-60 yrs old without children or with adult children › Preference for longer stays at any time of year (49%) 	<ul style="list-style-type: none"> › Self-contained › Caravan park › Houseboat › Free camping
Road Trip	Inspired by the freedom of a road trip, this market wants to explore the country, see new destinations and escape the city.	<ul style="list-style-type: none"> › Mostly NSW (31%) and VIC (22%), with a high proportion of people born overseas › Take longer trips less frequently › Young couples, friends, families with older children, grey nomads 	<ul style="list-style-type: none"> › Self-contained › Motel › Serviced apartment/unit
Explorer & Discoverers	Socially conscious and adventurous travellers, open to travelling to new destinations and seeking new, unique experiences	<ul style="list-style-type: none"> › Young families and singles, mostly aged 18-40 › Low-middle income earners › Travel on weekends and more frequently throughout the year 	<ul style="list-style-type: none"> › Self-contained › Resort › Luxury hotel
Luxury Travellers	With a holiday mindset of indulgence, the luxury traveller seeks relaxation achieved through high quality experiences.	<ul style="list-style-type: none"> › Mostly older travellers, predominately adult couples › Higher income › Likely to travel midweek or any time of year 	<ul style="list-style-type: none"> › Self-contained › Resort › Luxury hotel

What is cruising about for this market?

Murray Habituals

"I hadn't really thought about it because I come here all the time... if I could visit a new winery by boat or hire a stand up paddleboard I probably would."

Back to Basics

"I'm not that interested in sitting on a boat, but if I can put some elbow grease into it and do it myself, like kayaking in the wetlands, that would be cool"

Road Trip

"I want to explore my backyard and get to know Australia – I'd like to hire my own boat and explore the river myself. I like the idea of that freedom."

Explorer & Discoverers

"For me, a boat experience would be a way to see things I can't see from the shore, or do something no one else has done."

Luxury Travellers

"Cruising is about luxury and putting my feet up with a glass of wine in my hand and the wind in my hair."

What type of cruising and boating experiences is this market interested in?

- › Most likely to stay on a houseboat (45%) – houseboat hiring with a group of friends / relatives
- › For this 'do-it-yourself' market, there is real opportunity to engage them in private boat hiring for those that don't have their own boat (e.g. paddleboats, canoes)

- › Seek an escape from the city
- › Prefers a more secluded cruising experience with their travel group
- › Attracted to a nature cruise, with experiences such as wildlife watching (39%) or wetlands experiences (44%)
- › Most interested in staying on a houseboat (44%) with their travel group to experience the Murray
- › Not interested in an overnight cruise

- › Most likely to undertake an overnight cruise (35%) – interested in seeing a number of destinations along the Murray
- › Most willing to engage in a longer cruise – 47% would undertake 4 or more nights
- › Interested in paddlesteamer cruises and educational tours such as wildlife watching and wetlands – want to educate the kids and keep them entertained

- › Most likely of all markets to hire a powered boat (30%)
- › More likely to undertake active and adventurous water-based activities, such as canoeing and kayaking (39%) and water sports such as jet skiing, water skiing, wakeboarding (38%)
- › Most interested in Aboriginal cultural tours
- › Will pay for a unique and authentic experience.
- › 64% most interested in cruising from one destination to another – desire for exploration

- › Professionals seeking spa, wellness and relaxation.
- › Visiting restaurants is a key motivation for undertaking a cruise for 63% of this market.
- › Interested in undertaking an overnight boat cruise and want it to be high amenity with a contemporary fit out – desire luxury accommodation (26%) and luxury boat (18%)
- › 1-3 nights is the sweet spot for an overnight cruise (70%)

How to engage this market?

- › Social media
- › Marketing campaigns, such as VFR campaigns and promotions to rate payers
- › Incentives to engage such as discounts
- › Delivery of information through existing channels e.g. boating and fishing clubs

- › Social media
- › Visitor information at key camping sites
- › Delivery of information through existing channels they use e.g. boating and fishing clubs

- › Social media
- › Online cruising itineraries to inspire trip route planning
- › Promotion of equipment hire in town centres and promote at visitor information points
- › Provide mid-week deals to attract this market

- › Social media
- › Adventure travel packages
- › Deliver onboard bar and live music to appeal to this market
- › Food quality is important, including restaurant visits and high-quality on-board dining experiences.

- › Social media
- › Luxury travel packages, which may include golf passes and arts and cultural experiences
- › Provide spa and wellness activities such as on-board massages
- › Food quality and a sense of luxury is most important

Strategic Considerations

This section presents the strategic considerations for development of the Cruising sector, as informed by primary market research, industry engagement, assessment of challenges and opportunities for cruising development, and infrastructure needs.





EXISTING OFFERING

Opportunity for investment in new multi-dimensional cruising offers, and expansion of existing offers. Many existing cruising experiences are one-dimensional and provide limited active engagement or supplementary products and experiences for passengers. There is opportunity for operators to include nature based, Aboriginal, food and wine experiences in conjunction with their cruise offer.

Strong opportunity and consumer demand for riverfront commercial activation. There has been substantial investment in riverfronts within Murray Region towns. Leveraging off this investment, there is opportunity to support commercial cruise operators and other vessel hire at waterfronts to increase activation.

Market opportunity to deliver commercial cruising, as there are limited cruise experiences for the broader market without access to a private vessel or water craft. The broader market without private craft has limited access to the full range of cruising experiences. There is opportunity to expand hiring of craft and vessels including kayaks, canoes, stand up paddle boards and boat hire.

Need for focused investment at existing visitor hubs and destinations. Cruising experiences are currently dispersed across the region, with some located away from key townships. There is need to anchor cruising experiences to existing visitor destinations, and ensure they leverage the existing visitation base.

Some existing offerings are outdated and poor quality, impacting consumer satisfaction and ability to target new markets. Much of the existing cruise offer is dated in terms of the vessel amenity being offered to the public. There has been limited recent investment in contemporary cruising vessels to meet market demand.



ACCESS AND AMENITY

Need for improved foreshore amenity and facilities. Visitors initially engage with the Murray region's waterways through riverfront and foreshore areas. There is a need to improve foreshore amenity and facilities to provide visitors with a more enjoyable water-based experience.

Limited mooring access for private boating. Increased access to ramps and launching facilities along the Murray River are required to meet the needs of the recreational boating market who own their own personal craft.

Temporary moorings at visitor hubs are needed to encourage waterway use and dispersal into town centres. There is a lack of temporary moorings across the length of the Murray, including in townships and at key experiential destinations (e.g. wineries, restaurants etc.). This acts as a barrier to investment in cruising and limits the location and journey of existing cruise operations. There is significant opportunity to link cruises with on-land experiences; which would need to be facilitated by additional mooring infrastructure.

Strong cruising hubs in Mildura and Echuca-Moama, however poor access to cruising experiences outside these destinations. There is opportunity to deliver increased cruising experiences in high visitor locations such as Albury-Wodonga and Yarrowonga-Mulwala. In particular, Lake Mulwala and Lake Hume provide a ripe opportunity for investment in cruise experiences.



PHYSICAL BARRIERS TO CRUISING

Water flows. High water flows impact on the safety and viability of cruising at destinations downstream of larger weirs (Lake Hume and Lake Mulwala).

Restricted navigation along the entire length of the Murray River. The Murray River is not navigable from Mildura to Albury, due to a lack of locks at Yarrawonga Weir and Hume Dam.

Snags. Snags are a physical barrier to various forms of river cruising. Additionally, there is a reluctance to remove these for habitat reasons.

Vessel size restrictions due to variable river depths and widths, which presents opportunity for Lake cruising and intimate river cruises. Larger vessels are restricted from operating on the Murray River, due to the variable depth and width of the river, as well as other physical barriers restricting vessel height such as overhead power lines and bridges.



ENVIRONMENTAL CONSIDERATIONS

Drought and flooding can occur which impacts cruising operations. Water storages can be used to mitigate these effects, depending on their timing and duration.

River and lake-bed erosion is linked to waterway activities such as boating. The use of land close to a waterway for moorings or water access can compromise soil on the riverbank. Additionally, boating can create a wave action in the water body that washes against the riverbank and causes erosion. There is a need for infrastructure such as retaining walls to mitigate erosion.

Impact of blue-green algae on waterway access and utilisation. Consultation with governing bodies for the Murray River indicated a preference for boating activities to occur in storages (e.g. Lake Hume, Lake Mulwala), where the impact on erosion and blue-green algae is lowered. This presents an opportunity for increased cruising offerings in these locations.



OPERATIONAL AND INVESTMENT CHALLENGES

Inconsistent business operations due to external factors. Consistent business operations are limited due to staff shortages, a limited demand for cruising in the off season and an inability to plan calendar due to unpredictable river levels.

Staff skill shortages impacting operations of paddlesteamers and other vessels. There is a shortage of appropriately qualified steam wrights, boat builders and boat maintenance staff required to service the paddlesteamer industry as well as the broader cruising sector.

Cost of boat maintenance and high insurance costs impacts business viability for smaller operators.

Changing water depths and flows impacts business operations. Water in the Murray Darling Basin is owned by irrigators, meaning there is little control over water depth and flows. This impacts on the consistency and reliability of business offering.

Complex and difficult to navigate governance structure. The management of the Murray Darling Basin is highly complex and involves a large number of Government stakeholders and authorities. Navigating this management structure is a potential deterrent for new cruising operators, the expansion of existing cruise businesses or investment in infrastructure.

Need for information to facilitate investment in new cruising businesses. Establishing a cruising operation in the Murray Region involves liaising with a number of government agencies and attaining various forms of documentation and licencing. At present, the process required to establish a cruising business is not readily available to potential investors/businesses in a consolidated and accessible format.



CONSUMER DEMAND FOR CRUISING

Market potential and strong interest in a range of cruise experiences. Cruise operators in the Murray should offer a variety of journey and experience options to maximise potential market size.

Opportunity to integrate additional experiences into cruising offer to meet market demand. Consumer demand for ancillary experiences as part of a cruising journey, such as dining, heritage and nature experiences, highlights the need and opportunity for cruising operators to link their offer with other visitor experiences in the Murray region, such as visiting restaurants, natural attractions and heritage experiences.

Preference for a short day cruise experience. The preferred length for a day cruise experience in the Murray region is between 1.5 hours and half a day in length.

Preference for a short, 2-3 night overnight cruise. Two to three nights is the preferred length for an overnight cruise experience in the Murray Region, with luxury accommodation preferred.

Cruising will connect and integrate existing and future Murray region products. There is opportunity for cruising to be the key form of transport and key way to experience the Murray region and its products and experiences. This will differentiate the Murray region from all other destinations in Australia.



CONSUMER AWARENESS

Poor awareness of Murray region waterways and natural assets. There is major potential to grow demand through awareness. There is limited awareness of key waterways and parks in the region, with the exception of the Murray River. There is a need to activate these assets through increased promotion and investment in commercial offerings.

Enhanced marketing and promotion. Increased marketing and promotion is needed to increase the likelihood of visitors booking a waterway experience in the Murray region.

Poor online presence of existing operators and opportunity for new operators to deliver high quality digital experiences. Outdated branding and webpages, as well as difficult booking processes and lack of consistency in business operational hours / lack of forward timetable, are a deterrent to visitors booking a cruising experience.

There is no single location to book a cruising experience online. There is potential to establish a 'Cruising the Murray' website (or micro-site) that includes an integrated booking service.



RESPONDING TO UNIQUE LOCAL CONDITIONS

WESTERN MURRAY

Strategic Opportunities

- › Commercial operators to provide access to public boating and equipment hire services, operating centrally from Mildura Riverfront.
- › Additional multi-day cruises from Mildura to Echuca.
- › Floating Restaurant on Murray River.
 - › Iconic Murray River Indigenous cruising experience, linking with on-land experience at Mungo National Park.
- › Paddle sports hub, Mildura.

Infrastructure Needs

- › Enhancement and expansion of Bruce's Bend Marina to facilitate further houseboats.
 - › Enhancement to and expansion of public wharf at Mildura Riverfront.
 - › Canoeing and paddle boarding equipment hire.

MID-WESTERN MURRAY

Strategic Opportunities

- › Kayak tours on Little Murray and Gunbower Creek.
- › Indigenous cruises including native food experiences.
- › Regular paddlesteamer cruises from Koondrook connected to Swan Hill and Echuca.
- › Relocation of Wetlander Cruises to Barham / Koondrook and enhanced offer.
- › Kayaking between Cohuna and Koondrook as part of the Murray River Adventure Trail, connected to nature-based accommodation at Gunbower Creek.
- › Little Murray River canoeing and paddleboarding.

Infrastructure Needs

- › Weir in Swan Hill.
- › Public wharf at Swan Hill with mooring points.
- › Little Murray River enclosed swimming pool.
- › Additional mooring points to allow access to Gunbower National Park.

CENTRAL MURRAY

Strategic Opportunities

- › Medium size houseboat cruising along the Edward River.
- › Kayak tours and eco tours on the Edward River.
- › Night-time cruises from Echuca-Moama.
- › Floating restaurant on Murray River.
- › Paddle sports hub at Echuca.

Infrastructure Needs

- › Additional mooring infrastructure in Echuca-Moama (both temporary and permanent).

MID-EASTERN MURRAY

Strategic Opportunities

- › Thompsons Beach riverside activation, equipment hire hub and potential wharf development.
- › Expansion of nature-based cruising opportunities at Barmah National Park and between Bundalong and Corowa.
- › Support development of Kingfisher Cruises as an iconic regional eco-tourism experience.
- › Opportunity to link cruising experiences to nearby wineries in Rutherglen.
- › Water taxis on Lake Mulwala to service both towns and accommodation (e.g. Sebel).
- › Bundalong to Squires Winery cruise link.
- › Floating restaurant on Lake Mulwala.

Infrastructure Needs

- › Investment at Barmah National Park Launch Site and potential commercial activation.

EASTERN MURRAY

Strategic Opportunities

- › Lake Hume sailing.
- › Link Wonga Wetlands to the Murray River through a cruising experience.
- › Floating restaurant on Lake Hume.
- › Aboriginal cultural tour and nature based tour.
- › Paddle sports hub at Albury Riverfront.

Infrastructure Needs

- › Mooring points at Burrinja Indigenous Cultural and Environmental Discovery Centre and link to sculptural trail and Wonga Wetlands
- › Wodonga Creek activation, landscaping, mooring infrastructure and paddle boarding hire.

VISION



Cruising will be established as the most compelling and iconic Murray Region visitor experience, which unifies and strengthens the regional product offering.

OBJECTIVES

1

Grow the number of visitors engaging in paid cruising experiences on the Murray River and key waterways across the region.

2

Establish river cruising as an iconic and uniquely 'Murray region' experience.

3

Establish iconic cruise experiences that link to existing and potential product strengths of the Murray – food, wine, nature based, indigenous and heritage.

4

Drive demand in new markets by developing cruise experiences aligned to market preferences.

5

Support development of vibrant and activated cruising hubs through investment in existing cruising precincts and establishment of new precincts at emerging visitor destinations.

6

Encourage dispersal of cruising product across the length of the Murray that leverages the unique local physical conditions and local product and experience strengths.

7

Strengthen the link between cruising product and other Murray region product pillars and hero experiences.

8

Provide supporting hard and soft infrastructure to enable the development of the cruising sector.

STRATEGIC INVESTMENT THEMES

The following themes have been prepared which respond to the opportunities and needs to support cruising investment and expansion in the Murray Region.



Multi-day Cruise Experience

Deliver multi-day cruise experiences on the Murray that establish the region as a leader in inland water cruising in Australia.



Day Cruise Experience

Create a diversity of day-cruise experiences by improving the existing cruise offer and investing in new cruise experiences at locations with limited cruising activity.



Hiring, Touring and Transport

Establishing the Murray as the premier water cruising and access destination, with high levels of accessibility to quality products, equipment and tour experiences.



Enabling Infrastructure

Deliver the supporting infrastructure and investment required at water access points and at key locations to enable cruising.

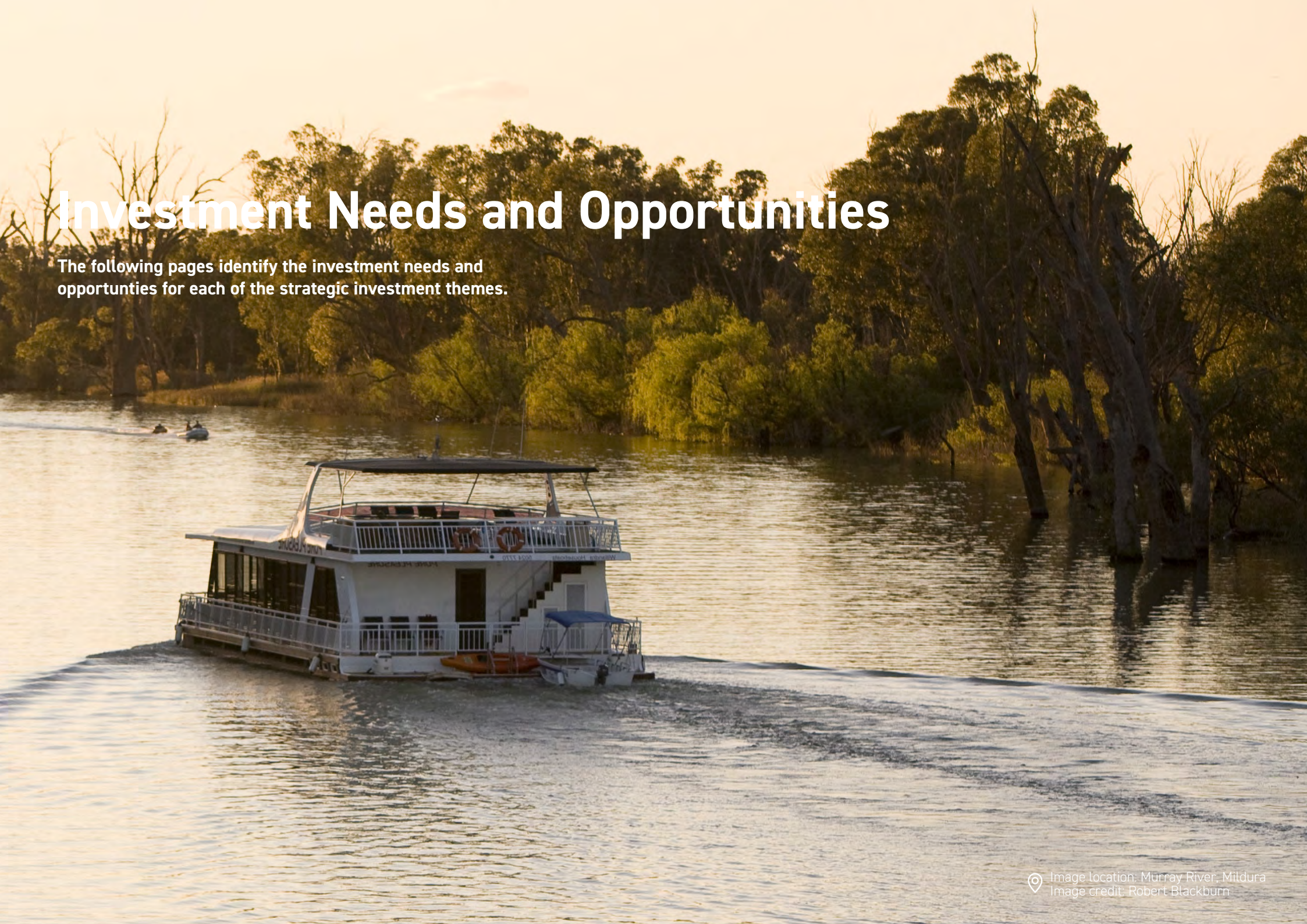


Supporting Investment in Cruising

Establish a supporting framework, with consideration of streamlined governance, collaborative marketing and quality visitor information to support cruising.

Investment Needs and Opportunities

The following pages identify the investment needs and opportunities for each of the strategic investment themes.



THEME 1 MULTI-DAY CRUISE EXPERIENCES



Mildura Luxury Multi-day Cruise

- Mildura
- 1-7 nights
- On-board, luxury accommodation
- Private sector investor

Multi-day cruise experience departing from Mildura Wharf, travelling both upstream or downstream and stopping at various points along the River.

Potential routes include:

- › Mildura to Wentworth (approx. 1-2 nights, one way)
- › Mildura to Robinvale (approx. 3-4 nights, one way)
- › Mildura to Renmark (approx. 5-7 nights, one way)

Project requires a new luxury vessel tailored to this part of the Murray. Many locks and weirs ensure that this part of the Murray has consistent water depth and suited to a larger vessel. Consideration needs to be made to the size of the locks that are needed to be navigated through.

Investment and expansion of the Mildura wharf is required to support a new large vessel.

Echuca Multi-day Paddle Steamer Cruises

- Echuca
- 1-2 nights
- On-board, luxury accommodation
- Private sector investor

Multi-day paddle steamer cruise experience departing from the Port of Echuca, stopping at various points along the River. Potential routes include:

- › Echuca to Torrumbarry (approx. 1-2 nights, one way)
- › Echuca to Koondrook (approx. 3-4 nights, one way)
- › Echuca to Swan Hill (approx. 5-7 nights, one way)

Investment in this project is a priority for the Murray region. The vessel will be moored at Echuca, home of historic paddlesteamers in Australia. This vessel will create a new iconic experience for the Murray and have potential in both domestic and international markets.

Further investment in mooring infrastructure in and around Echuca is needed to accommodate an expanding fleet of vessels in the region.




PS Emmylou, Echuca



Li River Cruise, Guilin



Yarrawonga – Corowa Whiskey and Wine Multi-day Winery Cruise

-  Yarrawonga – Rutherglen (return)
-  1-2 nights
-  On-board, luxury accommodation
-  Private sector investor

Multi-day cruise, departing from Yarrawonga foreshore and travelling upstream to wineries in the Rutherglen wine region. This will create a link between icons of Victoria – The Murray River and famous wineries of Rutherglen. Inclusion of the Corowa Whisky factory on the tour would also be well placed as part of the offer.

This requires new overnight moorings in:





- › Corowa
- › Bundalong
- › At wineries in Rutherglen

Wineries to consider include:

- › St Leonards Winery
- › All Saints Estate
- › Pfeiffer Wines

The vessel for this cruise would need to be small with a low draught in order to navigate the river upstream of the Lake Mulwala Wier.

Multi-day Canoe Trail

-  Entire length of the Murray
-  1-30 nights
-  At key towns, camping or eco cabins in State and National Parks
-  Murray Regional Tourism

The Murray River has potential to become one of the Australia’s greatest multi day paddling destinations. The river with fast moving current provides a an easily navigable and relatively safe paddling experience.

The journey along the Murray can be undertaken as a segment or in its entirety. There is a need to identify operators to support the project concept. Improved visitor information is needed to support the overall project.

Next Steps

----->>
Establish a project steering committee to oversee a cruising the Murray website with all paddling related information to be presented.



Trentham Estate, Mildura





Brunswick River Kayak Tours




Mighty Murray to Mungo Iconic Tour

 Red Cliffs, Mildura

 1-2 nights

 On-land accommodation at Mungo National Park


 Private sector investor

The Mighty Murray and Mungo National Park are two jewels of the Murray region. These two nature-based attractions have potential to become a hero experience for Murray operators.

At present, accessing Mungo National Park can be difficult with two wheel drives, and can be quite an isolated experience from the Murray River. There is opportunity to link the two products through a multimodal, land and water experience, which could include:

- › Beginning at Mildura
- › Stopover at Kings Billabong Nature Walk
- › River cruise to Red Cliffs
- › 4 wheel drive adventure to Mungo National Park
- › Overnight stay at Mungo National Park
- › Small-scale return cruise from Mungo to Mildura via Darling River




 Image location: Perry Sandhills, Wentworth
Image credit: Roberto Seba

THEME 2 DAY CRUISE EXPERIENCE



Lakes Restaurant Cruise

 Lake Mulwala, Lake Mulwala

 Private sector

Lake Mulwala and Lake Hume are two of the key in land lake assets in Victoria. Both are highly popular boating destinations.

The large population base in Albury Wodonga and growing visitor market provides a strong catchment for restaurant cruises on Lake Hume.

Lake Mulwala is a picturesque waterway with reliable water. Its growing visitor economy and large residential catchment also make it an excellent location to establish restaurant cruises. This would complement the newly built Sebel hotel.

Lake Mulwala has good mooring facilities to accommodate the above use, however Lake Hume requires improvement to mooring or the establishment of a new Wharf to accommodate a restaurant cruise. Bellbridge or Lake Hume Village precinct are best placed to accommodate a new wharf or mooring facility.

Winery and Nature Cruise

 Yarrawonga to Corowa and Bundalong

 Private sector

There is opportunity to accommodate a half day cruise experience departing from Yarrawonga, Corowa or Bundalong and travelling to Rutherglen Wine Region.

Investment in a vessel that can navigate the river upstream from Lake Mulwala is required. This may be moored at various locations to meet visitor demand across the year.

Destinations may include:

- › Corowa Whiskey and Chocolate Factory
- › Pfeiffer Wines
- › All Saints Estate
- › St Leonards

The cruise could include an eco tourism experience which interprets the environment upstream of Lake Mulwala and the intersection with the Ovens River.



Seine River Diner Cruise, Paris



Rum Runner Cruise - Husk Distillery, Tweed River



Lake Mulwala Nightlife Boat Cruise

- Lake Mulwala
- Minimum 2-3 hours
- Private Sector

Delivery of vibrant night time experiences are required to target the Young Traveller segment, and increase their spend and length of stay in the region.

Lake Mulwala provides a prime opportunity for a contemporary night-time cruise experience, due to the high levels of VFR and holiday leisure visitation, proximity to Melbourne and the open expanse of lake that would support this experience.

This cruise would include live music or a DJ, on board bar and food, a variety of seating formats such as bar stools and lounges, and could include an on-board spa or pool.



Cronulla Party Boats

Foraging Food Cruise

- Various locations across the region
- Minimum 2-3 hours
- Private Sector

Food is a major motivation for travel for the contemporary visitor market, particularly the opportunity to experience local produce and makers.

There is opportunity to deliver a food foraging cruise, whereby the cruise could include visits to farms, wineries and other experiences.

Cobram to Tocumwal Beaches Cruise

- Cobram to Tocumwal
- Full day
- Private Sector

Deliver a day river cruise experience linking Cobram with Tocumwal, offering an onboard dining experience and visits to a range of beaches.

This would be a popular cruise in summertime, supporting exploration of the two towns as well as allowing relaxation at the beaches.



Secret Beaches Harbour Cruise, Sydney



Gateway Island Aboriginal Cultural Cruise

Gateway Island, Wodonga

Traditional Owners

Aboriginal experiences are a major driver for visitation in both domestic and international markets, and provide a strong opportunity for Aboriginal economic development.

There is opportunity for Traditional Owners to develop an Indigenous cultural heritage cruise at Gateway Island, linking Burrinja Indigenous Cultural and Environmental Discovery Centre to sculptural trail and Wonga Wetlands.

Public sector investment in mooring infrastructure at the Mildura Riverfront is required to support this.



Tweed Eco Cruises

Nature-based Cruise

Yarrawonga/Corowa

Private sector

Development of day cruise experiences departing from Yarrawonga or Corowa, and travelling through upper Lake Mulwala and the Ovens River. This section of river and lake is particularly beautiful and provides a different nature-based experiences to other destinations.

There is an opportunity to service Murray River Adventure Trail (Corowa to Yarrawonga) through this experience.



Aquality Cruises, Hawkesbury River

Kingfisher Cruise Enhancement

Barmah National Park

Yorta Yorta Nation Aboriginal Corporation

Kingfisher Cruises is an extremely popular experience, providing a unique and intimate tour of the world heritage listed Barmah Wetlands. The business has recently been purchased by Yorta Yorta Nation Aboriginal Corporation.

There is a need to support the development and expansion of Kingfisher Cruises, as the potential to become an iconic regional eco-tourism experience. The delivery of Aboriginal storytelling and interpretation, both on board and on land.

There is opportunity to deliver multiple cruise types, including delivery of food experiences such as campfire barbecues or bush tucker experiences.


Investment in the Barmah National Park launch site and




Kingfisher Cruises



Enabling the Wetlander Wildlife Cruise

 Barmah/Koondrook


 Private sector


The Wetlander Cruises provide a high quality wetland tour experience, operating from the Gunbower Creek. There is opportunity to support development of the cruise, as well as to reinforce the town centre and increase visitor yield, by relocate the Wetlander Cruises to Koondrook or Barham.

This will support operation and reduce current operating constraints and issues faced as a result of boat deterioration from permanent mooring in the Gunbower Creek.

There is an opportunity to enhance the experience to include an Indigenous Cultural Heritage component, either on board or on land, as well as link to the Murray River Adventure Trail (Bike Gunbower) through this experience.

Fishing Tours

 Lake Mulwala, Albury, Swan Hill

 Private sector

There is an opportunity to expand the fishing tour offering across the region, with a range of small to midscale tours. These tours should take a focus on the Murray Cod.



Wetlander Cruises



Noosa River Fishing Safaris

THEME 3 HIRING, TOURING AND TRANSPORT



Paddle Sport Hubs

- › Mildura, Mildura Riverfront
- › Swan Hill, Riverfront at The Ten Steps
- › Koondrook, nearby Koondrook Wharf
- › Kerang Lakes, Lake Boga (nearby Lake Boga Yacht Club)
- › Cohuna, Cohuna Beach
- › Denilliquin, Mcleans Beach
- › Echuca, Onion Patch
- › Tocumwal, Tocumwal Foreshore
- › Cobram, Thompsons Beach
- › Corowa, Corowa Rowing Club
- › Yarrawonga, Yarrawonga Foreshore Reserve
- › Albury Riverfront, Noreuil Park Foreshore (River Deck Café)
- › Lake Hume, Lake Hume Village

The amenity and infrastructure at key paddle sports access points requires significant improvement to improve the visitor experience.

There is an opportunity for private sector activation in Paddle sport hubs. This would involve the establishment of a business model for paddle sports, involving equipment hire and guided tours.

These hubs could also include a food and beverage offering or other forms of boat hire.

Expand Boat Hire Fleet at Paddle Sport Hubs

- › Paddle Sport Hubs

Although recreational boating is a major driver of visitation to the Murray Region, waterways are difficult to access without a privately owned boat.

There is an opportunity to increase the number of boat hire locations and expand the region's hire fleet, to facilitate cruising experiences for the market without private craft.



Jetty 17 Boat and Kayak Hire, Noosa

Expanded Houseboat Offering

- › Mildura, Lake Mulwala, Lake Hume

Houseboats are an extremely popular cruising experience and accommodation option for the Murray Region. Currently, most houseboats operate out of Mildura and Echuca-Moama. There is opportunity to increase the houseboat offering at these locations, as well as on Lake Mulwala.


Additionally, there is an opportunity to introduce houseboats on Lake Hume.



Murray River Houseboats, Echuca



Moorings and Marinas to Support Houseboats

 Mildura, Lake Mulwala, Lake Hume

Investment in new and upgraded moorings and marinas to accommodate an increase in the number of houseboats.

In particular, there is opportunity to develop a new marina in Echuca-Moama at Horseshoe Bend Lagoon, 4km east of Moama, as well as expansion of Bruce's Bend Marina to support investment in houseboats.

Expand and promote multi-day tour offer

 Region-wide

 Private Operators/Murray Regional Tourism


There is opportunity to expand the existing multi-day canoe and kayak offer to include guided tours, additional starting locations and supporting product and experiences.

There is opportunity to provide links to the Murray River Adventure Trail through the development of a range of itineraries that incorporate on-land experiences such as cycling, walking and other adventure activities.

This could be supported by operator information and inventories offered on the corporate Cruising the Murray website.

Water taxi service model and feasibility study

 Region-wide

 Murray Regional Tourism

To develop the Murray Region as an iconic cruising destination, there is a need to embed cruising into the consumer psyche as the number one form of transport and the top experience as a visitor.

A feasibility study to explore a viable delivery model should be undertaken, which utilises water-taxis at key destinations to transport visitors.

For example, a water-taxi service between Mulwala and Yarrawonga, such as from the town centre to accommodation operators such as the Sebel, would provide a unique experience and appeal to target markets.



 Image location: Echuca
Image credit: Emily Godfrey

THEME 4 ENABLING INFRASTRUCTURE



Deliver of wharves and mooring infrastructure

 Region-wide

 Councils

Mooring infrastructure, in the form of wharves and temporary mooring points, is required at various locations across the region to support an increase in commercial cruising.

This will improve access to the waterfront for commercial vessels and passengers, and remove one of the current major barriers to cruising.

Key mooring infrastructure requirements have been identified by sub-region below.

Western Murray

- › Locations along the Murray River to support access to Perry Sandhills and other nature based assets.
- › Expansion of Mildura Wharf to allow for additional commercial operations.

Mid-Western Murray

- › Temporary mooring at various locations throughout Gunbower National Park to provide access for other activities such as hiking and wildlife watching.
- › Development of a public wharf at Swan Hill with mooring points.

Central Murray

- › Consider potential relocation of some permanent moorings along Echuca riverfront to new marina to allow for increased moorings.

Mid-Eastern Murray

- › Development of a new Tocumwal Foreshore wharf to support Canoeing /kayaking and expansion of commercial operations.
- › Temporary mooring infrastructure at Tocumwal and Cobram, including up to 5 permanent moorings to support private operators.
- › Increased mooring infrastructure in Corowa at Corowa Mooring.
- › Public Moorings (up to 10) at Apex Park, Mulwala Foreshore.
- › Mooring infrastructure at wineries.

Central Murray

- › Wharf And Mooring Points At Gateway Island
- › Wharf at Lake Hume Village

Next Steps

----->>>
Councils to identify specific locations for wharves, pontoons and temporary mooring points to service the existing market.

Council to deliver infrastructure at identified locations within their remit, and liaise with State Government agencies needed to deliver other mooring infrastructure.



 Image location: Swan Hill Rotary Park
Image credit: Visit Swan Hill, Ewen Bell



Waterfront activation precincts

 Region-wide

 Councils

There is a need for investment in a range of infrastructure, amenities and facilities at key waterfront locations to support cruising.

Some waterfront locations have received significant Government investment and as such are well developed, such as Mildura Riverfront, Gannawarra waterfront locations such as Koondrook and Cohuna, and the Port of Echuca precinct. However there is still a major need for investment across the region to support the activation of riverfront precincts and to ensure they support commercial waterway activity.

Key investments required include:

- › Swan Hill Riverfront Investment. Develop an enclosed swimming pool on the Little Murray River and provide commercial activation through investment in shipping containers to support food and beverage operations.
- › Investment at Onion Patch to create another hub for water-based access in Echuca Moama, including:
 - › Moorings (allow for up to 10 new vessels)
 - › Riverfront beach
 - › Formalisation of car parking and access including paths
 - › Landscaping

- Investment at Barmah National Park Launch Site
 - › Increase permanent moorings to allow for an additional 5 boats
 - › Floating pontoon site to support paddle sports
 - › Formalisation of car parking, access and paths
 - › Landscaping
- Albury Riverfront Precinct
 - › A boardwalk along the river
 - › Jetty access and a mooring point
 - › Formalisation of access to the river in specific areas
 - › BBQs and picnic facilities
 - › Built shade structures
 - › Better car parking
 - › Improved links with the Wagirra Trail, CBD and Hovell Tree Park.

Next Steps

----->>
Councils to engage consultants to undertake precinct masterplans for identified locations, which will identify sites for water infrastructure (taking into consideration year-round access to water), access and parking, landscaping treatments, and potential commercial activation.

Council to develop a capital works program and seek funding to support delivery. MRT to play a supporting role in advocacy and seeking access to funding.

Investment in standardised water access points

 Region-wide, locations TBD

 Councils

Investment in standardised canoe and kayak access points along the length of the Murray. This would support the establishment of multi-day paddling experiences.

Next Steps

----->>
Council to identify locations for standardised canoe and kayak access in conjunction with private operators, in order to ensure the locations meet their needs and provide access to the river during all conditions.



Weir at Swan Hill

 Region-wide

 Councils and MDBA/GMW

Cruising around Swan Hill is highly restricted by the variable water levels, due to a lack of weirs surrounding Swan Hill. The closest weir is Torrumbarry Weir. As a result, the Murray River at Swan Hill is extremely shallow which often prevents cruising.


State Government investment in a weir is required if cruising is to be supported in the Western Murray sub-region in and around Swan Hill.

Next Steps



Undertake a feasibility study for investment in a weir at Swan Hill to allow for cruising to occur.



 Image location: Mildura
Image credit: Roberto Seba

THEME 5 SUPPORTING CRUISING INFRASTRUCTURE



Cruising The Murray Digital Activation Program

 Murray Regional Tourism

Contemporary visitors have the greatest desire to book experiences online, with research by TripAdvisor indicating that 80% of people book their travel completely online .

It is critical that cruising operators lift the quality of their digital presence to provide high quality digital visitor information, and \ to include booking capabilities. Murray Regional Tourism has a role to play in educating cruising businesses on the importance of having a contemporary online website and booking platforms.

In addition, there is a need to showcase all operators and available experiences through a singular ‘Cruising the Murray’ information page online, for visitors to understand the breadth of experiences available. There is opportunity to establish a Cruising the Murray sub-page of the Visit The Murray website, with integrated booking capability. This will provide a singular platform for consumers to browse and book cruising experiences.

Next Steps

----->>
Workshops with cruising operators to educate and elevate digital presence.

Murray Regional Tourism to develop Cruising the Murray sub-page of the Visit The Murray website with integrated booking capability.

Establish Cruising the Murray Industry Website

 Murray Regional Tourism

There is a need to improve the quality of existing tours in order to meet consumer demand, which in large includes the expand of existing offers to have more add-on experiences such as visits to farms and restaurants, natural attractions or other activities.


Murray Regional Tourism should identify and promote the add-on experiences that can be utilised by operators in their cruising offering, and provide an online inventory and contact details for these operators. This may include tours of on-land and nature-based destinations, accessed by boat, such as:

- ▶ Indigenous Experiences, such as providing Indigenous interpretations of Murray River at key locations, that can be undertaken in conjunction with a cruising experience. For example, there would be opportunity to include Indigenous storytelling on the PS Pyap, Swan Hill.
- ▶ Nature-based Experiences, such as wildlife or wetland tours, that can be undertaken in conjunction with a cruising experience. This may include tours of on-land nature-based destinations, accessed by boat.
- ▶ Food and Wine Experienced, include on-board dining or travel to restaurants or wineries by boat.

Next Steps

----->>
Murray Regional Tourism to present market research to cruising operators to demonstrate opportunities, and obtain industry support for an industry website.



 Image location: Mildura
Image credit: Roberto Seba



Networking and advocacy group

 Murray Regional Tourism

The cruising industry is currently quite fragmented and there is little collaboration across the sector to share knowledge, network, undertaken advocacy efforts, or gain efficiencies.

Establish a cruising networking and advocacy group to foster a stronger voice for cruising issues, such as infrastructure needs, and policy changes.

Next Steps

----->>

Murray Regional Tourism to identify key operators to establish a cruising networking and advocacy group.

Embed cruising into marketing

 Murray Regional Tourism

Embed cruising into Murray Regional Tourism’s existing marketing operations to promote new and existing experiences, as well as support visitor attraction and engagement in cruising. This may include a landing page that highlights the Cruising the Murray offer and provides a call to booking.

Next Steps

----->>

MRT to provide leadership in delivering coordinated marketing activities specifically for the cruising sector.

Deliver a program of ‘Cruising the Murray’ marketing activities to promote this as a hero experience for the Region.

Guide to investment in Cruising

 Murray Regional Tourism

Investing in a new cruising business, or expansion of an existing business, requires substantial time involvement and in-depth understanding of the regulations, authority roles and required permits, insurances etc.

Murray Regional Tourism should create a ‘how to’ guide for navigating governance for cruising operations and presenting opportunities to potential investors. In particular, this should detail ‘how-to’ set up a cruising business, including the approvals process, overview of permits required and relevant authorities, and should tackle cross-border process challenges.

Next Steps

----->>

MRT to develop a region-wide cruising investment guide, with input from existing operators who have successfully navigated the approvals process. This should be developed for each type of cruising / vessel (e.g. different process for houseboat, private boat cruise and canoeing) .

Cruising governance review and model

 Murray Regional Tourism

Establishment of a new cruise business, as well as operation of and investment in existing businesses, can be hindered by the complex governance system that requires navigation. The array of government agencies and stakeholders involved in the process, from vessel regulations to mooring licences and operating permit approvals, can be a major deterrent for cruising operators. This process is displayed in Appendix E, highlighting the process in a linear manner, although in reality the process is rarely this straightforward.

In order to enable cruising as the hero experience of the Murray Region, an enhanced Cruising Approvals system is required to ensure investors are able to easily navigate the system and to reduce the number of authorities an investor needs to directly liaise with. This may occur through changes in authority roles to reduce the number of authorities required in the process, establishment of a new branch of an existing authority, or establishment of an independent organisation to manage the approval process.

Next Steps

----->>

Identify and evaluate the potential governance model solutions against pre-defined assessment criteria to meet operator needs.

MRT to undertake discussions with the cross border commissioner to discuss permit approval streamlining.

Undertake workshops with both Councils, Government agencies and industry to test and refine the identified improved model.



Policy to support houseboat operation at locations, such as Lake Hume and Lake Mulwala

 Murray Regional Tourism

There is a need for policy changes to allow for increased houseboats on Lake Mulwala and the introduction of houseboats on Lake Hume.

A feasibility study and advocacy document should be prepared, that takes into consideration sewage management, safety and mooring points in deep water locations for times when water levels are low. This should provide a strong business case for policy changes.

Next Steps



Murray Regional Tourism to work with private operators to identify potential regulatory changes that would support expanded business operations, and engage a specialist consultant to undertake a feasibility study and advocacy document.

Murray Regional Tourism to undertake discussions with State and Federal authorities to advocate for required regulatory changes.

Cruising Workforce Development Strategy and Implementation

 Murray Regional Tourism

Staff and skills shortages are a critical issue for the Murray region, which impact the operation of paddlesteamers and other boats.

There is a shortage of appropriately qualified steam wrights, boat builders and boat maintenance staff required to service the paddlesteamer industry as well as the broader cruising sector. In addition, there is a shortage in suitably skilled tour operators to lead cruises and guided tours, as well as supporting staff.

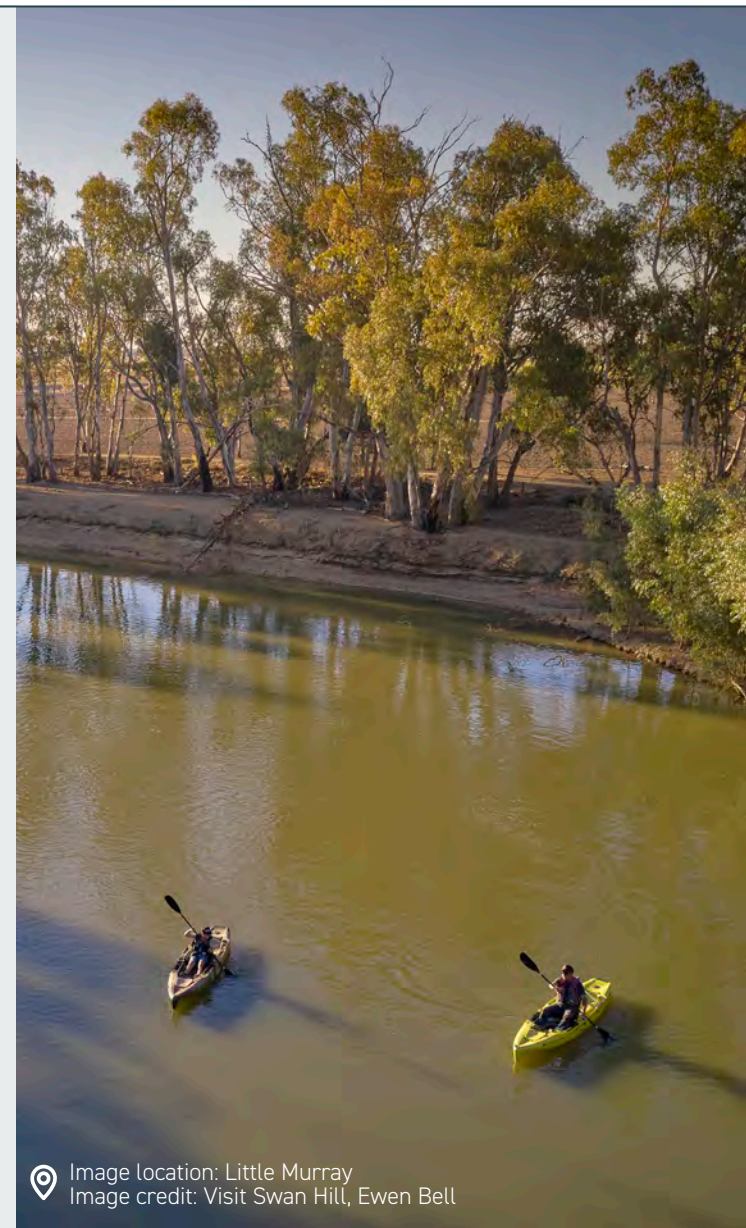
In collaboration with TAFEs and RTOs, Murray Regional Tourism will establish the Murray Region as the leading destination for boating, cruising and water-based guiding operator training in Australia.


Next Steps



Murray Regional Tourism to work with private operators to identify skills and training gaps and needs.

Murray Regional Tourism to work with TAFEs and RTOs to identify potential course offerings and needs.



 Image location: Little Murray
Image credit: Visit Swan Hill, Ewen Bell

Investment Impact on Visitation

Below is an outline of the ongoing annual economic benefits from delivering a substantially expanded cruising industry in the Murray, in line with the opportunities identified in the Murray Cruising Strategy. Investment in day and overnight cruising product would deliver substantial economic benefits to the Murray Region.

A fully expanded Murray day cruise offering in line with the opportunities identified in the Murray Region Cruising Strategy is estimated to draw over 700,000 additional visitors to the Murray region per annum, with a total spend of over \$49 million. Increased expenditure by these visitors will deliver an additional \$71 million in output and generate 544 jobs for the Murray region.

A fully expanded overnight cruising industry in the Murray is expected to attract an additional 368,052 overnight visitors to the region, delivering \$148 million in spend to the economy. This is expected to generate economic flow on benefits, including \$212 million in output and 1,624 jobs.



VISITATION BENEFIT

+1.8M

Visitors

+\$259M

Spend



ONGOING BENEFIT (PER ANNUM)

+\$284M

Total Output

+2,167

Jobs



ONGOING VISITATION BENEFIT⁴³

	VISITORS			OUTPUT			JOBS		
	No.	Direct	Indirect	Total	Direct	Indirect	Total		
DAY CRUISE	716k	\$49M	\$71M	\$121M	355	189	544		
OVERNIGHT	368k	\$148M	\$212M	\$360M	1,061	563	1,624		
TOTAL	1.08M	\$197M	\$248M	\$481M	1,416	751	2,167		

⁴³ Source: Urban Enterprise, 2022, calculated using REMPLAN, Urban Enterprise Murray region market research and Tourism Research Australia (TRA) National Visitor Survey (NVS) 3-year average (2017-2019)

Appendices

APPENDIX A DOCUMENTS REVIEWED

Cruising Context

- › MDBA Corporate Plan, 2020-21
- › MDBA Basin Plan Annual Report, 2018-19
- › New Water Infrastructure in the Murray Darling Basin, 2021
- › Victorian Recreational Better Boating Strategy, 2021
- › Victorian Boating Behaviour Report, 2015
- › DELWP Annual Report, 2021
- › GMW Corporate Plan, 2021-22 – 2025-26
- › GMW Resource Plan, 2019
- › South Australian River Murray Water Resource Plan, 2019
- › Victorian Murray Water Resource Plan, 2019
- › Transport NSW Murray- Riverina Region Boating Plan, 2015
- › NSW Regional Water Statement, 2019
- › NSW Roads and Maritime Services Annual Report, 2017-19
- › NSW Roads and Maritime Services Corporate Plan, 2018-21
- › Roles of Water Management Agencies in NSW, 2018
- › Water for Victoria Water Plan, 2016
- › Victorian Water Industry Act, 1994

Murray Regional Tourism

- › Murray regional Tourism Annual Report, 2019-20
- › Murray regional Tourism Strategic Plan, 2021-24
- › Murray region Destination Management Plan, 2018-2022

New South Wales

- › NSW Visitor Economy Strategy, 2030
- › NSW Aboriginal Tourism Action Plan, 2017-2020
- › NSW Food & Wine Tourism Strategy & Action Plan, 2018-2022
- › NSW Regional Conference Strategy & Action Plan, 2017-2021
- › NSW Statewide Destination Management Plan, 2019
- › NSW Cruise Development Plan, 2018

Victoria

- › Coronavirus (COVID-19) impact on Victoria's Visitor Economy, TEVE, 2021
- › Victoria's 2020 Tourism Strategy, 2013
- › Victoria's China Tourism Strategy, 2012
- › Victoria's Regional Tourism Strategy, 2013-2016
- › Victoria's Trails Strategy, 2014-24
- › Victoria's Golf Tourism Strategy, 2018-23
- › Central Victorian Green House Alliance

Western Murray

- › Light State Expression of Interest, 2021
- › Mildura Regional Development Strategic Plan, 2021-2024
- › Mildura Rural City Council Event Strategy, 2025
- › Mildura Riverfront Stage 2 Final Masterplan, 2019
- › Mildura Rural City Council Visitor Servicing Strategy, 2025
- › Powerhouse Place Digital Activation Project, 2021
- › Sustainable Wentworth Strategy, 2016
- › Dareton Revitalised Strategy, 2021
- › Buronga Gol Gol Structure Plan Report, 2020
- › Willow Bend Caravan Park Proposed Future Layout

Mid-Western Murray

- › Swan Hill Destination Marketing Strategy, 2021
- › Swan Hill Community Vision and Council Plan, 2021-2025
- › Swan Hill Rural City Council Investment Prospectus Snapshot, Swan Hill Rural City Council, 2020
- › Economic Development Insights Report, Swan Hill Rural City Council, 2021
- › Victorian Visitor Economy Master Plan Priority and Project Development: Pental
- › Island, Swan Hill – Lake Boga Path and Riverside Splash Park
- › Gannawarra Shire Council Strategic Tourism Plan, 2021-2026
- › Gannawarra Shire Council Economic Development Strategy, 2019-2024
- › Gannawarra Shire Council Waterfront Masterplans, 2019

Central Murray

- › Meninya Street South Masterplan Report, 2019
- › Moama Bridge Arts Precinct and Meninya Street Masterplan, 2019
- › Moama Murray River Access Plan, 2012
- › Murray River Council Waterfront Strategy Request for Quotation, 2021
- › Murray River Council Priority Projects, 2021

Mid-Eastern Murray

- › Federation Council Priority Projects
- › Federation Council Economic Development Strategy, 2021-2025
- › Corowa Riverfront Master Plan Report, 2010
- › Delivery Program and Operational Plan Federation Council, 2021
- › North of the Murray 5 Year Destination Marketing Strategy and Implementation Plan, 2020-2024
- › Mulwala Foreshore Public Open Space Masterplan, 2015
- › RDA Murray Strategic Plan, 2019
- › Destination Riverina Murray NSW Destination Management Plan, 2018
- › Berrigan Shire Tourism Strategy, 2019-2023
- › Yarrawonga to Bundalong Foreshore Masterplan, 2008

Eastern Murray

- › Lake Hume Site Plan Recommendations and Architectural Concept, 2018
- › Albury Wodonga Visitor Economy Trends Report, 2020
- › Albury City Council Albury CBD Masterplan, 2009
- › Albury City Council Albury Riverside Precinct Concept Plan, 2021
- › Albury City Council Riverside Precinct Stage 2 Refined Concept Design, 2016
- › Albury Wodonga Destination Management Plan, 2019-2023
- › Albury City Council Economic Indicators, 2021
- › Albury City Council Local Strategic Planning Statement, 2020
- › Murray River Experience, Albury City Council, 2007
- › Two Cities One Community Strategic Plan, 2017-21
- › Gateway Island Masterplan Report, 2018
- › City of Wodonga Cultural Services Plan, 2021-2026
- › Goulburn Murray Water Lake Hume Land and On-Water Management Plan, 2015
- › Greater Hume Council Local Strategic Planning Statement, 2018
- › Greater Hume Council End of Term Report, 2021
- › Greater Hume Shire Community Strategic Plan, 2017-2030
- › Greater Hume Visitor Information Centre Business Plan, 2018-2022
- › Greater Hume Shire Visitor Experience Plan, 2015-2018

APPENDIX B CONSULTATION SCHEDULE

Cruising Operators

- › Kingfisher Cruises
- › All Seasons Houseboats
- › Murray River Adventures
- › Murray River Canoe Hire
- › PS Pyap
- › Wetlander Cruises
- › Mildura Houseboats
- › Luxury on the Murray
- › Emu Outdoors SUP /Mildura SUP

Government Agencies

- › Goulburn Murray Water
- › Department of Regional NSW
- › Visit Victoria
- › NSW and VIC Cross-Border Commissioners
- › NSW National Parks and Wildlife Service
- › NSW Forestry
- › Victorian State Government Department of Jobs, Precincts and Regions
- › Victorian State Government Department of Environments, Land, Water and Planning
- › Parks Victoria
- › Murray Darling Basin Authority
- › Transport for NSW Maritime
- › Murray Darling Association
- › Boating Industry Association Victoria

Local Government

- › Mildura Rural City Council
- › Wentworth Shire Council
- › Swan Hill Rural City Council
- › Gannawarra Shire Council
- › Campaspe Shire Council
- › Murray River Council
- › Edward River Council
- › Moira Shire Council
- › Berrigan Shire Council
- › Federation Council
- › Albury City Council
- › City of Wodonga Council
- › Greater Hume Shire Council

APPENDIX C GOVERNANCE OF WATER BODIES

A range of stakeholders are involved in the management of the Murray Region's waterways. The primary role of the region's key lakes (Lake Hume, Lake Mulwala, Lake Boga) is to capture, store and release water for the benefit of system users. Managing water quality and major infrastructure assets at these key storages therefore involves a highly complex and coordinated management approach.

Governance responsibilities for waterways in the Murray region is largely segregated by state. Due to being located on the NSW-VIC border, management responsibilities for the Murray River, Lake Hume and Lake Mulwala are shared between states. A summary of the governing bodies and stakeholders for each of the key lakes and rivers in the Murray Region is provided below.

Governance Structure, Key Murray Region Lakes

	Lake Hume	Lake Mulwala	Lake Boga
Manager	MDBA	MDBA	MDBA
Water storage and releases	Water NSW	GMW	GMW
Infrastructure	MDBA – Manager Hume Dam Water NSW – Constructing authority for Hume Dam LGAs – Foreshore infrastructure, local boat ramps, moorings and wharves	MDBA – Setting weir release rates GMW – Manages and maintains weir LGAs – Foreshore infrastructure, local boat ramps, moorings and wharves	LGAs – foreshore infrastructure, local boat ramps, moorings and wharves
Foreshore land	GMW	GMW – Public foreshore land and licensing and approving foreshore structures Parks Victoria – Crown Land and other public land near the junction of the Ovens and Murray Rivers LGAs	GMW – Public foreshore land, licensing and approving foreshore structures VIC Public Land Services – Manages the crown land fronting Lake Boga LGAs
Project/program delivery	GMW LGAs Transport NSW – Maritime (provide concurrence on projects)	GMW LGAs Transport NSW – Maritime (provide concurrence on projects)	GMW LGAs

	Lake Hume	Lake Mulwala	Lake Boga
Boating Authority	Maritime Safety Victoria – South of Bethanga Bridge Transport for NSW- Maritime – North of Bethanga Bridge	Transport for NSW- Maritime	Maritime Safety Victoria
Fishing Authority	VFA – Fishery management and recreational fishing compliance	NSW DPI Fisheries – Recreational fishing compliance VFA – Fish Habitat Management	VFA – Recreational fishing compliance, fish habitat management
Waterway and floodplain management	North East Catchment Management Authority (VIC)	North East Catchment Management Authority (VIC)	North East Catchment Management Authority (VIC)
Water quality, soil health, flora and fauna	Murray Catchment Management Authority (NSW)	Murray Catchment Management Authority (NSW)	GMW
Other	NSW DPI – Reviews developments and proposals that may impact aquatic life NSW Department of Planning, Industry and Environment Water – Blue green algal monitoring and response, diversion licensing	NSW DPI – Reviews developments and proposals that may impact aquatic life GMW – Blue green algal monitoring NSW Department of Planning and Environment – Diversion licensing, water quality monitoring (not blue green algae)	GMW – Blue green algal monitoring

Governance Structure, Key Murray Region Rivers

	Murray River	Campaspe River (VIC)	Darling River (NSW)	Edward River (NSW)
Manager	MDBA	MDBA	MDBA	MDBA
Infrastructure Manager	Water NSW <ul style="list-style-type: none"> › Houston Weir › Pericoota Weir › Wentworth Weir GMW: <ul style="list-style-type: none"> › Hume Weir › Yarrawonga Weir › Torrumbarry Weir › Mildura Weir › Gunbower Weir › Kerang Weir 	GMW	Water NSW	Water NSW
Project/program delivery	<ul style="list-style-type: none"> › Transport for NSW Maritime › Water NSW › GMW › Water Infrastructure NSW (NSW Department of Planning, Industry and Environment – Water) 	GMW DELWP	<ul style="list-style-type: none"> › Transport for NSW Maritime › Water NSW › Water Infrastructure NSW (NSW Department of Planning, Industry and Environment – Water) 	<ul style="list-style-type: none"> › Transport for NSW Maritime › Water NSW › Water Infrastructure NSW (NSW Department of Planning, Industry and Environment – Water)
Boating Authority	Transport for NSW	Maritime Safety Victoria	Transport for NSW	Transport for NSW
Fishing Authority	NSW DPI Fisheries	VFA	NSW DPI Fisheries	NSW DPI Fisheries

APPENDIX D PROCESS FOR ESTABLISHING A CRUISING OPERATION

This section provides an overview of the process that needs to be undertaken to establish a new cruising operation in the Murray Region, from construction of the vessel, through to operation of the commercial cruising experience.

Commercial Cruising Operation Establishment Process

Stage	Agencies	Considerations
1 Vessel Construction	AMSA	<p>The National Standard for Commercial Vessels (NSCV) Section C provides the standards for design and construction of domestic commercial vessels, including:</p> <ul style="list-style-type: none"> › Arrangement, accommodation and personal safety; › Watertight and weathertight integrity; › Construction; › Fire safety; › Engineering; › Stability; and › Equipment. <p>Locks along the Murray River are all either 17m W x 51m L or 17m W x 83m L. The vessel must be smaller than the associated lock if it is to travel past a weir.</p>
2 Vessel Regulation	AMSA Transport for NSW Maritime	<p>All new domestic commercial vessels need to be surveyed by an accredited marine surveyor or an AMSA recognised organisation. New vessels must meet the standards for construction, subdivision, stability, fire safety, machinery, and associated systems and equipment set out in the National Standard for Commercial Vessels and select sections of the Uniform Shipping Laws Code that apply to the Murray River.</p> <p>Transport NSW Maritime regulates sewage, greywater and other discharge. Under the Protection of the Environment Operations Act 1997, it is an offence to pollute any NSW Waters. There are no specific requirements for recreational vessels, however it is recommended that sewage is stored using an onboard toilet with a holding tank, a small portable toilet with a holding tank or onshore toilets. Raw sewage from a holding tank must be discharged at a pump out facility or toilet.</p>

3 Registration and permits	AMSA	<p>All domestic commercial vessels are regulated under the Maritime Safety National Law Act 2012. Vessels must meet the National Standard for Commercial Vessels (NSCV), which detail standards for vessel survey, construction, equipment, design, operation and crew competencies.</p> <p>The following requirements must be in place to operate a commercial vessel.</p> <ul style="list-style-type: none"> › A unique vessel identifier; › A certificate of survey; › A certificate of operation; › A safety management system which demonstrates and documents how the vessel meets AMSA's mandatory general safety duties; › A certificate of competency for each crew member – which involves completing a course through an RTO and sitting an exam through the RTO or AMSA.
4 Moorings, Marinas and Wharves	Transport for NSW – Maritime LGAs	<p>Marine businesses require a commercial mooring license from Transport NSW Maritime, in order to moor on NSW waterways. The license is valid for 12 months. Any costs associated with buying, installing and servicing mooring apparatus are the responsibility of the commercial operator. The mooring apparatus must be serviced at least every 12 months, with a proof of mooring service shown to Transport for NSW Maritime on request. A commercial mooring is subject to Commercial Mooring Licence Standard Conditions.</p> <p>LGAs own and manage local boat ramps, moorings and wharves. Therefore, the operation of a commercial cruise business would involve liaising with Council, either to utilise existing structures or to propose investment in new infrastructure.</p> <p>The NSW Maritime Infrastructure Plan outlines that support for maritime infrastructure and amenity improvements for recreational and commercial boating in the Murray River, that is owned by Council and other delivery partners, will be funded through the Boating Now Program. This includes boat ramps, jetties, marinas and wharves.</p>
5 Operational Licenses	AMSA NSW National Parks Parks Victoria	<p>Domestic commercial vessels must hold an AMSA certificate of operation.</p> <p>Any business undertaking a commercial activity associated with recreation or tourism in a NSW national park or reserve must hold a Parks Eco Pass License.</p> <p>A tour operator and activity provider license is required for any person or business conducting an organised tour or recreational activity on public land in Victoria.</p>
6 Foreshore Structures	NSW DPIE DELWP GMW	<p>A domestic waterfront licence must be obtained from the NSW Department of Planning, Industry and Environment prior to constructing any new structures on NSW foreshore crown land. The proposal must comply with the Domestic Waterfront Licenses Guidelines.</p> <p>In Victoria, DELWP is responsible for issuing licenses for crown land water frontage. However, grazing is the main use for which Crown land water frontages are licensed. Written approval from DELWP must be obtained prior to construction of any improvements on a crown water frontage.</p> <p>For foreshore land owned or managed by GMW, landowners may apply for an occupation licence and approval to construct or keep privately owned structures.</p>
7 Operation	Transport for NSW – Maritime MDBA	<p>Transport for NSW Maritime is the boating safety regulator for the Murray River.</p> <p>MDBA provides up to date information regarding water levels, salinity and temperature.</p>

This report was prepared by Urban Enterprise for Murray Regional Tourism in September 2022.

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