**Submission Number: 553**
**Date Received: 31/01/11**

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# Murraylands Tourism Partnership

# Submission

## to

## The Murray Darling Basin Authority

## January 2011

***'Guide to the proposed Murray Darling Basin Plan'***

# October 2010

## Table of Contents


2. Table of Contents

3. Executive Summary

4. Murraylands Tourism Partnership (MTP)

    - Roles of the Murrayands Tourism Partnership

5. Murraylands Integrated Strategic Tourism Plan (MIRST Plan)

6. Submission

    a) Status of tourism within the Murray Darling Basin Plan
    b) Economic value of tourism within the Murray Darling Basin region
    c) Negative Impact of the Drought and Water Over-extraction on the Tourism Sector
    d) Potential of tourism for investment and employment growth
    e) Impact of scenarios outlined in the MDBP Guide

7. Recommendations – healthy river system; sustained river levels; innovative product development; employment & investment growth

8. Conclusion

## 2. Executive Summary

This submission is presented by the Murraylands Tourism Partnership (MTP) to the Murray-Darling Basin Authority in response to the release of the *Guide to the proposed Murray Darling Basin Plan* in October 2010. The development of this submission also follows attendance at the community consultation meetings convened at Murray Bridge in rural South Australia in November 2010 by the Hon. Paul Caica, Minister for Environment and Conservation, the River Murray and Water for the South Australian Government

The Murraylands Tourism Partnership, under the auspices of Regional Development Australia, Murraylands & Riverland , Murraylands Tourism Marketing, Ngarrindjeri Ruwe Enterprises P/L and representatives of local government and tourism operators, submits this response in accordance with designated responsibilities to implement the Murraylands Integrated Strategic Regional Tourism Plan (MIRSTP 2009).

The Murraylands Tourism Partnership submission presents the case for River Murray related tourism across the Murraylands and addresses key issues which will impact upon the tourism sector within the region as a result of recommendations within the *Guide to the proposed Murray Darling Basin Plan.*

Recommendations presented by the Murraylands Tourism Partnership recognise the importance of tourism within the regional economy and high light the potential for innovative investment, product development and employment which the tourism industry can provide in the forthcoming period of water distribution changes and ongoing economic structural adjustment.

## 3. Murraylands Tourism Partnership

Murraylands Tourism Partnership (MTP) was formed in September 2009 to implement the Murraylands Integrated Regional Strategic Tourism Plan (MIRST 2009). The MIRST Plan was commissioned in response to strong regional interests in the potential of the tourism industry identified through the Regional Investment Opportunity Project implemented across five regional councils within the Murraylands in 2007. The MIRST Plan provides a platform for sustainable growth for tourism in the region including increase in visitor numbers, increase in average visitor spend and increase in profitability of tourism related businesses in the region.

Management of the Murraylands Tourism Partnership is undertaken by the Independent Chair supported by an Executive Officer. Members of the MTP include representatives from Regional Development Australia, Murraylands and Riverland, Murraylands Tourism Marketing, Ngarrindjeri Ruwe Enterprises P/L., Coorong District and Mid Murray Councils, Houseboat Hirers Association and Monarto Zoological Park representing the regional tourism operators. This submission has been prepared in accordance with the roles and responsibilities outlined in the Murraylands Tourism Partnership Terms of Reference as listed below:-

- **The Roles of the Murraylands Tourism Partnership** include:-
- Implementation of the MIRST Plan engaging strategic stakeholders in the process
- Identification of external resources required to implement appropriate strategies
- identification and preparation of requests for internal and external funding and resource opportunities to assist in implementation of strategies
- ensuring the strategies, outcomes and objectives identified in the plan align with the needs of the regional stakeholders
- providing input on behalf of the stakeholders, organisations and the constituency they represent
- communicating the activities and direction of the MTP activities to stakeholders within their organisation and constituency
- adopting a ‘regional focus’ in implementation of the Plan
- identifying regional, state, national and global risks which may have a negative impact on the region in the context of the Plan’s objectives
- addressing any issues that have major implications for the tourism plan and its implementation
- reconcile differences in opinion and approach in the spirit of a true partnership.

## 4. Murraylands Integrated Regional Strategic Tourism Plan (MIRST2009)

The MIRST Plan was developed as a partnered initiative of the Murraylands Regional Development Board, South Australian Tourism Commission, the Rural City of Murray Bridge, Mid Murray Council, the Coorong District Council, the District Council of Karoonda East Murray, the Southern Mallee District Council, Murraylands Tourism Marketing, the Murraylands Indigenous Consortium, the Houseboat Hirers Association and the Murraylands Regional Tourist Association. It was released in September 2009.

The MIRST Plan represents and demonstrates a multi partnered stakeholder approach to increasing the rate of growth beyond existing predictions and developing strategies and actions by which to achieve these growth targets. The plans have been developed in consultation with representatives of the State, regional and local tourism sectors to engage local knowledge and experience, along with stakeholders who provide an external perspective in market demand and product opportunity.

The primary objective of the Murraylands Integrated Regional Strategic Tourism Plan (MIRST) is to:

- *'Provide the Murraylands with an innovative and strategic policy and planning, and critical framework that will help attract and grow investment and build capacity in sustainable tourism within the region.'*

The MIRST Plan envisaged that the Murraylands *would be '…recognised as an appealing, and accessible, holiday destination of fun and relaxation'.* The Plan determined that by 2020 Murraylands tourism would have high appeal to consumers; would be a sustainable, operator and community led industry; would have doubled its contribution to the regional economy; would showcase regional history, heritage and culture; would be supported by the highest quality river, and off river, accommodation choices that integrate with a range of authentic and energising experiences; would be an industry which actively collaborates to deliver new products and services that generate increased profits for operators.' Ref. MIRST Plan 2009

## 5. Submission

In this context the Murraylands Tourism Partnership presents this submission addressing four specific issues:-

a) Status of tourism within the Murray Darling Basin Plan
b) Economic value of tourism within the Murray Darling Basin region
c) Potential of tourism for investment and employment growth

d) Impact of three Scenarios outlined in the MDBP Guide

## a) Status of tourism within the Murray Darling Basin Plan

The *Guide to the Murray Darling Basin Plan* released in October 2010 recognised the economic role of tourism across the region but argued that it is a difficult industry to quantify. The Guide presented the case that… *'Tourism has few direct water consumption needs. However, its ongoing viability is closely related to the ecological health of the rivers, lakes and other Basin environmental assets including world heritage sites and Ramsar wetlands. These represent significant tourist destinations for visitors and Basin residents. It is difficult to accurately determine the economic size and employment base of the tourism sector. There are a range of tourism-related services based industries across the Basin that employ a large part of the Basin workforce. Including:- cultural and recreational services; wholesale and retail trade; accommodation and cafes and restaurants. In total this accounted for approximately 221,000 employees in 2006.' (*ref. pps. 23-24*)*

The Guide anticipated that there was potential for tourism expansion and that increase in water levels could have an advantageous impact upon this industry. Analysis of potential Scenarios resulting from three SDL's indicated that Scenario 1 might require some negative trade-offs if the environmental flows were reduced while the higher levels allocated through Scenarios 2 & 3 would have greater environmental benefits with flow-on effects for tourism.

### b) Economic value of tourism within the Murraylands/Riverland region

The MTP argues that the value of the tourism sector has already been accurately quantified. Furthermore it can be effectively measured through the adverse impacts of reduced water levels experienced within the Murraylands regional economy and particularly in the region below Blanchetown/Lock 1 and the Coorong and Lower Lakes over the recent period of drought.

It appears that the MDB Plan has not given sufficient importance to the size and range of the tourism sector neither has it considered the dependence of the tourism industry on water quality and availability. Furthermore, the Guide has not considered the negative impact of ongoing critical observations and perceptions of the status of the river based environments upon visitation levels across the region.

### i. Quantification – tourism economy

The most recent economic analysis commissioned by the Federal Government's Australian

Institute of Marine Science through the international accounting company Deloitte estimated the total value of the Marine Industry (including activities on inland waters) in Australia and established that:-

> *'total measurable value of economic activity of the national marine industry', based on operations for the 2006/07 financial year was $38Billion. Of this, $11.6Billion was attributed to 'the domestic consumption of tourism goods and services'*

The South Australian recreational boating industry's contribution to '*total measurable value of economic activity of the national marine industry'*, for 2006/07 was estimated at $4.2Billion and of this $1.3Billion was attributed in South Australia, to *'the domestic consumption of tourism goods and services'.*

The Boating Industry of South Australia has reported that this '*SA tourism figure of around $1.3Billion, delivered to the South Australian economy'*, is largely provided by the South Australian boat industry and the visitors who seek a 'water-view and/or to engage in on-water activities' *on their '*free days'/'taking their weekend' and/or for *'annual holiday/s trips'*. In the Murraylands & Riverland the Murray River represents the heart of the tourism industry.

Research, largely funded by the Federal DOTARS organisation undertaken by the Boating Industry Association of South Australia Inc. confirmed that up to 50% of the $1.3Billion 'tourism and leisure' benefit is delivered to communities along the River, Lakes and Coorong 'below Blanchetown/Lock 1'.

Additional analysis was also undertaken by Econsearch Pty. Ltd. in 2008 to inform development of the MIRST Plan. Econsearch reported that total tourism expenditure in the Murraylands RDB region in 2006/07 was $122M. (based upon unpublished data provided by TRA and included net taxes (principally GST) and expenditure on imported goods and services from other regions in SA, interstate and overseas. Estimates of tourism expenditure are in basic prices, that is, net of net taxes (i.e. taxes minus subsidies) and marketing and transport margins.) Ref. Econsearch Pty. Ltd., Murraylands Integrated Regional Strategic Tourism Plan – Economic Modelling, 2008

*In aggregate it was estimated that expenditure by tourists in the Murraylands in 2006/07 generated the following level of regional economic and demographic activity:*

- *Approximately $78m in GRP which represents over 6 per cent of the regional total ($1.256m)*
- *Almost 1,120 full-time and part-time jobs which represent 7.0 per cent of the regional total (16,032)*
- *Approximately 960 fte.jobs which represent 6.3 per cent of the regional total (15,397 fte)*

- *Through market-driven activities (i.e. business activity generated by tourism expenditure) and related non-market activities (i.e. population driven services such as education) a total population impact of 2524 persons which represents 7.0 per cent of the 2006/07 regional total (i.e. 36, 253 persons)*

These assessments refer to a Murraylands industry which is essentially river based. With the exception of the Monarto Zoological Park and some facilities such as the agricultural, printing and rural heritage museum at the Mallee Tourist and Heritage Centre, Pinnaroo and the Old Tailem Town heritage facility and some inland motels and services the tourist sector is essentially Murray River dependent. The tourism industry primarily includes houseboats, holiday shacks, large passenger vessels and recreational activities such as ski-ing, fishing and canoeing supported by motels, hotels, caravan parks, holiday shacks and informal camping areas. These facilities service traditional family markets although the up market houseboat and passenger vessel sector is actively promoted by the South Australian Tourism Commission which defines the Murray River as one of the tourism icons of the State of South Australia with the result that:-

> '*The economic impact of these [water based] 'holidays' in South Australia is enormous: the essential sustenance for many Lower River/Lakes communities. Such communities are located 'on the water' or within a corridor of 80kms from both sides of the water'.*
> Ref. Boating Industry Association of South Australia 2010

The dependence upon the river and the vulnerability which results from this relationship has been revealed over the recent period of drought (and no doubt the current period of flooding). This interdependence must be given due consideration in the development of the Murray Darling Basin Plan.

## ii. Negative Impact of the Drought and Water Over-extraction on the Tourism Sector

While the negative effects of the recent drought have been significant these events have provided valuable information in support of regulated water levels for the Murraylands tourism industry. While the impact of water reductions upon irrigators has been at the forefront of the current debate, the potential plight of the tourism sector has received little attention. The independent tourism sector contributes significantly to the regional, state and national economies. It survives and expands through the ingenuity, resilience and determination of the operators. It does not receive subsidies or government assistance. It does suffer when water levels decline and when the perceptions of the public are influenced by media focus upon environmental catastrophies.

During the recent drought period tourism operators suffered serious reductions in income. Tourist visitor numbers to all facilities declined. Hiring of houseboats declined drastically. Numbers of holiday makers to traditional locations around the Lower Lakes were reduced. Water available to the recreational boating industry declined to such an extent that recreational boats were removed from the traditional moorings at Goolwa and the Lower Lakes. Numbers of holiday makers in hired holiday shacks, caravan parks and formal and informal camping sites declined. Attendances at recreational activities were also reduced. Business in traditional holiday destinations across the board declined in response to adverse publicity regarding water levels and climatic conditions along the Murray River. These negative economic effects flowed on to the service sector with reductions in supermarket, fuel and hotel sales and decline in business activities in commercial enterprises dependent upon or additional to the tourist industry.

The Manager of Riverglen Marina, Murray Bridge, Rose Faehrmann, who has successfully made the transition from the irrigation industry to tourism, reported that during the drought the Marina lost 50 per cent of moored boats and 60-70 per cent of commercial hires. The changes to water levels required significant repairs to infrastructure with $125,000 invested in dredging the entrance channel to maintain the water flow, replacement of electrical cables, additional poles to secure boats and trimming of trees and restoration of river banks to cope with wake wash. With the increase of water levels leading into 2011 commercial hires are gradually returning to previous levels although current floodwater publicity can cause some visitor anxieties. Ref. Rose Faehrmann, Riverglen Marina Murray Bridge, 2010

Conversely with the recent increases in the water levels along the Murray River and the Lower Lakes numbers of day visitor numbers and holiday bookings have increased significantly. Murray Bridge Visitor Information Centre reports an increase in visitor enquiries in November. While holiday bookings in caravan parks and holiday shacks and to holiday destinations around the Lower Lakes have increased along with the increasing quality and quantity of water in the system the current flooding along the Murray River at destinations such as Mannum and Murray Bridge is adversely affecting visitor numbers and holiday bookings through the summer holiday period of 2010-2011.

For tourism operators across the Murraylands and Riverland the public perception of water availability and quality in the Murray River has been and remains critical. Over the drought period the tourism industry was drastically affected by the ongoing negative press. Constant references to decline in water levels, the adverse environmental effects in the Coorong, loss of habitat and expanding acid-sulphate soils in the Lower Lakes caused tourist numbers to fall significantly. Although the water levels required by houseboats below Lock 1 were sufficient, inaccurate perceptions of low water levels deterred tourists from booking houseboat holidays.

The Boating Industry Association of South Australia has reported that the combined effects of drought conditions together with 'over extraction' practices have had wide-ranging, negative impacts on lives and livelihoods across much of Australia since 2000.

The impact was felt particularly by businesses of the leisure, tourism and recreational sectors and those that support them, the majority of which are located within about 'one hour's' drive of River Murray/Lakes waters and particularly those waters 'below' Lock 1 at Blanchetown through to Lakes Albert and Alexandrina the Murray Mouth and Coorong at Goolwa. These predominantly small, rural family concerns:-

> *... were devastated by the drought conditions (exacerbated by over extraction up-stream) and this continues through to the present day. Although the waters have (temporarily) returned, full recovery for the tourism and leisure industries and the communities which they support will take decades.* Ref. Boating Association of South Australia

Tourism industry representatives were particularly concerned that the Minister for Tourism, Martin Ferguson AM MP, had incorrectly stated that the River Murray had suffered only negligible effects from the drought at the official launch of the *Impact of Drought on Murray River Tourism Summary Report*, on 1 April 2010. The industry has been unable to find any justification for the Minister's figures.

Reinforcing the negative ongoing economic impact of changing water flows the Boating Industry of South Australia confirmed that in the stretch of River Murray Waters below Blanchetown through to the Murray Mouth the forward houseboat and charter bookings had never been worse.

- *the fleet is presently operating at around less than 50% of normal capacity. This has delivered a negative impact to rural communities of around $15Million annually,*
- *the use of the (privately) owned houseboat and cruising fleets is also way down, by at least, 50% and this has delivered a negative impact to the rural communities of around $25Million annually,*
- *holidays and leisure visitation has seriously declined on the Murray, in the Lakes and in the Coorong as people have anticipated 'no water at all or unsafe conditions due to navigation hazards and bank slumping and the like within the River and Lakes and Coorong' and*
- *with these conditions, and with perceptions of 'nowhere to go' boats have been relocated from inland waters of the Lakes and Lower Murray to 'more reliable' marinas upstream and to coastal moorings,*
- *more than 1000 large (non-trailerable, cruising craft) which offer overnight accommodation and/or galley services have gone from Lakes Albert and Alexandrina and*

- *the economic loss, to rural communities, incorporating aspects of boat servicing/fuelling/ provisioning is estimated to be in the order of $5Million annually,*
- *the economic loss delivered by the loss of revenues derived from rentals of moorings and berthing in marinas and at informal moorings is estimated to be in the order of $2Million annually,*
- *the number of 'boating' and other 'water based' day trippers and holiday makers is way down with a loss to the 'rural economy' of at least $200Million annually,*
- *despite the recent investment of millions of dollars on dredging, extending and rebuilding facilities most marinas, slips and ramps became unserviceable,*
- *although conditions have very recently improved, many of the larger commercial craft, for a period of nearly ten years, were unable to undergo biannual surveys a mandatory (safety) requirement of the State Department of Transport, Energy and Infrastructure,*
- *although many have been modified, the operation of 'cross River ferries' became untenable and road traffic was diverted to those communities where 'cross River bridges' exist, to the detriment of the 'have – no bridge' communities,*
- *so far as the tourism, recreation and leisure sectors (incorporating boat sales/boat repair, boat service/boat hire and charter operators) are concerned, things had never been worse.*

During the drought period the emphasis had rested upon the impact of water reductions on the up-river communities while little or no consideration had been given to those South Australians of over 70 communities (particularly to those 40 communities located below Lock 1 through to the 'new regulator' at Clayton) who essentially relied on recreational, leisure and tourism/holiday activities. These incalculable effects include the heartbreak of the owners, managers, and staff of such businesses, who had spent decades, in some cases generations, in developing the assets and reputations of their businesses.

Flow-on effects were also suffered by the very large number of people and businesses including the caterers, cleaners, providers of fuel and maintenance and the small family businesses including the pubs, deli's, newsagents, bakeries, and take-aways and purveyors of tackle and bait. The flow-on effects travelled across the communities to banks, real estate, schools and clubs and sporting facilities and churches across regional communities.

Research undertaken by the Boating Association of South Australia showed that In recent times many members of these communities had no option but to walk away, to join the ranks of the unemployed and the disheartened - the damage to lives and relationships was inestimable. While the upstream communities have protested volubly against potential reductions to water allocations the communities in the lower reaches of the Murray Darling Basin system have struggled to present the case for the restoration of a previously profitable industry comprised essentially of small, family owned, rural businesses.

## e) The potential of tourism for investment and employment growth

Research undertaken by the Regional Investment Opportunities Project in 2007 and in preliminary studies undertaken for the Murraylands Integrated Regional Strategic Tourism Plan indicated that there were unmet demands for quality accommodation, tourism trails, indigenous tourism expansion and creation of innovative tourism packages. There was clear potential to expand the high level end of the houseboat fleet, expand eco-tourism experiences and capitalise upon the unique qualities of the Murray River and its extended natural environment. The tourism industry had the potential to make stronger links between the Riverland and Murraylands building upon the environmental, heritage and recreational qualities of the Murray River. Ref. Strategic Directions, 2007

Imaginative, innovative and co-operative investment in new products, upgrading of existing products and infrastructure with marketing support provided by the South Australian Tourism Commission had the potential to expand visitor numbers and contribute to the achievement of the South Australian and Australian Governments economic targets. Strategic investment in tourism products could also provide new employment opportunities with the added bonus of retention of a youthful and creative population in regional areas. In the current context investment in tourism could provide opportunities for structural changes across the horticultural and irrigation dependent industries.

While the recent drought has had a negative impact upon the tourism sector it has highlighted the importance of the industry within the regional and state economy. The long term plan for the Murray Darling Basin can address and respond to the existing needs and potential growth of an important regional industry in a period of social and economic change.

## d) Impact of Scenarios 1, 2 & 3 as outlined in the MDB Guide upon the Tourism Industry.

In considering the interests of the broad range of tourism operators located across the Murraylands , the Murraylands Tourism Partnership has addressed the potential impact of each of the three Scenarios described in the *Guide to the proposed Basin Plan* released by the Murray Darling Basin Authority in October 2010.(pp.125-129)

**Scenario 1** which targets an additional 3000 GL/y, would be subject to variability and reductions to environmental flows and trade-offs during dry years. Scenario 1 would therefore leave the tourism industry including infrastructure, tourist operators and services in a precarious and unpredictable position.

Reduced and unpredictable water availability would bring the same negative results as those experienced in the period of drought:- loss of water quality and quantity; loss of water facilities;

loss of access to ferries and service facilities; increase of negative perceptions within the visitor community. These uncertainties would inhibit sustainable growth and product development and reduce economic opportunities at a time when structural changes are imminent.

In an industry which requires sustainable water levels the element of unpredictability could inhibit product investment and employment opportunities and cause fluctuations in an otherwise profitable seasonal industry.

**Scenario 2** which targets an additional 3,500 GL/y presents a more secure future and opportunities for investment and employment for the tourism sector. Once again the maintenance of consistent water levels and environmental assets will be required to support the tourism sector and provide reliable and predictable tourist destinations. Water levels have been a critical factor in maintaining access to the Murray River itself and to preservation of the infrastructure along the river edges. Lower water levels over the period of drought have damaged and limited access to ferries and boat ramps and have damaged bridge structures and river banks. Maintenance of water levels must be considered as a major factor in the retention and management of river infrastructure and servicing of houseboats. Ease of access to dry dock maintenance facilities and maneuverability of large passenger vessels in the lower reaches of the river is of critical concern.

**Scenario 3** with the target of 4,000 GL/y for the environment presents the best option for a vibrant and profitable tourism sector which depends upon a healthy river system. The Murray River, the Coorong and Lakes Alexandrina and Albert have been major tourism destinations for South Australian and interstate communities and have been promoted successfully in the international market by the South Australian Tourism Commission. Tourists from New Zealand have been particularly attracted to the quality houseboat experiences which are available along the slow moving Murray River by contrast to the fast moving waters of their land of the long white cloud. Maintenance of the natural environment will attract visitor numbers to an increasingly popular ecotourism sector.

## 7 Recommendations

The Murraylands Tourism Partnership recognises the primary importance of a healthy river system in maintaining a sustainable regional economy which supports healthy and profitable communities within the Murray Darling Basin system. The Murraylands Tourism Partnership recognises and supports the tourism sector as an essential component and participant within regional economies and communities. The Murraylands Tourism Partnership also recognises that the tourism sector ranges from multi-million dollar investments such as the internationally renowned passenger vessels, a commercial houseboat fleet which ranges from deluxe, high quality, family and small vessels to privately owned recreational boats. The MTP also recognises that a vibrant river based industry is supported by and contributes to the wider economy providing service opportunities and employment in accommodation and service industries such as fuel, catering, and mechanical and food supply. Based upon the recommendations of the MIRST Plan the MTP acknowledges and supports the expansion of the tourism industry and will continue to play an important role in attracting and developing new and innovative investments and employment opportunities across the Murraylands and adjoining Riverland.

On this basis the Murraylands Tourism Partnership recommends that the Murray Darling Basin Plan:-

- Recognises the economic importance of the existing and emerging tourism sector and the crucial part which it will continue to play in the economic and social lives of communities throughout the region

- Recognises the importance and potential of the tourism industry within the structural adjustments which will follow the changes to water allocations in the Murray Darling Basin system

- Recognises the potential for growth within the tourism industry and the benefits which can follow innovative investment

- Recognises the particular potential for ecotourism and indigenous tourism developments which are compatible with an environmentally sustainable Murray Darling Basin system

- Recognises the role of the existing and emerging tourism industry in the development of the Plan and the allocation of water across the Basin.

## 8 Conclusion

Traditionally the tourism sector brings billions of dollars into the river based regional economies in South Australia. The tourism industry across the Murraylands and neighboring Riverland has potential for growth and innovative expansion. New products are needed and the opportunities exist for investment in infrastructure and employment. Transition from high water level consumption by irrigators can be transferred to high water level usage by an expanding and innovative tourism industry. Eco and environmental tourism are emerging industries. International tourists are increasingly interested in real experiences and direct contact with the natural world. The restoration of the Murray Darling Basin system has great potential as a demonstration site and a unique tourist location where communities have recognised their interdependence with a healthy river system.

The Murrayland Tourism Partnership recognises that the tourism sector has a history of economic strength and value which has played an integral part in the South Australian and Australian economies for many decades. The Murray River based industry is one of the tourist icons in the South Australian Tourism Commission's portfolio of destinations for national and international travelers. The Murraylands Tourism Partnership is confident that their recommendations for investment in a healthy river system, sustained river levels, innovative product development and tourism based employment supported by the Murray Darling Basin Plan within a period of economic change and structural adjustment can ensure strong communities and economic and environmental sustainability in the future.

*'The Boating, Tourism and Leisure Sectors extract very, very little of our precious water resource but they rely on the availability of the resource, absolutely, for survival.'*

References

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