

Assessment of Equine Investment Opportunities

Nillumbik Shire Council



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Abbreviations

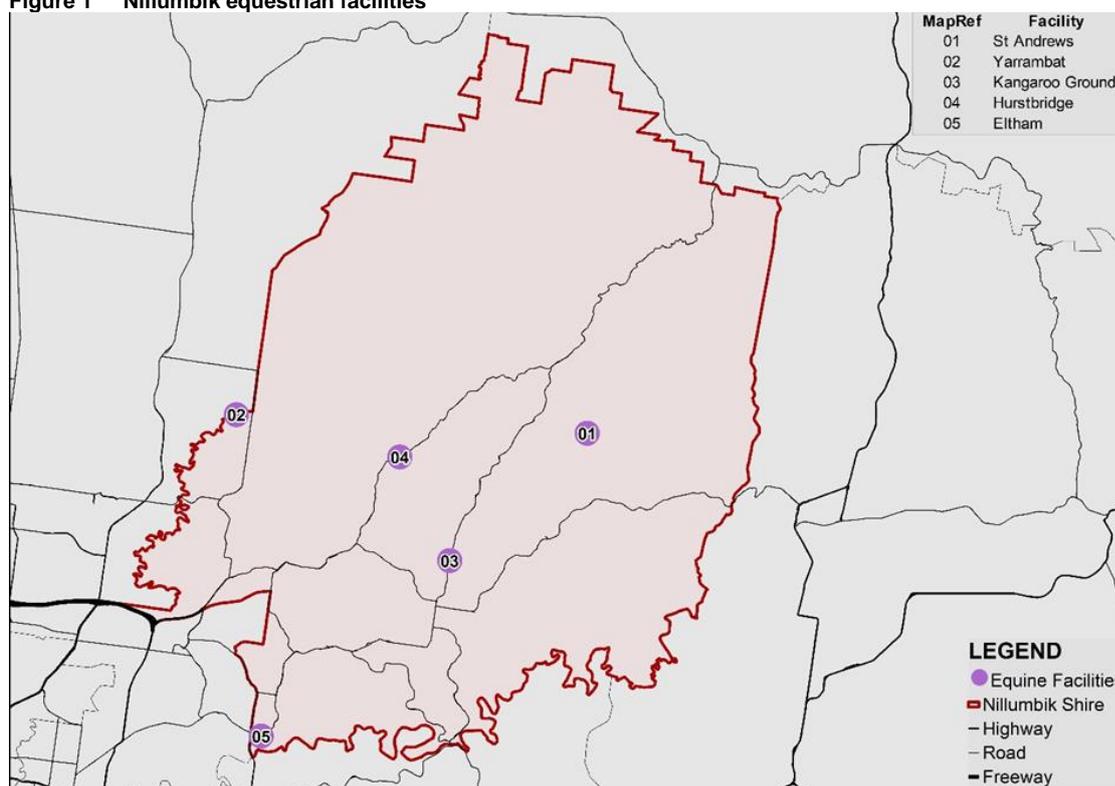
Abbreviation	Definition
ABS	Australian Bureau of Statistics
AWEC	Albury Wodonga Equestrian Centre
EA	Equestrian Australia
EV	Equestrian Victoria
FEI	Fédération Equestre Internationale
HRCAV	Horse Riding Clubs Association of Victoria
I-O	Input-Output
LGA	Local Government Area
NHAG	Nillumbik Horse Action Group
PCV	Pony Club Victoria
PPP	Public – Private Partnership
RDA	Riding Develops Ability
TTT	Top Team Trophy
WPNEC	Werribee Park National Equestrian Centre

Executive Summary

This report delivers an overview of equestrian infrastructure and events in Victoria and seeks to understand the nature of the equine sector within the Shire of Nillumbik (Nillumbik). It also describes the economic impact of the equestrian sector to Nillumbik and identifies potential equestrian market opportunities within Nillumbik. Involvement in equine activities usually requires substantial time and capital investment.

This report investigates the potential for additional equestrian facilities and builds on the already strong level of community involvement within the equine sector. Nillumbik has a long history of involvement in recreational horse riding and is home to ten adult riding and pony clubs at five different sites. The location of these sites can be seen in Figure 1. Currently, Nillumbik has a range of equestrian facilities including arenas, cross country courses and trials. The mix of these equestrian facilities with the natural bush, rural land and trails within Nillumbik continue to make it an attractive region for enthusiasts and fosters a multi-million-dollar equine industry.

Figure 1 Nillumbik equestrian facilities



Project Context

Project context was developed through a combination of desktop studies and consultation with representatives from equestrian clubs in Nillumbik and the broader equestrian community.

The three largest equestrian organisations in Victoria by membership number are Horse Riding Clubs Association of Victoria (HRCAV), Pony Clubs Victoria (PCV) and Equestrian Victoria (EV). EV's State Facility Plan identifies 55 equestrian venues across Victoria.

In Nillumbik, there are five equestrian facilities; Yarrambat, Eltham, Kangaroo Grounds, Hurstbridge and St Andrews (Figure 1). There are also widespread trail networks. Clubs are of various membership sizes with most holding monthly rallies and around three events each year. Most of these sites are leased from the Shire of Nillumbik with Kangaroo Ground Pony Club being the only organisation to own its ground.

An important characteristic of the equine community within Nillumbik is its reliance on volunteers. All clubs require members to contribute volunteer hours towards the maintenance of their grounds and

the running of their events. In addition to volunteering, members must commit to maintaining and transporting their horses. Participating in equestrian activities can not only provide a positive impact on the physical health of riders, but also on their mental health by providing a fulfilling and recreational outlet that can lead to a sense of personal purpose and a sense of belonging within the equine community¹. A study commissioned by Equestrian Australia (EA) also found that Equestrian (excluding all codes of horse racing, polo/ polocrosse, rodeo, western & tent pegging) contributed around \$12 million annually to physical and mental health².

Membership fees generally only cover the cost of insurance and instructors. These facilities have significant upkeep and replacement costs, relying on external funding to sustain operations. Fund raising events are conducted in order to provide these resources with the help of volunteers and community engagement. Most clubs are not able to raise the amount needed to fully maintain and upkeep their facilities to the highest standard possible.

The public survey completed as part of stakeholder consultation highlighted that most equine businesses in Nillumbik were small businesses with 42 percent earning less than \$20,000 in FY2017-18 and only 13 percent earning more than \$100,000.

Key equine disciplines practiced in Nillumbik include dressage, show jumping, eventing and cross country. There are currently no indoor arenas in Nillumbik and current sites are lacking in facilities that are required to host more competitions and events, including those at the highest level of the sport. Currently, Yarrambat is the only facility within Nillumbik that contains a suitably sized cross-country course which is only available for use to Yarrambat members and their guests. Yarrambat and Hurstbridge clubs have put in place membership caps due to limitations in the size of their venues and capacity for car parking. This limits the amount that these clubs can grow and hinders the equine sector from reaching its full participation potential. With significant growth in inter-school and entry level competitions in Victoria, there is rising demand for events and competition level venues.

Nillumbik has a widespread network of trails however there is potential for further linkages and off-road trails. During consultation, an emphasis was put around road safety and the need for safer off-road trails that decrease the risk of accidents. As riders are unrestrained and horses can be difficult to predict, they can be hit by vehicles moving at high speeds and/or thrown into oncoming traffic. This jeopardises not only the horse rider's safety but also that of other road users. Due to recent urbanisation and the increase in traffic, many riders feel unsafe riding on roads. This lack of connectivity has led to a decrease in participation with riders having to transport their horses even a short distance. Some other barriers to the use of trails included lack of information, poor quality of the trails and lack of parking.

Economic Impact

The economic value of the equestrian sector to Nillumbik's economy was assessed using Input-Output (I-O) analysis. I-O models capture the transactions that link industry sectors across the economy in a simplified form.

The Nillumbik equine industry contributes significantly to the regional economy and, more broadly, the state and national economies. Equestrian activities traditionally require significant time and capital investment as owning a horse necessitates a commitment to adequate care and retention of skills and education among the owners. There are significant responsibilities that go with the management and care of a horse(s). Money is spent on equipment and supplies such as feed, supplements, bedding, stabling, riding apparel. Costs can also include equine insurance, lessons and training, transport costs, veterinary services and facilities, property infrastructure and utilities applicable in keeping a horse(s).

For this report the types of impacts considered are initial spend as informed by consultation (actual value of goods and services purchased), the direct effect (value added and employment in the industry receiving initial impact) and the indirect effect (flow-on impacts that occur from secondary industries).

¹ Stakeholder consultation

² Community Impact Study, Sports Business Partners and Street Ryan commissioned by EA

Total economic impact = \$16.9m



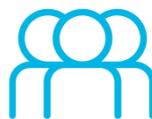
\$5.1m

**Initial
spend**



\$8.9m

**Direct
impact**



24

**FTE jobs
supported**



\$8.0m

**Indirect
impact**

From the survey initial spend was found to be \$5.1 million. Direct impacts total \$8.9 million and support 24 full time equivalent (FTE) jobs. Indirect impacts total \$8.0 million and contribute to a total economic impact of around \$16.9 million to Nillumbik each year. The industries that benefited the most include health care services, other agriculture (feed and supplements, property maintenance) and building/construction.

Opportunity assessment

The opportunity assessment has been informed by stakeholder consultation and desktop research. These consultations included an online survey which was completed by 426 people on behalf of their families (representing 904 horse riders in total), a workshop that was attended by around 70 participants and interviews with club representatives. This approach ensured that the report was informed by and considered the needs of a wide sample of stakeholders and further shows the strong level of engagement within the equine community.

From survey findings and consultation (workshop and interviews) the following opportunities were identified as areas for consideration. They will be reliant on further analysis which may include feasibility, cost-benefit and community interest.

- **An indoor arena.** Currently there are no indoor arenas within Nillumbik and there is strong demand for a venue that could be used in all weather conditions and low light. This could also benefit riders with disabilities that may be more sensitive to light and weather conditions. An indoor arena will be able to host more events and competitions as there would be no weather or light limitations.
- **A larger venue.** Yarrambat is the only facility within Nillumbik that contains a suitably sized cross-country course. This is only available to Yarrambat members and their guests. There is an opportunity to develop a larger venue that could be used to hold a variety of competitions and attract visitors and equestrian talent to Nillumbik. This arena could also be utilised by Interschool Equestrian which is one of the fastest growing sports in Victoria. A larger arena would be a drawcard for events and competitions, which will support important visitor dollars flow into the Shire.
- **Access to and improved connectivity for trails on public land.** Horse, rider and driver safety were identified as a key issue in areas where trails and roads are in close proximity. Improving shared trails away from the road network and developing a horse safety campaign could deliver improved safety outcomes and will also benefit bike riders and walkers/hikers. More linkages and promotions of trails could increase utilisation and attract equine tourists from outside Nillumbik. Nillumbik Shire Council is currently investigating developing a mobile application that will provide information and promote trails in Nillumbik.

1.0 Introduction

1.1 Project purpose and objective

The purpose of this report is to identify and assess equine industry opportunities for the Shire of Nillumbik (Nillumbik) that are supported by evidence and that align with the views and aspirations of industry stakeholders. More specifically, the key objectives of this report are to:

- Complete an industry assessment that outlines the principal features of the equine market in Victoria
- Document the existing equine facilities for events, activities and training within Nillumbik, their features, users and type of equestrian events for which they can cater
- Undertake an economic analysis of the Nillumbik equine industry
- Identify potential equestrian opportunities for Nillumbik.

1.2 Shire of Nillumbik overview

Nillumbik is located in Greater Melbourne's north east. It has a population of around 65,000 people and covers a land area of approximately 430 square kilometres, with an average population density of nearly 150 people per square kilometre³. The population is unevenly distributed, however, with higher population densities in the south western portion of Nillumbik and lower population densities in the central and northern portions. Nillumbik is bounded by Kinglake National Park to the north, the Yarra escarpment in the east, the Yarra River in the south and Plenty River and Yan Yean Road in the west.

Compared to Greater Melbourne and Victoria, Nillumbik has an appreciably greater median age, proportion of couples with children, median weekly household income and labour participation rate, as well as a lower proportion of households renting (refer Table 1).

Table 1 Nillumbik demographic context

Demographic factor	Nillumbik	Greater Melbourne	Victoria
Median age	41	36	37
Couples with children	47%	33%	31%
Median weekly household income	\$2,093	\$1,539	\$1,416
Households renting	9%	29%	28%
Labour participation rate	69%	62%	60%
Population forecast growth estimate (2018-36)	9.14%	35.48%*	32.13%*

Source: .idcommunity community profile (2018); Shire of Nillumbik (2018); Victoria in Future (2016)

*estimate based on Victoria in Future 2016 (DELWP)

1.3 Equestrian industry overview

Horses and humans have a deep shared history, with horses historically having significant influence on economic growth, the outcomes of war and the connection of communities across a range of countries and cultures. As countries have modernised over recent centuries, the relationship between horses and humans has evolved, however, horses still play a central role in many people's lives around the globe.

Founded in 1921 and headquartered in Switzerland, the International Federation for Equestrian Sports (*Fédération Équestre Internationale* – FEI) is the international governing body of equestrian sport. The FEI recognises seven equestrian disciplines (jumping, dressage and para-dressage, eventing, driving

³ .idcommunity

and para-driving, endurance, vaulting and reining), which are governed by a FEI code of conduct that is designed to protect the welfare of athletes, both human and horse⁴. FEI states the following:

Equestrianism is the only sport that involves two athletes, equine and human. It is the successful partnership between these two elements; the relationship of confidence and respect that is built up between them, that makes the sport so exceptional.

Equestrian Australia (EA) is the national governing body of equestrian sports in Australia and has been affiliated with the FEI since 1951. EA has seven branches, one for each Australian state and territory, excluding Canberra. Although the Victorian branch of EA – Equestrian Victoria – recognises the same seven disciplines as the FEI, there are many other equestrian bodies operating in Victoria that offer other equine disciplines. Table 2 details the main equine disciplines on offer.

Table 2 Equine disciplines

Discipline	Description
Show jumping	This timed event involves show jumping obstacles (single vertical and elevated horizontal obstacles), usually with many turns and changes of direction.
Dressage and para-dressage	Dressage is the art of training and riding a horse in a manner that develops obedience, flexibility and balance.
Eventing	Eventing is an equestrian event where a single horse and rider combination compete against other combinations across the disciplines of dressage, cross-country and show jumping
Driving and para-driving	Carriage driving is a form of competitive horse driving in harness in which two or four wheeled carriages are pulled by a single horse, a pair, tandem or a four-in-hand team
Endurance riding	Endurance is a timed long-distance competition that tests the endurance of a horse and challenges the rider over their effective use of pace, knowledge of their horse's capabilities
Vaulting	Vaulting is most often described as gymnastics, acrobatics or dance on a horse. It is typically choreographed, with competitors competing in compulsory and freestyle categories.
Reining	Reining is a western riding competition for horses where the rider guides the horses through a precise pattern of circles, spins and stops. The horse should be willingly guided.
Cross-country	The objective of cross country is to prove the speed, endurance and jumping ability of the horse, as well as demonstrate the rider's knowledge of pace and confidence in horse control.
Trail riding	Trail riding is a generally relaxed discipline that involves riding outdoors on trails and paths.
Livestock/western disciplines	There are multiple livestock and western disciplines. The main ones include: <ul style="list-style-type: none"> • Cutting – whereby horse and rider demonstrate ability to handle cattle • Campdrafting – similar to cutting, but the rider must 'cut out' one cow from the heard and demonstrate control over it • Tent pegging – a cavalry sport comprising games with the use of ground targets
Polo and polocrosse	Polo involves two teams on horseback with competitors using a long-handled mallet to drive a wooden ball through goalposts. Polocrosse is similar to polo, however, instead of a wooden mallet and ball, competitors use a lacrosse style racquet to handle the ball.
Mounted games	Mounted games is a branch of equestrian sport in which very fast games are played by people of all ages on ponies. It requires a high degree of athletic ability, riding skills and hand-eye coordination. Games involve individual, pair and team games.

⁴ <https://www.fei.org/search>

2.0 Methodology

The methodology for this report was developed with an objective to maximise the evidence base upon which the project team and stakeholders could identify market gaps and opportunities. This approach seeks to ensure that the opportunities identified are feasible and align with government strategies and stakeholder knowledge and interests, rather than being based on the interest and knowledge of a small number of people. Key components of the methodology included the following:

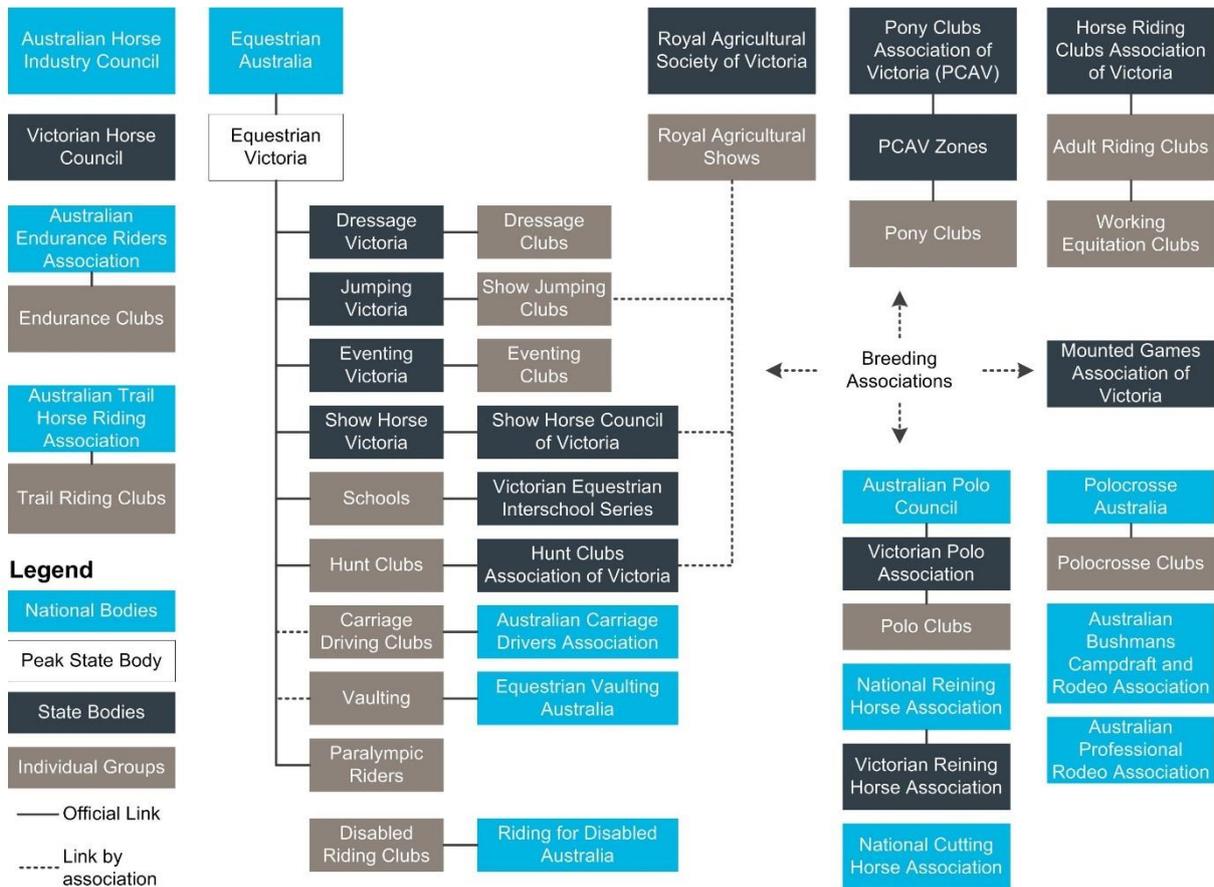
- **Data gathering and desktop research.** The purpose of this task is to understand the current context of the equine industry in Victoria, trends, events and existing infrastructure. Publicly available documents and data were sourced, including:
 - The *Equestrian State Facility Plan* (Volume 1: Final Report and Volume 2: Summary of Market Research and Consultation)
 - Various websites, including EV, HRCVA, PCV and other equestrian bodies and organisations that have an appreciable presence in Victoria or Nillumbik
 - ABS data
- **Stakeholder consultation.** Stakeholder consultation comprised three components that sought to validate the findings of tasks as well as identify gaps and opportunities within Nillumbik:
 - A local engagement session that was attended by around 70 participants
 - Structured one on one interviews with seven key stakeholders, including five representatives from Nillumbik's horse and pony clubs, one representative from Nillumbik Horse Action Group and a member of the Australian Horse Industry Council. These interviews were arranged by the Council and conducted by AECOM.
 - An online survey, which was completed by 426 people on behalf of their families (representing 904 horse riders in total).
- **Economic impact analysis.** Drawing upon outputs from the online survey and ABS Input-Output (I-O) multipliers, the economic impact of the equine industry within Nillumbik was analysed. Refer to section 4.0 for a detailed description of the economic impact analysis.

3.0 Project context

3.1 Victorian equine context

EV's *State Facility Plan* (2017), which is supported by Sport and Recreation Victoria and is based on analysis of market data and consultation with stakeholders, estimates that there are nearly 55,000 participants in equestrian sports in Victoria, of which 79 percent (around 43,000 people) are female. This represents approximately 0.9 percent of the State's total population, or 1.4 percent of the female population and 0.4 percent of the male population. The report highlights that most organisations have experienced growth in participation in recent years, with most growth occurring among women and youth, as well as in inter-school competitions. As a result of growth in these segments, there is strong demand for participation in entry-level competitions. The structure of, and relationship between, equestrian bodies and groups in Victoria is complex (refer Figure 2).

Figure 2 Equine industry structure – Victoria

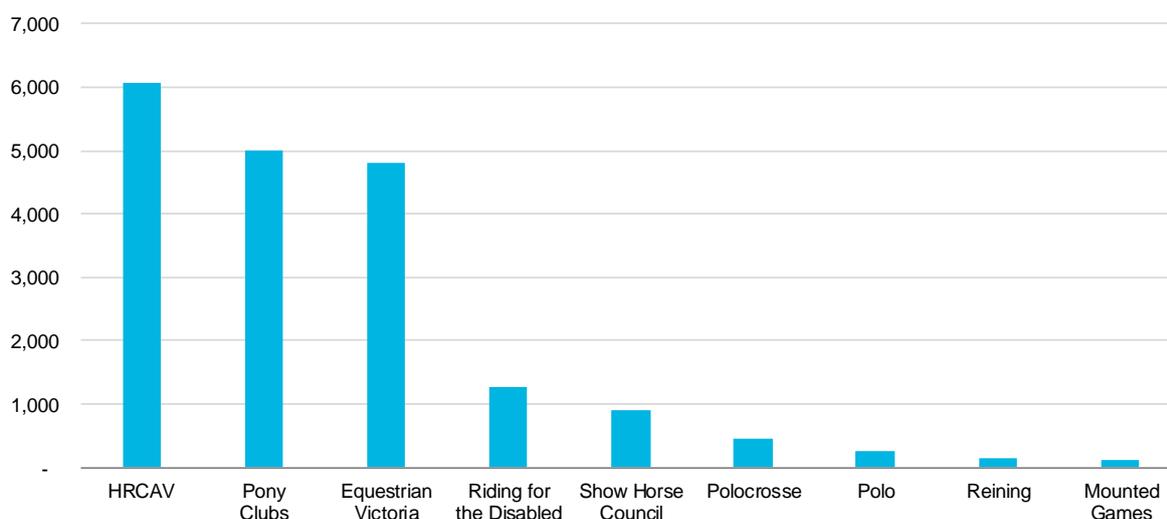


Source: Equestrian Victoria State Equestrian Facility Plan

While reports prepared and commissioned by EA and EV conclude that there is scope for growth of participation in equestrian events and activities, they also identify various strategic challenges. The most notable challenge is associated with the complexity of the governance hierarchy, which comprises over 50 State and National Committees and Boards. This limits the sport's ability to understand and market to its audience, attract commercial partners and formalise a holistic approach to develop athletes, coaches and officials.

The three largest equestrian organisations in Victoria by membership number are HRCAV with over 6,000 Victorian members, PCV with around 5,000 Victorian members and EV with nearly 5,000 Victorian members (refer Figure 3). EV is the peak equestrian body in Victoria for seven core disciplines (jumping, dressage and para-dressage, eventing, driving and para-driving, endurance, vaulting and reining), while HRCAV and Pony Clubs Victoria cater to slightly different markets. HRCAV provides for a wide range of riders who enjoy the social aspect of club membership as well as access to organised competitions. HRCAV caters for beginner riders right through to experienced competitors. The Pony Club movement is an international voluntary organisation for young people interested in horses and riding. One of the primary purposes of PCV is to provide children and young adults with the opportunity to build and develop character, responsibility and consideration for others through involvement with a living animal.

Figure 3 Equestrian organisation membership numbers (2017)



Source: Equestrian Victoria State Equestrian Facility Plan

3.1.1 Major facilities

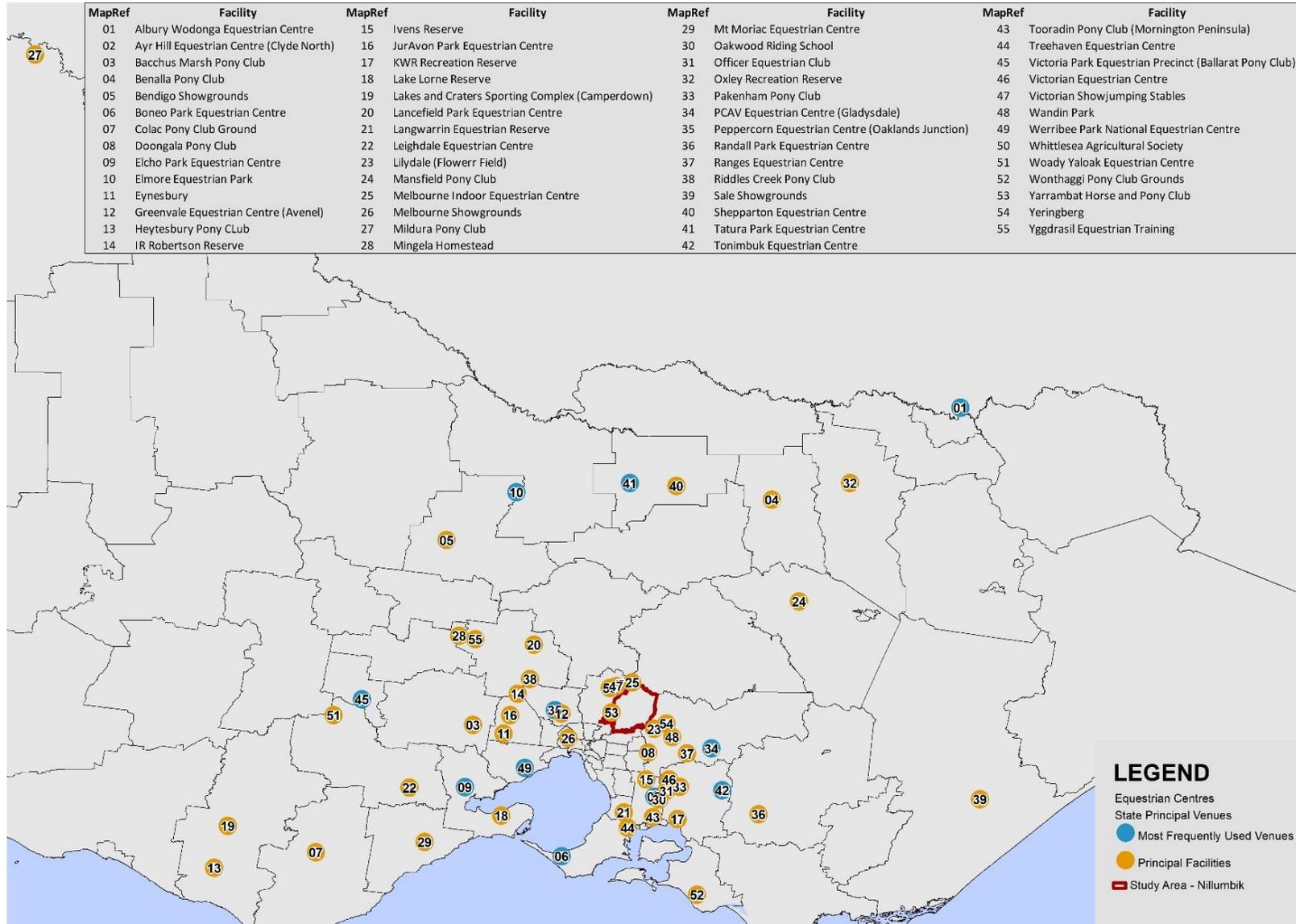
EV's *State Facility Plan* identifies 55 equestrian venues across Victoria; 11 of which are frequently used for events and are thus the most significant in terms of participation access. The 11 facilities identified in the *State Facility Plan* are Albury Wodonga Equestrian Centre, Ayr Hill Equestrian Centre, Boneo Park Equestrian Centre, Elcho Park Equestrian Centre, Elmore Equestrian Centre, Peppercorn Equestrian Centre, Pony Club of Victoria Equestrian Centre – Gladysdale, Tatura Park Equestrian Centre, Tonimbuk Equestrian Centre, Victoria Park Equestrian Centre (Ballarat) and Werribee Park National Equestrian Centre. It should be noted that only four of these (Boneo, Tonimbuk, Victoria Park in Ballarat and Werribee) are common with the nine centres used for Fédération Equestre Internationale (FEI) events in 2018.

The 55 venues identified in EV's *State Facility Plan* are illustrated in Figure 4 while characteristics of the 11 most significant facilities including the type of events they hold are described in Table 3.

The main gaps in venue provision in the state identified by equestrian organisations are for dressage and reining in the east of Victoria and dressage facilities in the west of Victoria. There is a view that there is a need to upgrade and raise the standard of existing facilities generally. As part of its strategic direction EV seeks to address gaps in facility provision and ensure each region has a venue(s) of an appropriate standard to conduct events in the high participation disciplines.

Yarrambat Horse and Pony club is the only principle facility located in Nillumbik (Figure 4). In comparison, the adjoining City of Whittlesea contains three principle facilities and the Yarra Ranges Shire contains five.

Figure 4 Victorian equestrian facilities



Source: Equestrian Victoria State Equestrian Facility Plan

Table 3 State significant facilities

Facility	Design elements	Demand and attendance
<p>Albury Wodonga Equestrian Centre (AWEC) Located in Albury, AWEC is a not-for-profit sporting organisation comprising a number of affiliated equestrian clubs and over 200 individual members (approx. 300 km from Nillumbik)</p>	<p>AWEC comprises 97 ha of land at Thurgoona in the northern part of Albury. Facilities include 40 covered yards, 40 stables, 200 day yards, concrete wash bays, a 70 x 110 metre sand arena with lighting, a grass arena, 5 turf polocrosse fields, a rodeo and camp draft arena with shed and yards, an international cross country course from level 3 to pony club level, club rooms, 54 powered camping sites and an amenities block (20 showers, 16 toilets, wash basins and storeroom) and a 30 x 10 metre catering and administration shed.</p>	<p>AWEC facilities are used regularly by its affiliated clubs. Events include horse trials, dressage, adult riding, pony club events, polocrosse, tent pegging, show jumping, camp drafting and cutting. The facilities are also used regularly by pleasure and individual riders. In 2017 AWEC hosted 56 events over 113 days (events included clinics, training, competition and non-equine related events such as school cross-country running).</p>
<p>Ayr Hill Equestrian Centre A privately-owned facility in Clyde North that serves the needs of Hillcrest Christian College and Rivercrest Christian College, as well as regional colleges and the broader equestrian community (approx. 75 km from Nillumbik)</p>	<p>Ayr Hill Equestrian Centre is suited to facilitate small clinics and private hire for small to large events. Facilities include a 72 x 36 metre covered sand arena, 100 x 30 metre and 83 x 72 metre open sand arenas and sand warm up area, 4 hectares of grass polo field suitable for show jumping, dressage and mounted games, 10 stables with two wash bays, judges boxes, undercover and outdoor day yards, an amenities block with showers and toilets, a first aid facility and catering for more than 80 people.</p>	<p>Ayr Hill Equestrian Park regularly holds and attracts activities which include interschool equestrian competitions, show jumping competitions, dressage competitions, after school lessons, school holiday program for school children, showing clinics, show jumping training nights, dressage clinics, mounted games competitions, western and natural horsemanship days and pony club days.</p>
<p>Boneo Park Equestrian Centre This privately owned Equestrian Centre on the Mornington Peninsula hires out its facilities for equestrian events and non-equine events such as weddings, conferences and other formal and informal gatherings (approx. 110 km from Nillumbik)</p>	<p>Boneo Park Equestrian Centre (BPEC) is 345 hectares with around 120 hectares having the potential to be developed. It contains an indoor arena (66 x 30 metres) and several outdoor arenas (the main outdoor arena is 75 x 85 metres). It has a temporary grandstand which can seat up to 500 people. The arena surface is imported from Belgium, and comprises fibre mixed with sand. BPEC also contains 159 stables for hire at events, plus an additional 20 private stables, as well as catering facilities and a café on site.</p>	<p>BPEC caters mainly for dressage and show jumping. It holds a mix of national, local and regional events. Many are generated by Boneo Park itself. Boneo Park is in direct competition with Werribee Park National Equestrian Centre.</p>
<p>Elcho Park Equestrian Centre This Equestrian Centre in Lara is owned by the City of Greater Geelong (approx. 125 km from Nillumbik)</p>	<p>Elcho Park is a 30-hectare facility that contains eight permanent surfaced dressage arenas (20 x 60 metres), sand show jumping arenas (between 40 to 60 metres wide and 60 to 90 metres long), fenced riding areas, a level 5 to level 1 cross country course, over 200 horse yards, horse wash, round yard, toilet and shower blocks. Clubrooms include showers, a commercial kitchen and seating for approximately 100 people. Upstairs are club offices and a large viewing / scoring room with views overlooking the whole grounds.</p>	<p>In 2017 Elcho Park Equestrian Centre hosted 43 events (including clinics, training and competitions) over 84 days.</p>
<p>Elmore Equestrian Centre Elmore Park is a registered not-for-profit organisation and is community owned and operated (approx. 175 km from Nillumbik)</p>	<p>Elmore Equestrian Park contains an indoor arena with a sand area of 44m x 88m as well as a stage area, offices and catering facilities; 6 outdoor sand arenas with 2 sand warm up arenas, an office, kitchen and catering facilities; 7 hectare grassed arena; under cover stabling for more than 100 horses and outdoor horse yards for more than 100 horses.</p>	<p>Elmore Equestrian Park has the capacity to cater for equestrian events of all sizes and disciplines, including dressage, barrel racing, polocrosse, interschool competition, carriage driving, show jumping, western, showing, cutting, training clinics.</p>

Facility	Design elements	Demand and attendance
Peppercorn Equestrian Centre The privately-owned Peppercorn Equestrian Centre is located at Oaklands Junction, 5 minutes from the Melbourne Airport (approx. 50 km from Nillumbik)	Facilities include an indoor riding arena and three floodlit outdoor arenas, as well as show jumping and cross-country jumping equipment.	Peppercorn Equestrian Centre provides 1/2 hour and 1 hour long private lessons as well as group lessons for riders of all ages and skill levels. Lessons can be booked most days between 9:00am and 5:30pm. It also hosts Pony Club on Saturday mornings and school holiday programs.
Pony Club of Victoria Equestrian Centre Located in Gladysdale (approx. 60 km from Nillumbik)	Pony Club of Victoria Equestrian Centre comprises an indoor facility, outdoor dressage sand arenas, multipurpose sand arenas, grass arenas and a cross country arena.	The facility handles State competitions as well as skill clinics and development weekends
Tatura Park Tatura's Equestrian Centre is owned and operated by the City of Greater Shepparton (approx. 175 km from Nillumbik)	Tatura Park comprises a 75 x 35 metre indoor sand area which contains fixed seating for 300 people and a designated warm up arena that is adjacent to main arena. It also contains a 70 x 30 metre outdoor grass arena, a function centre for up to 350 people, 200 enclosed undercover stables, car and float parking, powered and unpowered caravan and camping sites and associated amenities (toilets and showers).	In addition to equestrian events Tatura Park also hosts a number of annual events, including International Dairy Week (the second largest dairy show in the world), the National Alpaca Show and Sale and many other successful livestock events.
Tonimbuk Equestrian Centre Located in the Shire of Cardinia (approx. 100 km from Nillumbik)	Tonimbuk Equestrian Centre comprises two indoor arenas, two outdoor arenas and a cross country field. It also contains stables, under cover yards and camping facilities.	Tonimbuk hosted 70 events in 2017, 55 of which were show jumping lessons.
Victoria Park Equestrian Centre This facility is located approximately 5 kilometres from the Ballarat CBD and is owned by the City of Ballarat (approx. 150 km from Nillumbik)	The 2018 International Horse Trial comprised facilities for three equestrian disciplines - dressage, show jumping and navigation of a 3-4 kilometre course with cross country obstacles.	Ballarat's Victoria Park Equestrian Precinct located on Winter Street, holds a small number of events each year, with one of them in 2018 being the International Horse Trials. The International Horse Trials hosted more than 400 riders from Australia and overseas, with spectators coming from as far as England to witness the event.
Werribee Park National Equestrian Centre (WPNEC) This is Victoria's designated State Centre for equestrian activity and has a focus for major equestrian events and elite training in Victoria (approx. 80 km from Nillumbik)	WPNEC is situated on Crown Land and is leased to WPNEC – an incorporated body with a Board of Management comprising 50% EV and 50% Victorian Polo Association representation. EV is based at WPNEC. WPNEC comprises two indoor arenas, three polo fields, two show jumping areas, five sand dressage areas, a cross country course including obstacles, over 200 horse stables and a competition warm-up and holding area. It also has 147 powered camping sites and 170 unpowered camping sites which includes toilet and shower facilities.	As the premier equestrian facility in Victoria, WPNEC holds world class events across a range of equestrian disciplines and events. One-on-one stakeholder consultation highlighted that Werribee is an ageing facility that is often at capacity, with many equestrian events that are suited to WPNEC having to go elsewhere. WPNEC's facilities are also inadequate for carriage driving.

3.1.2 Major events

In 2018 Victoria hosted 17 FEI events. These events by location and discipline are shown in Table 4. Undertaken at 9 different equine centres, they encompass six eventing competitions, five dressage competitions, five show jumping competitions and one driving competition. 12 events are multi-day competitions, while the remaining five are single day competitions. Only two events are undertaken indoor, one at the Werribee Park National Equestrian Centre and the other at Melbourne Showgrounds for EQUITANA Melbourne. Most events are for senior riders only, with just six events having positions for other rider groups such as junior riders, under 25 riders and para-equestrian riders.

Table 4 FEI events in Victoria in 2018

Location	Discipline	Date	Rider categories	Environment
Ballarat	Eventing	12-13 May	Senior riders only	Outdoor
Boneo	Dressage	25-28 Jan	Senior riders; junior riders; under 25 riders; pony riders; young riders; senior para-equestrian riders	Outdoor
Boneo	Jumping	28 Jan	Senior riders only	Outdoor
Boneo	Dressage	14-17 Jun	Senior riders; junior riders; under 25 riders; pony riders; young riders	Outdoor
Boneo	Dressage	18-21 Oct	Senior riders; junior riders; under 25 riders; young riders	Outdoor
Camperdown	Eventing	19-22 Apr	Senior riders; junior riders; young riders	Outdoor
Greenvale	Driving	27-29 Apr	single driving (horse, pony); pair driving (horse, pony); four-in-hand driving (horse, pony)	Outdoor
Melbourne	Dressage	15-18 Nov	Senior riders only (EQUITANA)	Indoor
Melbourne	Jumping	25 Sep	Senior riders only (Melbourne Royal Show)	Outdoor
Sale	Jumping	4 Feb	Senior riders only	Outdoor
Sake	Jumping	25 Nov	Senior riders only	Outdoor
Tonimbuk	Jumping	21 Jan	Senior riders only	Outdoor
Tonimbuk	Eventing	10-11 Mar	Senior riders only	Outdoor
Wandin	Eventing	17-18 Mar	Senior riders only	Outdoor
Werribee	Dressage	22-25 Mar	Senior riders only	Indoor
Werribee	Eventing	7-11 Jun	Senior riders; junior riders	Outdoor
Werribee	Eventing	8-9 Sep	Senior riders only	Outdoor

3.1.3 Club and discipline trends

A survey conducted by EV assessed participation trends experienced by equestrian organisations practicing in Victoria. Table 5 details membership rates of the organisations surveyed along with comments made by stakeholders on trends in demand for the equine industry in Victoria.

Table 5. Membership trends in key equestrian organisations

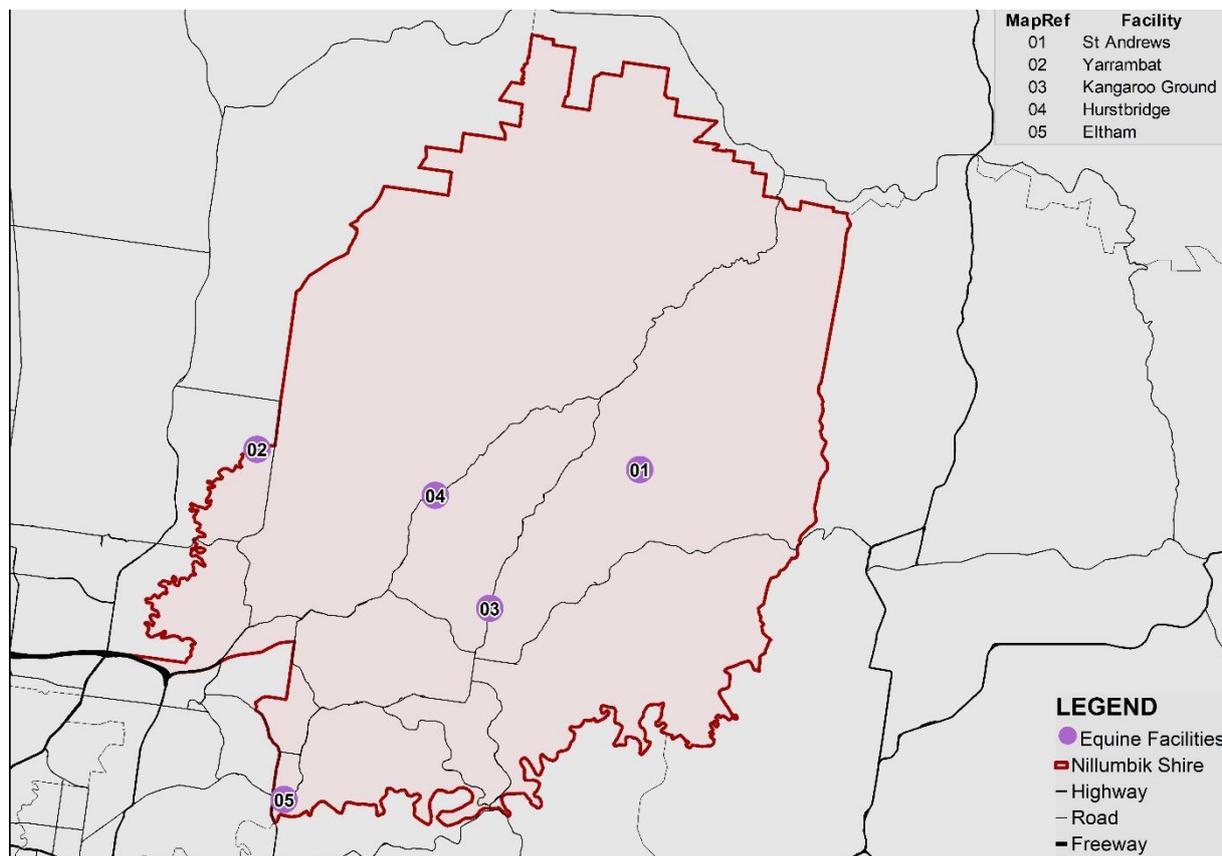
Organisation	Membership	Trends in participation
Eventing Victoria	500	<ul style="list-style-type: none"> High growth in recent years Growth mainly in inter school competition
PCV	5,000	<ul style="list-style-type: none"> Has declined in recent years Mostly under 16s Fewer numbers in high level competitions Equestrian organisations having to compete for the same market
HRCVA	6,060	<ul style="list-style-type: none"> Averaging 10 percent growth per year. Mostly female. Members join because collegiate with rallies and clinics Major events are growing
Dressage Victoria	2,000	<ul style="list-style-type: none"> Around 10 percent growth per year Only conducts major events
Australia Polo Federation/ Vic Polo Federation	250(Vic) 800 (Aust)	<ul style="list-style-type: none"> Women are the fastest growing demographic especially 18-30 age group
Show Horse Council of Victoria	900	<ul style="list-style-type: none"> 8 percent growth in the last 12 months Want to develop entry level category as the main focus is currently on elite
Victoria Reining Horse Association	130 including 30 non active members	<ul style="list-style-type: none"> An upward trend in entry level and youth while adult membership has declined
Riding for Disabled Victoria	1,252	<ul style="list-style-type: none"> 20 percent growth in membership over the last three years 300 people are currently on a waiting list Demand from riders with an acquired disability who can no longer join mainstream organisations
Riding for Disabled Australia	6,624	<ul style="list-style-type: none"> Active riding membership has grown 9 percent over the last three years while non active membership has decreased Increase in riders with autism
Mounted Games Victoria	80-100	<ul style="list-style-type: none"> Membership varies but is reasonably stable Looking to grow Strong participation from pony club members Mostly in the East of Melbourne
Victorian Horse Council	Advocacy group for all equine sports and activities	<ul style="list-style-type: none"> Camp drafting is growing 80 percent of brood mares are in QLD, NSW and VIC
Australian Stock Horse Society	Over 9,500	<ul style="list-style-type: none"> n/a
Polocrosse Association of Australia (PAA)	Numbers are relatively steady though do fluctuate	<ul style="list-style-type: none"> The majority of members are in QLD, NSW followed by WA and then VIC

Source: Equestrian Victoria State Equestrian Facility Plan

3.2 Regional equine context

Nillumbik contains five equestrian facilities and an extensive network of recreational trails. The five equestrian facilities are located in Eltham, Hurstbridge, St Andrews, Yarrambat and Kangaroo Grounds. The location of these facilities is illustrated in Figure 5.

Figure 5 Nillumbik equestrian facilities



Source: Desktop research and consultation

Each facility shown in Figure 5 hosts at least two clubs, an adult riding club and a pony club. St Andrews also hosts a Riding Develops Ability (RDA) club. Each of these clubs are governed by their own committees, however, at each facility the clubs work together to make decisions relating to maintenance works, facility upgrades and equipment needs. Annuals fees for clubs are typically between \$300 to \$400 a year. This fee includes the cost of insurance, membership of parent association (i.e. HRCV or PCV) and a club fee that contributes towards the cost of instructors and maintenance. From consultation it was found that:

'Membership fees are not enough to cover the cost of maintaining and upgrading the grounds. As clubs are fully responsible for the maintenance for their grounds as well as any upgrades that may be required, fund raising events are held during the year with the help of volunteers.'

Most club facilities are leased from Council, with Kangaroo Ground Pony Club being the only club that owns its grounds. The Yarrambat adult riding and pony clubs have a three-year co-lease and are planning on applying for a five-year lease at the next renewal. The Hurstbridge grounds are leased from council by the Hurstbridge Pony Club on a five-year lease. St Andrews Pony Club leases 35 acres of land from the council on a 99-year lease and pays a fee each year for the rest of the land on a separate lease.

3.2.1 Major facilities

St Andrews

Located on Clinton's Road, Smiths Gully, the St Andrews site is used by the St Andrews Adult Riding Club and the St Andrews Pony Club.

The St Andrews Adult Riding Club has 20 members in 2019 and holds rallies on the first Sunday and third Saturday of each month. The club also held one event in 2019, a dressage day that attracted around 200 visitors including 90 competitors.

The St Andrews Pony club has around 40 members. It holds rallies on the second Sunday of each month and two events a year, one for dressage and the other for show jumping. The existing infrastructure and limitations of the St Andrews facility are described in Table 6.

Table 6 St Andrews Existing Infrastructure and Limitations

Existing Infrastructure	Limitation of Infrastructure
<p>Parking and Access Facilities</p> <ul style="list-style-type: none"> There are grass and stone parking areas. Grass area is 4WD only. Most of the parking is on a hill with a small flat area that can hold four cars. This is suitable for RDA <p>Building Structures</p> <ul style="list-style-type: none"> Toilets (one disabled, one male and one female) Club house which is always open to the public and contains a locked store room, small kitchen, open area and locked office. Shed for storage to keep freezer, flags, rope, equipment etc <p>Arenas</p> <ul style="list-style-type: none"> One 75 m by 75 m Olympic size show jumping arena. This arena is used for dressage, show jumping, galloping, etc and can be divided it into three arenas. Two dressage and one show jumping per rally Three 20 m by 40 m arenas A Riding for Disabled arena that is fully fenced A cross country course 	<ul style="list-style-type: none"> More space required as the club rooms are very full An area out the back will be useful where people can line up for events, registration etc Cost of maintenance and getting enough volunteer hours can be a challenge Parking on the side of hill is not easy The shed sometimes has issues with rain Undulating land which can be challenging and is not suitable for galloping Parking capacity is capped at 90 Arena corners are sometimes flooded in winter

Yarrambat

Located in Yarrambat Park, Yan Yean Rd, the Yarrambat site is used by the Yarrambat Adult Riding Club and the Yarrambat Pony Club. Both clubs have 80 members. This membership is capped at 80 the size of the venue, capacity for car parking and the cost of instructors for each rally.

The Adult Riding Club holds a rally each month of the year excluding January. The club held a two-day dressage competition in April and a one day show jumping event.

The Pony Club also holds a rally day 11 months of the year excluding January, however, this is on a different day to the Adult Riding Club. Annual horse trail rides are also held which are attended by around 200 to 250 riders over a weekend. The pony club holds an annual show jumping competition in July and around two mounted games each year. A mid-week dressage competition is organised in partnership with the Hurstbridge and Whittlesea clubs. Each club hosts a mid-week competition over a three-month period. The existing infrastructure and limitations of the Yarrambat facility are outlined in Table 7.

Table 7 Yarrambat Existing Infrastructure and Limitations

Existing Infrastructure	Limitation of Infrastructure
<p>Parking and Access Facilities</p> <ul style="list-style-type: none"> • A main float car park holds around 20 to 30 cars and floats. This is a secure car park • For competitions and larger events, a trotting track that surrounds the arenas (is no longer in use for trotting due to its poor condition) is used. The trotting track is suitable as a warm up area and can hold around 150 cars and floats • An external car park that can hold around 100 cars and floats and can also accommodate people that wish to camp overnight during multiple day events <p>Building Structures</p> <ul style="list-style-type: none"> • Two female toilets and two male toilets connected to a septic tank. On a big event day around six portable toilets are bought in to accommodate extra people. • 64 yards that are bare and are rented out on event/competition days. • Three sheds. One has fully functional canteen/kitchen and the other two are equipment sheds that are each around 15 m by 15 m <p>Arenas</p> <ul style="list-style-type: none"> • One 60 m by 20 m permanent arena • Two large sand arenas. One is around 100 m by 80 m and is used primarily for dressage. The other is around 80 m by 80 m and is used primarily for show jumping. There are permanent jumps on this arena • A 40 to 50 acre cross-country course with multiple jumps. This is the largest cross-country course within a 50 km radius 	<ul style="list-style-type: none"> • One shed is less than 20 years old, but all other infrastructure has been in place for over 20 years • There is no undercover stabling • There are no DDA compliant toilets • The main car park is bare earth so can be difficult to access in the rain • There are no lights. The facility would be used more frequently if there was good lighting • Fencing is an issue that is currently being addressed. There have been issues in the past with people breaking through fencing and driving onto arenas to do burnouts/skids. This damages the arenas. Every five years they top up the sand at a cost of approximately \$10,000 per large sand arena. • Access to the site. It's easy to enter the site but hard to exit • The Club membership is capped at 80. This due to the size of the venue, capacity for car parking and the cost of instructors for each rally • In 2018, Yarrambat hosted three mid-week dressage competitions one month apart. In 2019 Hurstbridge, Whittlesea and Yarrambat will each host a Wednesday event as there were challenges attracting volunteers to assist

Hurstbridge

The Hurstbridge Facility is located at the rear of St Peter's Church, Heidelberg-Kinglake Road, Hurstbridge and hosts the Hurstbridge Adult Riding Club as well as the Hurstbridge Pony Club.

Hurstbridge Adult Riding Club is one of the largest clubs in Nillumbik with 115 members in 2019. Membership is capped at 120 members. The Pony Club has 40 to 50 members as at 2019. The Adult Riding Club aims to host three events each year. These events are generally timed to provide lead-up training for Top Team Trophy (TTT) events. TTT events are popular inter-club competitions hosted by HRCav clubs. In 2019, Hurstbridge Adult Riding Club is hosting two dressage events and one show jumping event. Over 80 people are expected to attend each event. A mid-week dressage competition is also held that is organised in partnership with Yarrambat and Whittlesea clubs. Each club will host a mid-week competition over a three-month period. The club also holds a rally every Wednesday and the first and third Saturdays of each month. Most are attended by at ten to 20 riders with at least two instructors.

The Hurstbridge Pony Club holds rallies once a month and events throughout the year which attract a high level of attendance. The existing infrastructure and limitations of the Hurstbridge facility are outlined in Table 8

Table 8 Hurstbridge Existing Infrastructure and Limitations

Existing Infrastructure	Limitation of Infrastructure
<p>Parking and Access Facilities</p> <ul style="list-style-type: none"> Paddocks next door (owned by Bridges Hotel Restaurant) are used for parking during events. <p>Building Structures</p> <ul style="list-style-type: none"> A club house containing a kitchen, three toilets, a storage room and an open space to hold meetings. Two equipment storage sheds. An old shed that is around 6 m by 6 m, and a relatively new shed that is around 15 m by 7 m. <p>Arenas</p> <ul style="list-style-type: none"> A 65 m by 70 m arena and can fit two dressage arenas. New sand was added around five years ago and is still in relatively good condition A 60 m by 70 m arena that is primarily used for show jumping. 	<ul style="list-style-type: none"> A TTT event organised by Hurstbridge was held at the Greenvale Equestrian Centre, a venue that is a considerable distance away from Hurstbridge. This was due to Hurstbridge not having the required infrastructure at their grounds or within the Shire to host the ~250 riders over the course of the weekend. The Pony Club would like to host horse trials as a way of generating funds for the club, but there is no facility locally for them to hold this. There is a demand for a cross country training facility for all clubs to have access to. Currently the club regularly hires facilities at Wandin and Yarra Glen to hold cross country training sessions for their riders. The 60 m by 70 m arena has been flooded twice and a considerable amount of sand was washed away.

Kangaroo Ground

Located on Kangaroo Ground and Panton Hill Road, Kangaroo Ground, the site is used by the Adult Riding and Pony Club. The Adult Riding Club has 35 members. Rallies are held every Thursday and first Saturday and Sunday of the month. Events are held three times a year. The most recent event drew 55 entries for a midweek Show Jumping competition. A dressage day will be held in October and showing day in August. The Pony Club holds a rally once a month and runs around two to three events a year. Table 9 below describes existing infrastructure and limitations of the Kangaroo Ground equine facility.

Table 9 Kangaroo Grounds Existing Infrastructure and Limitations

Existing Infrastructure	Limitation of Infrastructure
<p>Parking and Access Facilities</p> <ul style="list-style-type: none"> Capacity is around 60 cars; the arena closest to the road is used for extra parking space <p>Building Structures</p> <ul style="list-style-type: none"> Club house Three sheds for storage New toilet block. <p>Arenas</p> <ul style="list-style-type: none"> There are six arenas, each approximately 30 m by 70 m The biggest arena is the only one that allows show jumping. Two arenas these are used for warmups and training, occasionally for parking 	<ul style="list-style-type: none"> Main challenge is maintaining the surfaces as this is very expensive, to do properly it can cost millions of dollars. The focus from fundraising has been to keep them in good order Arenas that are oval are difficult to use because dressage is done in a rectangular arena and therefore there is wasted space and corners that are not big enough. Need more storage space as some equipment is kept outside

Eltham

Located in Eltham Lower Park, the site is used by the Adult Riding Club and The Pony Club. The Adult Riding Club has ten members with rallies being held every Tuesday and one Saturday a month. The Pony Club holds a rally once per month. Current facilities and limitations are described in Table 10 below.

Table 10 Eltham Existing Infrastructure and Limitations

Existing Infrastructure	Limitation of Infrastructure
<p>Parking and Access Facilities</p> <ul style="list-style-type: none"> • Ample parking nearby <p>Building Structures</p> <ul style="list-style-type: none"> • Three tin sheds. Two sheds are used for equipment storage and one as a club room • There is a mound in the middle of the sand arena that acts as a good spectator area • 20 horse yards • A portable toilet <p>Arenas</p> <ul style="list-style-type: none"> • A 60 m by 20 m arena with telegraph poles. • A large sand arena. This can be set up as three to four dressage arenas • A cross-country course. 	<ul style="list-style-type: none"> • Main challenge is maintaining the surfaces • Arenas that are oval are difficult to use because dressage is done in a rectangular arena and therefore there is wasted space and corners that are not big enough • Need more storage space as some equipment is kept outside • Club Room is currently damaged and needs to be replaced. • Cannot run a proper one-day event cross country event due to capacity constraints

Trails

Nillumbik has an extensive network of trails. Currently, there are three core trails, Green Wedge Trail, Diamond Creek Trail and Aqueduct Trail. There is also Kinglake Way Trail and smaller local trails that link to these regional trails.

Table 11 Eltham Existing Infrastructure and Limitations

Existing Infrastructure	Limitation of Infrastructure
<ul style="list-style-type: none"> • Green Wedge Trail runs from Wattle Glen to Kinglake via Kinglake National Park and is around 25 km in length. • Diamond Creek Trail runs from Eltham South at the Yarra to Hurstbridge and will be around 18 km in length once completed. This trail is currently being extended from Diamond Creek to Hurstbridge. This trail will be linked with the Green Wedge Trail. • Aqueduct Trail runs from Greensborough to Yarra Glen and is around 30 km in length. This is an important trail that will link to the Yarra Valley Loop Trail. Yarra Ranges Shire is currently working on a 40 km loop trail. There is potential to extend the Aqueduct Trail so that it links through to the Yarra Valley Trail, enabling trail users to hike, cycle or horse ride to this trail via the Aqueduct Trail. • Kinglake Way Trail which is mainly on roads from Nutfield up to Kinglake National Park • There are also local trails that link the Regional Trails 	<ul style="list-style-type: none"> • Safety concerns for on road trails due to increased traffic and drivers that are uneducated about horse safety • Trails are not maintained by council • Regional trails could be better linked with local and other regional trails

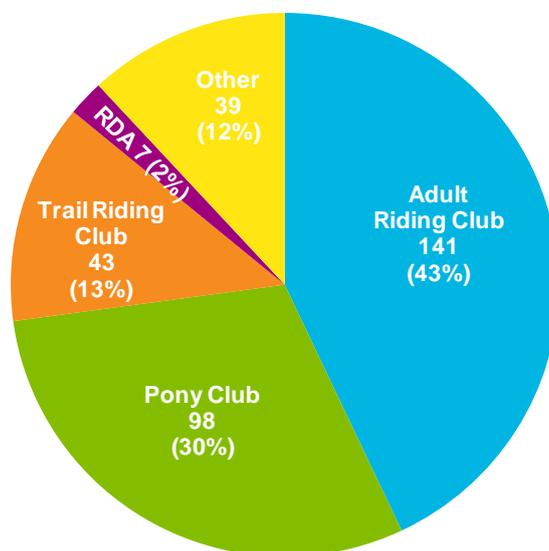
3.2.2 Survey Results

Working with Nillumbik Horse Action Group (NHAG) and Nillumbik Shire Council, an online survey targeting equine business owners and operators as well as horse riders was developed in order to gain an understanding of the regional context, identify opportunities and inform the economic analysis. The survey included questions about the characteristics of equine related businesses, including business size (turnover and number of employees), expenses, business location, customer base etc. It also asked horse riders about different disciplines they attend and location. There were also questions targeting gaps and opportunities. Survey participants were asked about their initial expenditure within and outside of Nillumbik. Initial expenditure data from within Nillumbik was then used to inform the economic analysis below.

89 percent of survey respondents were female with most being above 31 years of age. Most respondents did not own an equine related business. Of the respondents that did own an equine related business, 28 percent had businesses that offered horse riding/training lessons with the next most common being agistment and equine services. Other business types included equipment, veterinary services, equine therapy and breeding services. Most were small businesses with 42 percent earning less than \$20,000 in FY2017-18 and only 13 percent earning more than \$100,000. Of this revenue, 46 percent stated that 81 to 100 percent was related to the equine sector. Business confidence in the equine sector seems positive with 47 percent of survey respondents saying they are expecting a growth in revenue, 40 percent expecting revenue to stay stable and only 13 percent expecting revenue to decline.

93 percent of survey respondents kept less than five horses on their property with only three percent keeping over 20 horses. As seen in Figure 6, 60 percent of respondents are part of an adult riding club with the next most common being pony clubs.

Figure 6 Percentage membership in clubs or associations



The survey asked questions around sentiment and whether respondents believed demand for different disciplines was increasing, steady or declining. Most believed that the demand for equine sectors was growing (55 percent) with only 10 percent believing the sector was in decline. Of the disciplines, confidence was highest in horsemanship and trail riding with 78 percent believing there will be an increase in demand for horsemanship and 67 percent believing there will be an increase in demand for trail riding. The lowest confidence was in endurance and showing with only 19 and 18 percent believing there will be growth respectively.

Figure 7 shows the sentiment towards demand of the other disciplines.

Figure 7 Demand by discipline

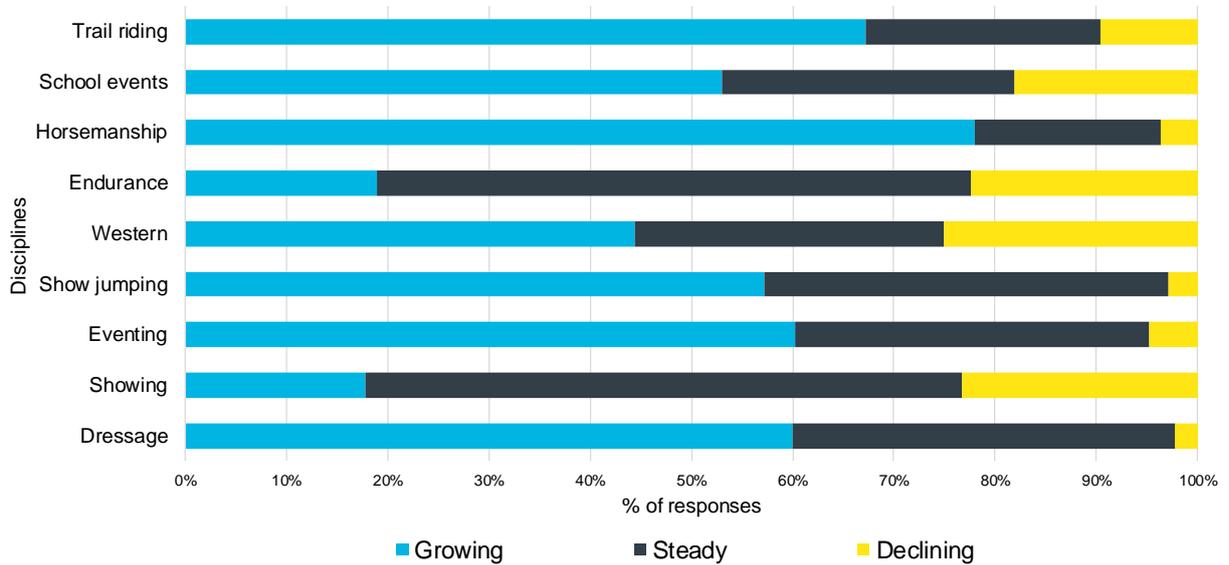


Figure 8 shows the most popular disciplines and where they are attended in Nillumbik. The most popular discipline was dressage with 209 responses with the next most popular being trail riding and eventing with 179 and 140 responses respectively. Hurstbridge was the most popular location for dressage with the next most popular grounds being Kangaroo Grounds and Yarrambat. Trail Riding is done in a wide variety of different locations with the majority using local trails. A summary of Nillumbik’s position on the different disciplines and the survey results can be seen in Table 12.

Figure 8 Discipline attendance in Nillumbik

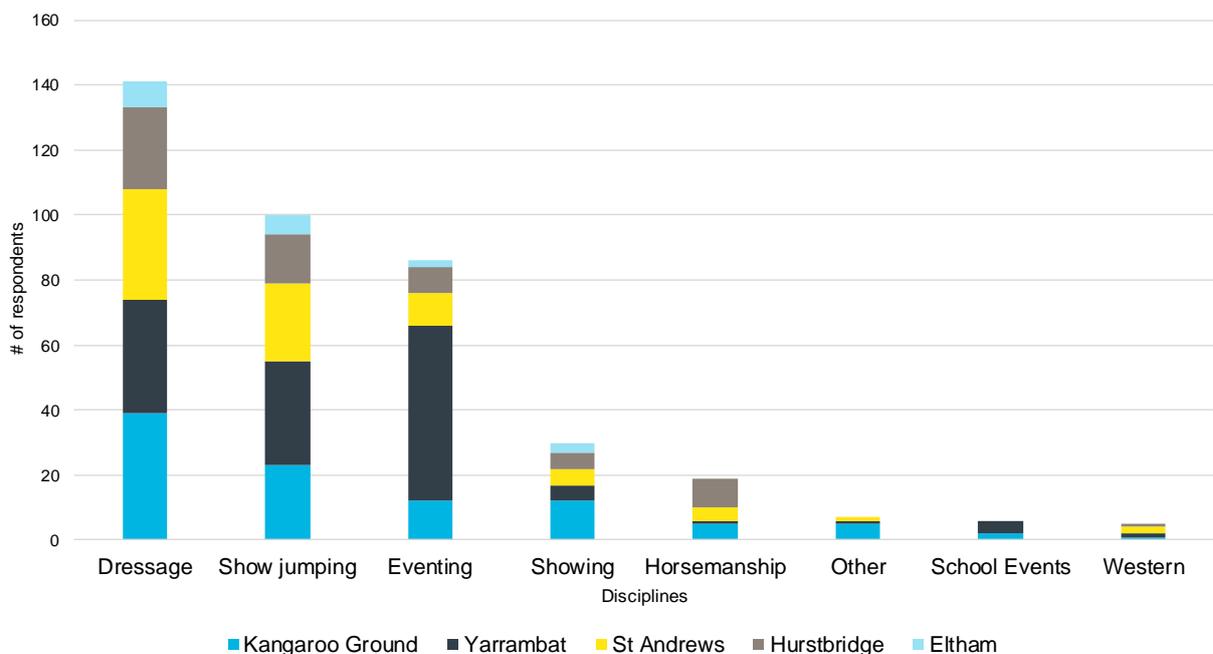


Table 12 Nillumbik's position

Discipline	Nillumbik's position
Show jumping	<p>Show jumping facilities in Nillumbik are small and not suitable for large-scale or high-level competition. Horse and pony clubs in Eltham, Hurstbridge, St Andrews and Yarrambat have one or two dedicated or multipurpose show jumping rings. According to survey findings, the most popular facilities for show jumping are Yarrambat, St Andrews and Hurstbridge.</p> <p>Arenas at regional agricultural shows and Boneo Park, Gladysdale and Shepparton Equestrian Centres are commonly used for state and national events.</p>
Dressage	<p>Nearly all horse and pony clubs in Nillumbik offer dressage. Kangaroo Ground Pony Club (which owns its facilities) has 6 multi-use outdoor arenas, Hurstbridge Pony Club has 5, while most clubs have at least two.</p> <p>Classical Riding Lessons in Panton Hill specialises in dressage lessons. Whittlesea Plenty Valley Dressage Club (based at Yarrambat) also runs lessons and dressage competitions, such as Spring Dressage Day and Winter Series. National and state-level championships are generally held at Boneo Park and Werribee Park NEC. The survey found that the most popular facilities used are Hurstbridge, Kangaroo Grounds and Yarrambat.</p>
Eventing	<p>Though most pony clubs have facilities for the three eventing disciplines, St Andrews Pony Club is the only club in Nillumbik which officially states it can facilitate one-day eventing however the survey found that the most popular facility used was Yarrambat.</p> <p>Events in Victoria are usually held by pony clubs and eventing associations. FEI events are generally held at Werribee Park NEC. There is growth in interschool and grassroots-level competitions.</p>
Endurance riding	<p>Endurance riding is based on controlled long-distance races. The races are often conducted in rural areas. Survey respondents use Yarra Valley, Kangaroo Grounds, Lancefield and Kilmore for this discipline.</p>
Cross-country	<p>Most horse and pony clubs in Nillumbik offer cross country riding, however the quality of infrastructure varies. Yarrambat is the only facility that has a cross-country course that is suitable for events. Outside competitions, however, access to Yarrambat cross-country course is limited to its members and their guests</p>
Trail riding	<p>Trail riding is offered by horse and pony clubs in St Andrews and Kangaroo Ground, however trails are limited to the club's property. St Andrews Trail Riding Group offers recreational trail riding for all ages around the Yan Yean Reservoir.</p> <p>Warrandyte State Park (bordering Nillumbik, in Manningham Council) has several horse trails which are owned and managed by Parks Victoria.</p> <p>Council acknowledges that east-west trail links across Nillumbik are poor, however there is opportunity to extend into areas such as Hurstbridge, Whittlesea and Plenty Gorge Parklands. Trail expansion may attract more equine recreation users.</p> <p>The survey found that the most popular location for trail riding were Local trails with 47 users, the next most popular were St Andrews and Panton Hill with 19 users each.</p>
Riding for the disabled	<p>Riding Develops Abilities (RDA) is a volunteer-run organisation that partners with centres and has specialised instructors to encourage riders with disability. In Nillumbik, RDA has partnerships with St Andrews Pony Club. Eltham also provides support for riders with disabilities. Nearby RDA centres include RDA Bundoora Park, Viewbank and Warrandyte. Waiting lists lengths vary, but typically range from 1 to 3 years.</p>

4.0 Economic impact analysis

Equestrian activities traditionally require significant time and capital investment from owners, due to the effort and costs associated with upholding and training a horse, the challenge of transporting the animal to and from events, and event registration fees. A 2016 study commissioned by EA found that the equestrian sector (excluding all codes of horse racing, polo/polocrosse, rodeo, western and tent pegging) contributes around \$1.143 billion to the Australian economy each year⁵. Apportioning this benefit to Nillumbik based on relative population implies that the equestrian sector contributes nearly \$3 million to the region each year. However, Nillumbik's position as a green wedge municipality provides a supply of equestrian infrastructure and open space in close proximity to a significant population, which suggests potential that the equestrian sector contributes appreciably more than this amount to the Nillumbik region year. As such, economic impact analysis was undertaken to evaluate the Nillumbik's unique equine sector.

4.1 Methodology

The value of impacts on Nillumbik's economy has been assessed using Input-Output (I-O) analysis, which is based on national output and employment multipliers calculated from the 2012/13 System of National Accounts Input-Output Multipliers released by the Australian Bureau of Statistics (ABS 2013). 2012/13 is the most recent year for which output and employment data were published by the ABS.

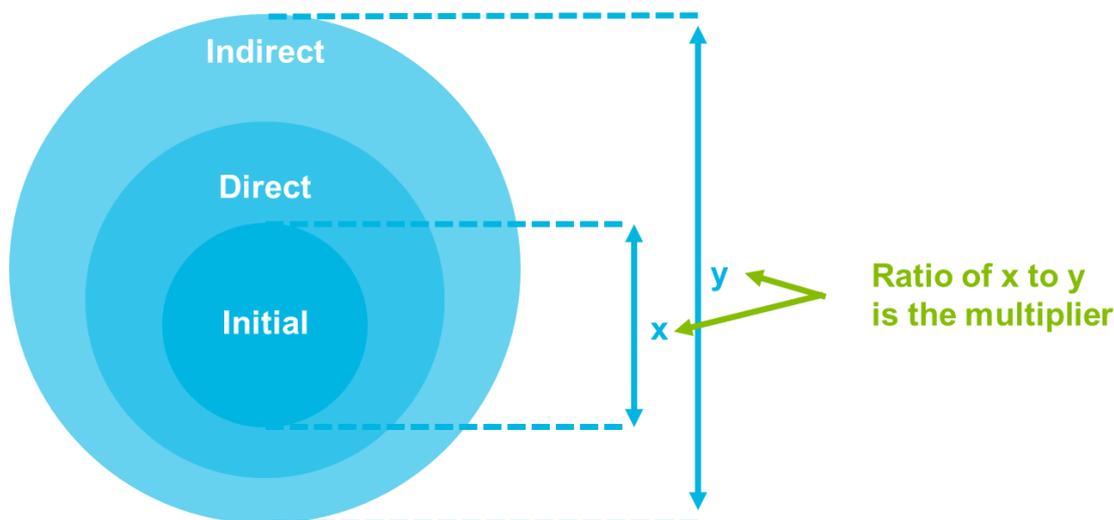
I-O models capture the transactions that link industry sectors across the economy in a simplified form. The impact of the project can be measured in several different ways. For the purpose of this assessment, the following types of impacts are considered:

- **Initial** spend, which is the actual value of goods and services purchased
- The **direct** multiplier effect represents the increase in economic activity (value added) and employment which is directly generated in the industry or sector receiving the initial impact. The direct effect includes initial spend
- The **indirect** multiplier effects represent the flow-on impacts that occur from all secondary industries in the economy to support the direct impact and changes in consumption by the household sector in response to income changes resulting from the direct and indirect impacts.

The total multiplier effect is the sum of the direct and indirect multiplier effects outlined above.

A high-level overview of I-O analysis is provided in Figure 9.

Figure 9 Overview of I-O analysis



⁵ <http://www.equestrian.org.au/news/equestrian-brings-more-1billion-economy>

Initial expenditure data was captured through a public survey, which was promoted by Council and Nillumbik equine organisations and completed by 426 participants on behalf of themselves and/or their families. Initial expenditure data from the survey was considered to encapsulate all spending within Nillumbik. That is, expenditure data was not scaled up to a broader population.

Expenditure within Nillumbik and the corresponding industry multipliers used in the economic analysis are outlined in Table 13.

Table 13 Industry multipliers used in economic impact analysis

Category	Initial expenditure	Industry multiplier(s) used	Direct multiplier	Indirect multiplier
Agistment	\$134,020	Other Agriculture	1.72	2.67
Hoof care	\$452,346	Health Care Services	1.40	3.91
Vet & health services	\$382,420	Health Care Services	1.40	3.91
Feed & supplements	\$1,401,110	Other Agriculture	1.72	2.67
Bedding	\$50,306	Other Agriculture	1.72	2.67
Utilities applicable to keeping the horse(s)	\$161,925	Electricity Transmission, Distribution, On Selling and Electricity Market Operation; Gas Supply; Water Supply, Sewerage and Drainage Services	2.01	3.10
Lessons & training	\$389,950	Other Services	1.21	3.93
Equine insurance	\$39,079	Auxiliary Finance and Insurance Services	1.82	4.24
Association & events registration fees	\$161,485	Other Services	1.21	3.93
Transport costs & maintenance	\$282,630	Motor Vehicles and Parts; Petroleum and Coal Product Manufacturing	1.71	2.71
Riding apparel	\$116,595	Retail trade	1.71	3.73
Stabling	\$15,100	Other Agriculture	1.72	2.67
Property infrastructure	\$592,650	Residential Building Construction	2.53	4.10
Property maintenance	\$499,700	Other Agriculture	1.72	2.67
Horse equipment / tack	\$270,580	Retail trade	1.71	3.73
Other	\$117,250	Other Agriculture	1.72	2.67
Total	\$5,067,146			

4.1.1 Limitations and exclusions of I-O models

I-O models are a simple representation of the economy. Limitations and exclusions that apply to the I-O model developed for this project are outlined below:

- **Application of framework to local government areas (LGA).** I-O multipliers calculated from ABS tables are based upon nationwide analysis. This means that structural differences in sectors across Australia are not captured in the multipliers as they are averaged out. Unique characteristics of Nillumbik's economy, such as relative economies of scale, may generate different I-O multipliers. As such, application of ABS I-O multipliers to a single LGA is an exercise in approximation.
- **Impact of time.** 2012/13 is the most recent year that ABS has provided corresponding employment data. Structural changes to the economy since this time, such as changes to the proportion or value of imports and exports, the price of goods and efficiencies in production, are not captured within the analysis.

- **Location of impact.** The study assumes that the economic impact occurs within the Nillumbik, when in reality a lot of the impacts may occur in adjoining LGAs or other parts of Victoria and Australia.
- **Population captured within modelling.** The study only assesses costs of horse owners and riders that completed the survey. It excludes horse owners and riders that did not complete the survey, as well as spending from non-horse owners and riders that may be indirectly involved in the sector through training, coaching or attending equestrian events.
- **Focus on monetary impacts only.** The economic impact analysis focussed on quantifiable monetary impacts only, and does not consider other impacts, such as social opportunities and outcomes that include potential for lifelong participation and development of valued personal qualities such as demonstrated responsibility that is associated with taking care of the horse/s.
- **Exclusion of volunteering.** A unique and important characteristic of the equine sector is volunteering to maintain facilities and run events. Any economic impact associated with these volunteer hours have been excluded from the analysis.
- **Labour substitution.** Indirect impacts are based on the notion that household expenditure is supported by employment within the equine sector. It is likely, however, that jobs are transferrable from the equine industry to other sectors, and as such the indirect impact would likely occur, even if jobs within the equine sector reduced.

The combination of assumptions used and the excluded interdependence within I-O models means that I-O multipliers tend to overstate the impact of final demand.

4.2 Findings

The economic impact analysis identifies that the Nillumbik equine industry contributes significant direct and indirect economic impacts for the regional economy and, more broadly, the state and national economies.

Total economic impact = \$16.9m



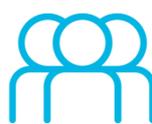
\$5.1m

**Initial
spend**



\$8.9m

**Direct
impact**



24

**FTE jobs
supported**



\$8.0m

**Indirect
impact**

The 426 survey respondents reported initial total spending of around \$5.1 million for themselves and their families. This equates to spending of nearly \$12,000 per respondent/family each year on final outputs.

The demand for final outputs depends on inputs from other industries and is considered to be a driving cause of production of these inputs. That is, final outputs have 'backwards linkages' to the industries supplying its inputs. These backwards linkages generate an additional \$3.8 million of benefit to derive a total direct impact of around \$8.9 million.

The flow-on impacts or indirect impacts are 'forwards linkages' within the economy. These benefits provide an additional \$8.0 million in benefits each year to generate a total economic benefit of \$16.9 million per annum to the Nillumbik region each year.

The industry also supports 24 Full Time Equivalent (FTE) jobs. These jobs are likely to be in industries that benefit the most (refer Table 13), which includes health care services, other agriculture (feed and supplements, property maintenance) and building/construction.

5.0 Opportunity assessment

Building on desktop research and stakeholder consultations (workshop, interviews and survey), this section describes key characteristics of the opportunities identified and assesses the key strengths, risks and constraints associated with each option.

The research, survey and consultations concluded that there are various gaps in facility provision, which may be addressed to take advantage of market opportunities. These are:

- Indoor arena
- Larger arena
- Improved access to trails and improved connectivity between trails

Stakeholder consultation undertaken to inform development of the *Equestrian State Facility Plan* found that the equine infrastructure gaps in east Victoria are dressage and reining facilities. The priorities of stakeholders were:

- More venues with six good quality sand arenas
- Better quality of sand arenas within existing venues
- Improved access to well-built cross-country courses
- More venues with large number of stables (300+)
- Better disability access
- Improved shade and accommodation facilities

5.1 Indoor arena

Construction of a mixed-use indoor arena in Nillumbik would increase participation in equine activities. Currently, there are no indoor arenas in Nillumbik with most stakeholders believing there is strong demand and opportunity for a multipurpose venue that could be fully utilised by various groups within the local community as well as for larger events that attract competitors from around Victoria and Australia. This facility would increase participation from local riders as well as those from outside Nillumbik, as it would allow clinics and events to run during inclement weather as well as throughout the evening and night time due to better lighting conditions. The surface would also be easier to maintain as it would be protected from outside conditions. Additionally, the facility would be beneficial for riders with disability who may be more sensitive to weather and lighting conditions. An indoor arena aligns with the *Equestrian State Facility Plan* priorities of better disability access and improved shade.

Discussions with stakeholders and research conducted has determined that, ideally, a facility should be multiuse and cater for various disciplines such as show jumping, dressage, eventing and cross country, to enable a horse-riding club to offer the diversity of experience expected of members and participants. Some possible sites identified for this arena were Kangaroo Ground old tip site and tip site on Yan Yean Road that is due to close. Ease of access for horse trucks and floats has been raised as important when selecting a site, as access constraints have previously limited growth of equestrian clubs within Nillumbik. The following facility components and areas are considered necessary for a standard facility to cater for the desired equestrian activities:

- Ample parking for cars and floats
- Multiuse arena measuring at least 60 m by 25 m that is suitable for different disciplines
- Infrastructure supporting riders with disabilities
- Spectator seats
- Toilets (showers and change rooms are not considered necessary, but would be ideal)
- Yards, wash bays and facilities for horses to stay overnight

- Catering facilities

It is important that this arena would be planned as a long term and permanent venue, noting concerns that the site could be sold if solely privately owned. The arena should be available for hire to all clubs within and outside Nillumbik. There is an option to place a roof over an existing facility, however, choosing a facility and negotiating a way for usage so that all clubs can benefit equally may be an issue.

5.2 Larger arena

Another opportunity identified was the need for a larger arena and cross-country course. Most horse and pony clubs in Nillumbik offer cross-country riding, however, the quality of infrastructure varies. This arena has the potential to be multiuse and used by riders with disabilities. Having a larger equestrian facility in Nillumbik would increase participation and attract more equestrian interest from around Victoria.

There is desire for a large cross-country course to be developed that all clubs could hire. Yarrambat is the only facility within Nillumbik that contains a suitably sized cross-country course, but this is only available to Yarrambat members and their guests. The Hurstbridge and Kangaroo Grounds facilities have smaller courses. Currently, Hurstbridge hires facilities at Wandin and Yarra Glen to hold its cross country training. Stakeholder consultation findings suggest that local clubs could make good use of the facilities, as well as schools for inter-school equestrian events as well as other outdoor events.

A larger arena could be utilised by most disciplines and used to hold more competitions in Nillumbik. Interscholar Equestrian is one of the fastest growing sports in Victoria with competitors, supporters, coaches, officials, judges and volunteers estimated in the thousands⁶. A large arena could be used to conduct a series of dressage, show jumping, and combined training events run by these schools. Due to the increase in visitor numbers, local businesses may also benefit.

The following facility components and areas are considered necessary for a large arena to cater for the desired equestrian activities:

- Ample parking and access
- Multiuse surface that can be used for various disciplines
- Competition standard arena and cross-country course
- The ability for the arena to be hired by any club
- Disability access.

There is potential to co-locate a larger outdoor arena and cross-country course on a site with the indoor arena discussed in section 5.1. This may enable either or both facilities to be used by a broader range of equestrian disciplines and event sizes, enhancing overall utilisation of the facilities.

5.3 Access to and improved connectivity for trails on public land

Nillumbik has an extensive network of trails with some core regional trails and various local trails. As trail riding does not require specific activity areas like some other equestrian disciplines, facility requirements of recreational, trail and endurance riders include:

- Safe and ready access to trails and shared paths also used by walkers and bikers
- Ample secure and readily accessible parking areas for unloading horses and for leaving horse floats (ideally located at the start and/or end of trails, potentially also located near local cafes and amenities)
- Shaded tie-up rails and watering areas that are secure and safe for horses (ideally located close to parking areas)
- Cautionary signage to motorists along roads where appropriate.

⁶ Equestrian Victoria

The following issues were raised as needing to be addressed to enhance the amenity, capacity and safety of trails within Nillumbik.

Rider, horse and road users' safety

A concern raised in stakeholder consultation was about on-road trails and road safety. Unlike passengers in vehicles, riders are unrestrained. They can be hit by vehicles moving at high speeds, and/or thrown into oncoming traffic, jeopardising their own safety and that of other road users. The sudden or close passing of a vehicle may trigger a horse's dangerous flight response, causing it to bolt blindly forward or veer into traffic. This was the main cause of 17 horse accidents in the United Kingdom in 2011⁷. Other contributing factors include vehicle speed, low visibility and mutual misunderstanding. Due to urbanisation, traffic around the area has increased significantly with more drivers being unaware of horse safety. This was consistently highlighted in consultation with some trail riders giving anecdotes of safety related incidents. In particular, urban sprawl and increased traffic volumes coupled with deterioration of road side verges was highlighted as key concerns that may dissuade some participation in trail riding. More off-road and better-connected trails would increase participation and make trails safer for not just horse riders but drivers, pedestrians and bike riders as well. The trail riding community stated a willingness to contribute to the maintenance of trails and share them with pedestrians and bike riders.

A horse safety campaign conducted through various media outlets and better road signage could raise awareness and make roads safer for both riders and drivers. The British Horse Society has launched safety campaigns in Great Britain and Ireland and have a three-part road riding awareness course which is taken by about 4,000 people each year⁸. The British Horse Society's *Dead or Dead Slow?* campaign has made road safety education videos and other materials to inform drivers of their responsibilities on the road and how to pass horses safely. A similar approach could be used in Nillumbik with educational horse safety announcements and videos being shared on media channels such as television, radio and social media.

Signage in Australia with respect to horse riders is limited. Usually signs contain a simple black horse and rider silhouette with a yellow background. Making this current signage for horses on roads more informative for drivers could be a positive step forward for horse, rider and driver safety. This can be done by providing instructions on how the horse needs to be treated when approaching and passing. One simple addition to the signage could be the phrase "pass wide and slow"⁹. Similarly, a diagram showing a buffer zone around the horse for passing drivers should help drivers react more appropriately when passing a horse. The location of these signs may also be reviewed with more signs being placed on roads frequented by horse riders.

Connectivity and promotion

Stakeholder consultation suggested that Nillumbik Shire Council has not been effectively promoting its shared trails to wider networks, possibly due to trails being incomplete and not consistently maintained. The trails have historically not had a maintenance program and there are no trail inspections. There is an opportunity to increase visitation numbers once trails are fully mapped and graded in terms of the experience, distance, location, degree of difficulty etc. The more that trails are linked to one another, the more they will be utilised. Nillumbik Shire Council is currently investigating development of a mobile application that will provide information on trails within Nillumbik. This will help grow visitation numbers and keep locals updated. The quote below from a survey respondent shows why connectivity is important and the way it could benefit horse riders, bike riders and walkers.

'Many years ago, members would ride to club grounds but with the development in the area and a lack of connecting trails mean members have to transport their horses even a short distance. Connective trails would be very much appreciated by horse riders, walkers and bike riders.'

⁷ Inroads into Equestrian Safety: Rider-Reported Factors Contributing to Horse-Related Accidents and Near Misses on Australian Roads, Kirrilly Thompson and Chelsea Matthews 2015

⁸ British Horse Society

⁹ Inroads into Equestrian Safety: Rider-Reported Factors Contributing to Horse-Related Accidents and Near Misses on Australian Roads, Kirrilly Thompson and Chelsea Matthews 2015

Better connected trails will allow more long-distance riding and may attract events like endurance riding. This means participants and family members will need to stay over a weekend which could be leveraged with homestays and B&Bs accommodating visitors overnight and adding to the local economy. The Diamond Creek Trial is currently being extended from Diamond Creek to Hurstbridge. This trail will be linked to the Green Wedge Trail. This is an important feature as linkages between regional and local trails will increase the way in which the trail can be utilised and attract more experienced riders.

6.0 Conclusion

This report has been undertaken to conduct an economic analysis of and determine existing opportunities in the equine industry within the Nillumbik.

Nillumbik is located within a green wedge with beautiful open spaces and natural environment. This compliments the creation of trails and makes it an ideal environment for equestrian activity in close proximity to significant population. There are five equestrian clubs within Nillumbik varying in size and facilities. Through I-O analysis and stakeholder engagement it has been identified that the equine sector contributes \$16.9 million per annum to Nillumbik's economy and supports 24 fulltime equivalent jobs.

Opportunities identified included the building of an indoor or larger arena and improving and connecting established trails. Investing in an indoor arena will provide many benefits by allowing events and rallies to be run in all weather conditions and supporting riders with disabilities that may be more sensitive to light and weather conditions. This will increase participation and may attract more visitors from outside of Nillumbik. A larger arena will be able to support a variety of competitions and take advantage of the growth in inter school competitions. These arenas will be able to be hired by all clubs within and outside of Nillumbik. Improving and connecting trails would be beneficial for not just horse riders but also bikers and walkers as well. Through consultation it was found that most trails riders do not feel safe riding on roads due to the increase in traffic and drivers uneducated about horse safety. More off-road and better-connected trials would reduce the need to ride on the road and reduce the likelihood of accidents.