

APPENDIX 5: VISITOR ECONOMY PROFILE

2018 data from Tourism Research Australia detailing visitation and expenditure statistics for the Bega Valley Local Government Area are displayed below.

	International visitors	Domestic overnight visitors	Domestic day visitors	Totals
Visitors ('000)	30	490	370	891
Nights ('000)	181	1,979	-	2,160
Average stay (nights)	6	4	-	4
Spend (\$m)	11	317	53	380
Average spend per trip (\$)	352	646	143	152
Average spend per night (\$)	58	160	-	160

Source: Tourism Research Australia, Local Government Area Profiles, 2018. Data is based on a four year average from 2015 to 2018.

Tourism Research Australia also publishes the number of tourism business within a Local Government Area. For the Bega Valley Shire there were 522 tourism business most of which employed between 1 to 4 people.

Tourism businesses	Number businesses TRA estimate 2018
Non-employing	177
1 to 4 employees	208
5 to 19 employees	120
20 or more employees	16
Total	522

Source: Tourism Research Australia, Local Government Area Profiles, 2017. Data is perturbed for confidentiality purposes and totals may not add as a result.

Employment in the Visitor Economy

The estimates of the 2018-19 visitor economy employment by the National Economics Institute of Economic Industry Research (NIEIR) as presented on the Bega Valley Shire economic profiling tool are summarised as follows:

- Total of visitor and hospitality sales in the Bega Valley Shire in 2018-19 = \$274.7M
- There was a small increase on the 2017-18 sales levels of around 1.7%
- Direct full time equivalent jobs in the tourism sector were estimated at 777 jobs
- Indirect full time equivalent jobs were estimated at 528 jobs

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Visitation increases from Eden cruise ships

Visitation from cruise ship passengers to Eden is expected to increase in future years. The table below details current projections from financial year 2017-18 to 2021-22.

Year	2017-18	2018-19	2019-20	2020-21	2021-22
Passengers	25,796	20,458	32,306	33,058	50,745

Source: Port Authority

Using the 2017-18 financial year as the base year, a compound annual growth rate of 18.4% was calculated and applied up to financial year 2025/26 after which a 10% growth rate was applied based on cruise ship passenger projections and advice supplied by the Port Authority. To model the increase in visitation from cruise ships over 10 years, these rates have been applied from 2020-21 to 2029-30.

Year	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Passengers	33,058	50,745	60,097	71,173	84,290	99,824	109,806	120,787	132,865	146,152

Assuming the number of passengers in financial year 2017-18 of 25,796 is included in the Tourism Research Australia statistics, passenger numbers over and above this rate have been calculated to understand the total increase in visitation to the Bega Valley Shire over a 10 year period from financial year 2020-21 to 2029-30.

Year	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Passengers	7,262	24,949	34,301	45,377	58,494	74,028	84,010	94,991	107,069	120,356

Based on this analysis, and an expenditure of \$143 per trip for domestic day trip visitors (on the assumption cruise liners will spend in accordance with domestic day trippers), this increased visitation translates to **\$93,069,658** additional expenditure in the tourism sector in the Bega Valley Shire over 10 years.