

Economic Value of the Manly Freshwater Class Ferry

Northern Beaches Council's draft Destination Management Plan details the importance of tourism to the Northern Beaches economy, with visitor spend estimated to generate **over \$500 million** in 2018 and account for **12% of all jobs** across the Northern Beaches. Manly is identified as a tourism gateway to the Northern Beaches and the Freshwater Class Ferry is a vital service to support the Northern Beaches visitor economy.

Northern Beaches 2020 Visitor Survey:

- Based on the 2020 Northern Beaches Visitor Survey, the Manly Freshwater Class Ferry was identified as the primary mode of transport to Manly, accounting for 52% of visitor, compared to 13% for the Manly Fast Ferry.
- The 2020 Visitor Survey also found that 'catching the ferry' was the 4th top most cited activity for things to do (38%), after visit the beach (94%), (eat at a restaurant or café (64%) and go for a walk (61%).

Destination NSW Manly Visitor Profile for the Year End December 2019

Whilst there is no data on mode of travel and relative importance of the Manly Freshwater Class Ferry, it does include some valuable statistics on the profile of visitors to Manly.

- This identifies 2.8 million visitors to Manly during 2019 (up 16.4% from 2018).
- This includes 1.1 million domestic and 1 million international overnight visitors who stay overnight in Manly or stayed overnight elsewhere in NSW but visited Manly during their stay, as well as 700,000 domestic day trip visitors to Manly, who stay at least four hours and travelled at least 50 km roundtrip.
- Of the domestic overnight visitors approximately 172,800 (16%) stayed in Manly itself and for international overnight visitors, this figure was 45,100 (4%).
- For domestic overnight visitor primary purpose for visit was Visiting Friends and Family (42%), whilst for international overnight the primary purpose was 'Holiday' (61%)

Manly Ferry Statistics

Below are some statistics from Transport for NSW showing monthly Manly Freshwater Class Ferry patronage, which covers a range of users (resident commuters to the City, as well as tourists to Manly). It shows a marked drop in patronage from March 2020, following the lockdown from COVID-19 which began mid-March, with some increase in patronage from June as travel bans lifted and some commuting returned, though still significantly below patronage levels in 2019.

2019		2020 - COVID impact from mid March	
Jan	540,348	Jan	483,716
Feb	370,349	Feb	304,278
Mar	378,321	Mar	190,320
Apr	399,332	Apr	23,547
May	298,287	May	49,347
Jun	288,135	Jun	98,343
Jul	319,482	Jul	108,456
Aug	294,499	Aug	87,731
Sep	324,813	Sep	108,218
Oct	393,168	Oct	146,968
Nov	354,789		
Dec	468,437		
Total	4,429,960		

Note: From the 6 July 2020, there was a change in Opal fares. This saw the removal of \$2.50 unlimited Sunday fare. Instead a new \$8.05 all-day travel cap on Saturday, Sundays and public holidays was introduced. \$2.80 unlimited daily travel for Senior/Pensions Opal card holders still applies

2019 Celebration Days

New Years Day	65,043
Australia Day	80,591
Easter Long Weekend	257,960 (4 days)
Anzac Day	51,584
Christmas Day	38,586
Boxing Day	44,767