BYRON SHIRE COUNCIL
TOURISM NEW SOUTH WALES

BYRON SHIRE TOURISM MANAGEMENT

AN OPTIONS PAPER FOR CONSIDERATION

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1.0 INTRODUCTION

This Options Paper has been prepared for consideration by the Reference Group and as the foundation for the final report to Council.

The project has been commissioned jointly by Tourism New South Wales and Byron Shire Council with funding provided by Tourism New South Wales.

1.1 PROJECT AIM

The aim of the project is to provide guidance and assistance to Byron Shire Council in balancing the management of tourism and its impact on the community in Byron Shire, in the face of rapidly increasing visitation pressures on infrastructure and the community.

In addition the project seeks to consider options which can achieve a sustainable balance between the community living in Byron and the visitors who have the privilege of visiting the community.

1.2 SCOPE AND LIMITATIONS

While the study covers Byron Shire, the primary focus was on Byron Bay.

The project should be regarded as an initial examination of key issues as the precursor to a recommended in-depth shire-wide tourism planning study.

Tourism research data for the Shire is extremely limited and was a major constraint in attempting to provide current and projected estimates of visitor numbers.

1.3 STUDY TEAM

- Rob Tonge : Rob Tonge & Associates (Project Co-ordinator)
- Stephen Fletcher : Stephen Fletcher & Associates
- Elisa Backer : Concept Tourism Consultants

2.0 SITUATION ANALYSIS

Byron Shire has achieved tourism icon status as one of the highest profile destinations in Australia, and is well known domestically and internationally. For many travellers Byron Bay is a 'must see' inclusion in itineraries, particularly for the backpacker market.

Although the primary focus is Byron Bay, the Shire offers a range of products and experiences including:

- High scenic values and natural beauty;
- Picturesque villages; and
- Alternative and relaxed lifestyle.

The commercial accommodation segment includes the key accommodation types of hotels/motels, resorts, caravan and camping parks, B&B establishments, hostels/backpacker accommodation and holiday flats/units.

Data to enable a definitive breakdown of accommodation types within the commercial accommodation segment is not available and such research is beyond the scope of this project.

The last major publication to review accommodation capacity was the ABS Survey of Tourist Accommodation (1997) prior to the change in scope. More comprehensive data should also be available soon through the State Tourism Data Warehouse, although inevitably some "accommodation" may be omitted.

The absence of such data creates difficulty in the development of specific strategies and actions for each accommodation type. However, issues, in particular social impacts and infrastructure problems associated with the various forms of commercial accommodation, have been the subject of much discussion and can be relied on, in part, to figure in developing strategies.

Byron Bay, and to a lesser extent the adjoining areas of Suffolk Park and Belongil, are currently faced with extremely high and unprecedented tourist numbers.

Our modelling provides an estimate of 1.75 million visitors within Byron Shire per year (2001). Our estimates, see below, were arrived at independently by the design of a specific model, please see section 5, which drew information from a wide range of sources, which are listed at the end of the document.

Tourism New South Wales' estimates, also see below, of 1.2million visitors, which became available during the later stages of compiling this paper, are somewhat lower, but still highlight the substantial numbers of people visiting the Local Government Area.

Please note that in general, the actions, controls, implementations and recommendations are based upon our visitation estimates.

***Table 1* :**

Consultant's Estimated Visitation – Byron Shire - 2002

MARKET SEGMENT	**NUMBER OF VISITORS**	**% (Rounded)**
Visitors staying in commercial Accommodation	1,014,240	58%
VFRs	158,370	9%
Day trippers	580,000	33%
Total	**1,752,610**	**100%**

Tourism New South Wales' Estimated Visitation – Byron Shire - 2002

ORIGIN	**NUMBERS OF VISITORS**		**NIGHTS**
	Overnight	Day trips	
Domestic	473,000	581,000	2,044,000
International	100,000	50,000	600,000
Subtotal	**573,000**	**631,000**	**2,644,000**
Total	**1,204,000**		

The efforts involved in arriving at these estimates have highlighted the lack of up-to-date base data on the Shire's tourism industry.

We advise that this issue should be addressed as a matter of priority and in particular as part of the proposed extensive research and strategy project. A first step in this process is the release by Tourism New South Wales of estimates of visitation to Local Government Areas for the period 1998 – 2001.

However it can be safely assumed that visitation falls within these two figures of 1.75 million and 1.2 million.

Due to the difficulty in predicting future economic conditions and tourism trends, in accordance with the brief, based on our estimates, we have developed three scenarios for consideration. Potential low, medium and high-growth scenarios are as follows:

***Table 2* : Consultant's Projected Growth in Visitation 2007 - 2012**

	2007	***2012***
Low-Growth Scenario	2,019,619	2,327,404
Medium-Growth Scenario	2,116,518	2,594,972
High-Growth Scenario	2,279,190	2,893,293

Because of lack of time series data, it is stressed that the above projections are given as a very general indication only. They are based on growth rates, which are significantly higher than the most recent (November 2002) Tourism Forecasting Council forecasts, for the following main reasons:

- Upgrading of the Pacific Highway, will reducing travel time for the Brisbane and S-E Queensland market, particularly day visitors;

- Increasing traffic congestion on the Bruce Highway to the Sunshine Coast, one of the main destinations for the Brisbane market; and

- The increasing desire by city dwellers to escape the pressures of urban living. Northern Rivers and Byron Shire are seen to offer a far less commercialised venue for rejuvenation and relaxation than the traditional Gold Coast and Sunshine Coast destination areas.

Given the high level of visitation to Byron Bay, the status of Byron Shire in the State and National tourism stakes, and the expected increase resulting from upgrading of the Pacific Highway, we consider that an immediate need for in-depth tourism research to be undertaken on a shire-wide basis to refine estimates and provide a more solid foundation for future industry and shire development.

It is our independent opinion that the current trends in tourism in Byron, in particular the significant and continuing increases in visitor levels focusing on the Byron Bay township, are unsustainable and will lead to compromising the social, economic and environmental qualities of the town. This consideration is highlighted throughout the report.

The World Travel and Tourism Council (1996) defines sustainable tourism as follows:

'Sustainable tourism development can be thought as a meeting of the needs of present tourist and host regions, while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that we can fulfil economic, social and aesthetic needs while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.'

There is however, understandable scepticism in communities experiencing tourism pressures, such as Byron Bay, as to the tourism industry's commitment to sustainability.

Successful tourism destination management demands strong leadership and establishment of appropriate management policies and practices that over time, achieve a balance between the environmental, economic and social aspects and the direct impact on the community (The Triple Bottom Line concept).

Implementation of the proposed Tourism Management Plan therefore provides the opportunity for Council to become a leader in the attainment of a sustainable tourism industry.

2.1 CONSULTATION OUTCOMES

2.1.1 KEY ISSUES

Issues raised by respondents to the consultation process focused on concerns at the deterioration of Byron Bay, and the impact of tourism pressures on the community:

- Inadequate constraints on development;
- Tourism is now "controlling" Byron Bay;
- Community resistance is increasing (anti-tourism);
- Uncontrolled holiday rental in residential areas (noise/parties);
- Unauthorised rental properties;
- Increasing pressure on services, i.e. roads, sewerage, rubbish, waste water;
- Traffic congestion and parking;
- Impact on the environment – must provide for future generations;

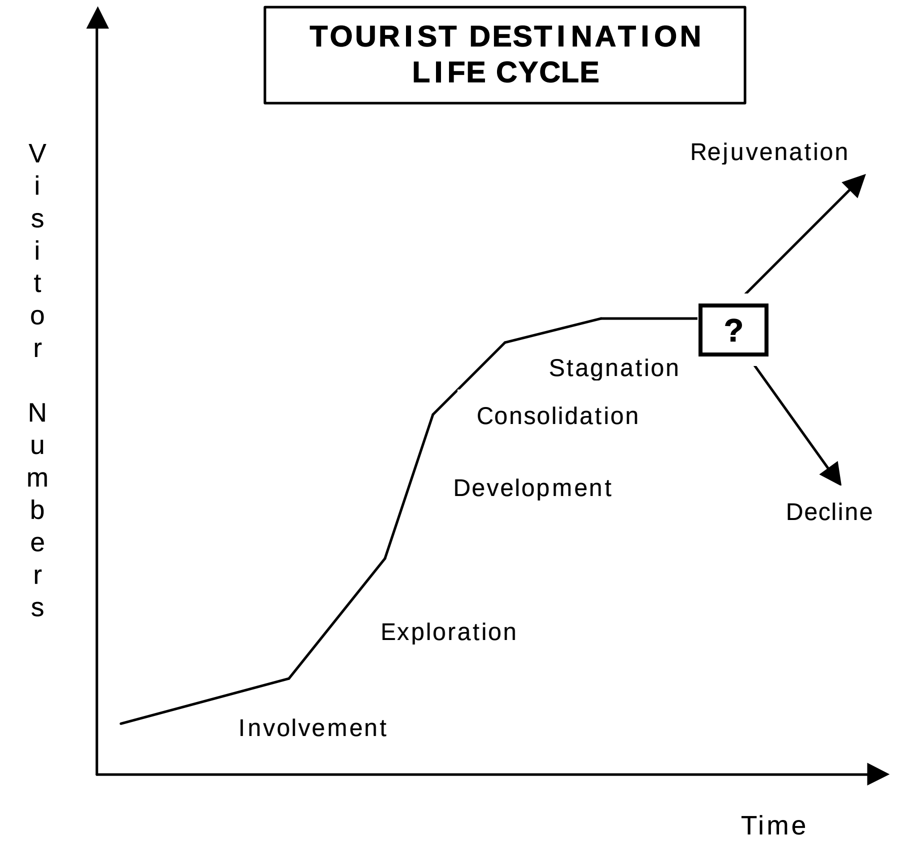
- Lack of a structured relationship between Council, the tourism industry, and the community;
- Lack of a recognition of synergies created through co-operative tourism industry efforts and initiatives;
- Planning requirements are blurred;
- Other shire towns are under increasing pressure;
- Shire is losing sense of community;
- Shire is losing its cultural identity – becoming generic and sanitised;
- Council does not demonstrate a full understanding tourism and allows commercial development without corresponding infrastructure;
- Perceived problems with planning legislation controlling tourism development arising from the consultation process with local residents; and
- Byron has become dominated by backpackers.

2.1.2 NEEDS

- Strong tourism industry leadership;
- Tourism impacts must be effectively managed;
- Priority is management, not marketing;
- Ensure better communication and improved relationships between Council, community and tourism industry;
- Ensure clear Council tourism policies;
- License all tourist accommodation;
- Ensure traffic management;
- Obtain up-to-date and comprehensive tourism research data;
- Encourage dispersal of visitors to other areas;
- Protect environmental assets;
- Tighten controls on short-term businesses in residential areas;
- Encourage appropriate alfresco dining and street entertainment;
- Promote original values; and
- Educate community regarding the benefits of tourism.
- Exploration of increased funding through a differential rate and levy to enable Council to address the key issues;
- Conduct research into economic and community value of tourism to Byron Bay; and
- A visitor information centre that has a full-time manager, is financially self-sufficient, and is operated efficiently and effectively within the state network and accreditation system.

2.3 DESTINATION LIFE CYCLE ISSUES

A widely recognised tourism destination evolution model (Butler 1980) tracks this evolution though a life cycle of five stages, as shown below. Our perception of Byron's current position is shown as the "question mark" on the graph below – this takes into account the fact that the above projections of future growth may not take place as a result of this potential stagnation, with its direct resulting effect on the economy of Byron:



Source: After Butler, 1980

From observation over a number of visits to Byron Bay covering low, shoulder and peak periods and the consultation process, it appears the town is experiencing a level of mass tourism that is outgrowing infrastructure capacity.

Although no qualitative or quantitative base data is available to accurately identify the current life cycle stage of Byron Bay, there is now some evidence to suggest that Byron may be approaching a critical stagnation stage in its life cycle.

However at the present time, the rapid pace of development in Byron could compromise the medium to long-term well being of the Shire.

If the 1.7 million tourists we estimate visit Byron every year, the net effect on the town is significant. Even with the lower visitation estimate by TNSW of 1.2m, the quality of life for residents, the very ambience the visitor comes to see, is compromised.

Bearing in mind the principle that it is better to have fewer paying more, i.e. high-yield, low-volume tourism, it is fair to work on the premise that Byron, which is experiencing high-volume with questionable yield, is also experiencing lower quality of life for both residents and many visitors.

A key issue is that Byron is being managed as a town. This is acceptable from the resident viewpoint, but from the visitor's perspective they are visiting a destination, which is in reality could be viewed as a tourist attraction. Visitors visit the destination to enjoy the very environment that the community enjoys as a result of living in Byron.

If this is compromised then the very reasons for visitation diminish, along with associated economic well being for the community. There is therefore a strong argument that from the visitor's and community perspective, Byron should be managed in a similar manner to a significant tourist attraction, i.e. treated as one entity with associated constraints on visitation and its management, which will benefit both community and visitors.

We are of the opinion that Council has two main options:

1) Do Nothing

- In this case tourism pressures on the Shire will increase;
- The community will become more anti-tourism in attitude;
- Byron may enter a downward spiral in product quality and visitor experience;
- Divisions between Council, the community and tourism sector will widen;
- Pressure may increase on Council to 'do something';
- Byron's cultural and unique identity may be steadily eroded; and
- Infrastructure capacity may be further exceeded.

2) Introduce Appropriate Management Policies & Controls

The actions required are detailed later in this document. Over time, implementation of the recommendations would be expected to result in the following outcomes:

- A harmonious and professional relationship between Council, the tourism industry and the community;
- Retention of quality of life for residents;
- Maintenance and enhancement of community facilities;
- Preservation of natural assets;
- Preservation of cultural identify;
- Long-term industry sustainability;
- Retention of Byron Shire's position as an icon destination; and
- Product quality maintained.

A range of specific actions is recommended to begin to address the key issues and to establish a strategic framework to facilitate the appropriate future development of the tourism industry within Byron Shire.

Sustainable tourism means a tourism industry which can continue to prosper and provide strong economic benefits to businesses and community, while having an acceptable level of impact upon social and physical environments of Byron Bay. A tourism industry accepted by the community and in acknowledgement of environmental and social thresholds is needed to sustain tourism into the future.

Of course, the nature of the tourism industry is a complex interaction of all constituent components including the various types of accommodation, attractions, environmental attributes, services, infrastructure and community needs/aspirations.

However, for the purpose of this report key aspects and issues have been separated for consideration individually. These are:

- Tourist accommodation within Byron Bay generally;

- Traffic and parking within Byron Bay;
- Accommodation auditing and compliance;
- Short-term rental accommodation;
- Suffolk Park;
- Bangalow;
- Brunswick Heads;
- Mullumbimby;
- Rural and hinterland;
- Funding;
- Relationships and communication;
- Community impact and interaction;
- Visitor Information and booking services; and
- Research and tourism development planning.

2.4 OPPORTUNITY FOR CHANGE

Byron Shire Council is undertaking a number of significant studies, strategies and planning/infrastructure reforms, in particular:

- Wholesale review of the Byron Local Environmental Plan 1988 and development of 'place-based' local environmental plans, detailing the desired future character of specific precincts. This approach will include the formulation of objectives, development control principles, permissible land uses and desired use mixes, in addition to detailed design criteria

  This approach also conforms to the recent introduction of 'Planfirst', a review of NSW plan making provisions by the NSW Government (Planningnsw);

- Upgrade and increase in sewer capacity for Byron Bay (West Byron treatment plant); and

- Development of a parking strategy and consideration of:
  - Byron Bay CBD bypass and 'mini bypass' options;
  - Introduction of paid parking within the Byron Bay CBD;
  - Parking and transit centre; and
  - Pedestrianisation options.

These initiatives, and especially the development of place-based local environmental plans, present Council with an excellent opportunity to incorporate tourism specific actions and controls.

The report acknowledges the role of Mullumbimby, Brunswick Heads and Bangalow as well as the rural and hinterland areas for accommodating future tourism product. Actions aimed at facilitating this while maintaining town, village and rural character and amenity are included.

Actions relating to the placement of the Byron Shire within a regional context and opportunities for integration are also provided.

2.5 EMERGING THEMES

From the consultation and assessment processes a number of key issues and proposed or desired directions have emerged.

Of most significance is the growing recognition of the impacts which the current high visitor numbers are having upon the social, economic and environmental characteristics and attributes of the Byron Shire. The majority of these impacts are, of course, centred within and around Byron Bay itself.

Seven key issues fundamental to the future move towards a sustainable tourism industry have been identified. These are:

1) Opportunities for managing and potentially limiting the type and extent of further tourism product, in particular accommodation, within Byron Bay;

2) Opportunity for orchestrating a change over time of the mix of tourism product with a particular focus on increasing high yield, low impact accommodation and product;

3) Reducing the social impact of visitors to Byron Bay;

4) Access and parking issues including opportunities for a CBD bypass and park and ride/transit centre;

5) Addressing the issue of short-term rental accommodation for tourists, being a currently unregulated activity with acknowledged social impacts;

6) Maintaining a strong economy, recognising the economic contribution of tourism; and

7) The image of Byron Bay.

Sustainable tourism means a tourism industry which can continue to prosper and provide strong economic benefits to businesses and underpin and maintain quality of community facilities and infrastructure, while having an acceptable level of impact upon social and physical environments of Byron Bay. A tourism industry accepted by the community and an acknowledgement of environmental and social thresholds is essential to sustain tourism into the future.

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3.0 SWOT ANALYSIS

3.1 STRENGTHS

☺ High-level domestic and international recognition;
☺ Proximity to major domestic markets of South-East Queensland;
☺ Cultural diversity and acknowledgement for alternative lifestyle, therapies, etc.;
☺ Natural environment including beaches, headlands, rainforests, wetlands;
☺ Scenic hinterland and vibrant towns and villages;
☺ Central location within the tourism region;
☺ Alternative lifestyle and access to alternative therapies; and
☺ 'Great place to be'.

3.2 WEAKNESSES

☹ Traffic and parking congestion within Byron Bay CBD;
☹ Perception of negative social impacts including crime and safety issues;
☹ Environmental sensitivity;
☹ Infrastructure issues in particular limitations on sewage capacity;
☹ Iconic status resulting in extremely high visitation numbers;
☹ Resource and financial constraints;
☹ Lack of industry leadership;
☹ Inadequate proactive management of tourism;
☹ The tourism/resident conflict;
☹ Lack of planning and direction with respect to tourism;
☹ Poorly supported local tourism association;
☹ Inadequately resourced and networked Visitor Information Centre; and
☹ 'Great place to be' image could be compromised.

3.3 OPPORTUNITIES

😐 Addressing traffic and parking impact within Byron Bay CBD;
😐 Planning controls for tourism to be incorporated as part of councils LEP review;
😐 Strategic land use planning focusing on tourism;
😐 Encouraging appropriate tourism opportunities in the Shire's hinterland and towns/ villages;
😐 Focusing on high yield and niche tourism markets, in particular accommodation;
😐 Further development of festivals and events;
😐 Cultural tourism;
😐 Regional cuisine;
😐 Health retreats, alternative therapies and related products; and
😐 Activities that reflect the inherent character of Byron Bay.

3.4 THREATS

- ☹ Increasing and unsustainable visitor numbers;
- ☹ Increased accessibility to South-East Queensland market as a result of the highway upgrade works;
- ☹ Increased environmental sensitivity and damage;
- ☹ Community concerns and social impacts – continuing erosion of lifestyle;
- ☹ Economic impacts;
- ☹ Byron Bay may be at, or approaching, life cycle stagnation; and
- ☹ Incomplete understanding by tourism operators of destination life cycles issues or preparedness for any industry downturn.

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4.0 TOURISM PROFILE – BYRON SHIRE

4.1 BYRON SHIRE OVERVIEW

Tourism is of tremendous importance to Byron Shire. A dramatic increase in the Shire's popularity, stemmed primarily from the popularity of the Byron Bay township, has gained momentum over the past decade. The township of Byron Bay has had to expand to accommodate the increasing tourism industry.

More than 10% of employed persons are directly employed in the tourism industry. In fact 10.1% of employed persons are employed in the accommodation, cafés and restaurants division alone, driven almost exclusively by tourism. People are also employed in other tourism-oriented business such as tour operations, and retail and construction are highly interlinked with tourism, comprising 16% and 7.2% respectively.

A survey undertaken in 1997 (Banister, 1997) revealed the heavy reliance upon tourism. 'Many residents let their house or units to tourists during the year, not an uncommon practice in may tourist destinations. Respondents with small businesses in Byron, almost totally rely on the industry as a source of income.' (Banister, 1997: 26).

4.2 ACCOMMODATION ANALYSIS

'In 1988, the Shire's tourist accommodation supply was generally budget oriented comprising mainly caravan parks, cheap motels, holiday flats and hostel styles.' (Turner, 1997: 29).

Based on a sample of accommodation located with the township of Byron Bay and Suffolk Park, a significant representation comprises small and older premises. While new accommodation has been developed since the time of this survey, barriers exist in terms of perceived community acceptance for significant accommodation developments that provide infrastructure required for certain market segments. That is, there is an increasing trend towards self-contained accommodation that provides all needs in one location (security, undercover car parking, pool, gym, proximity to restaurants and cafés, etc).

Table 3 **: Accommodation**

TYPE OF ACCOMMODATION	SAMPLE NO. OF ESTABLISHMENTS	%	AV. PERIOD OF OPERATION (YRS)
Backpacker Hostel	9	17.3	5.3
Bed & Breakfast	10	19.3	2.3
Guesthouse	6	11.5	3.7
Farmstay	2	3.8	2.5
Caravan park	6	11.5	34.3
Motel	10	19.3	12.5
Hotel	2	3.8	*
Resort	7	13.5	9.6
Total	**52**	**100%**	

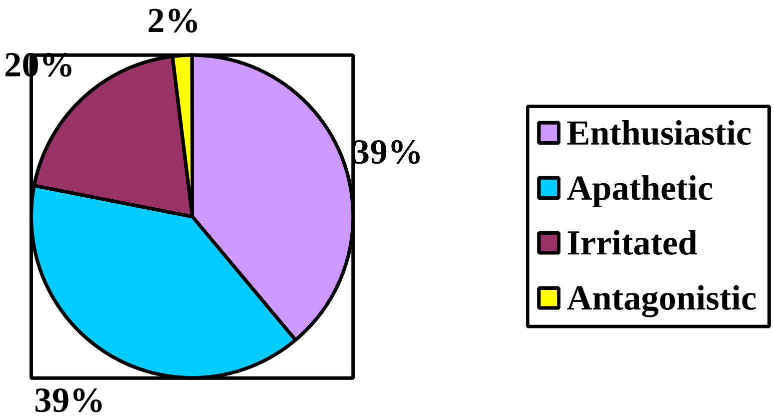
Source: Turner, 1997

* An average is meaningless as one hotel is over 100 years old and the other commenced in 1995.

4.3 SOCIAL ISSUES

Increasing levels of tourism growth has also led to criticism concerning tourism amongst some residents.

Interestingly, a small survey was undertaken in 1997 (Banister, 1997) regarding attitudes towards tourists in Byron, with the resulting four options emerging: enthusiastic, apathetic, irritated, and antagonistic.



The four options regarding attitudes towards tourism were: enthusiastic, apathetic, irritated, and antagonistic.

When correlated against employment status, a pattern began to emerge. In essence, employed respondents generally felt favourably towards tourism whilst more than half of unemployed people felt irritated. In fact, 79% of all employed persons were either enthusiastic or apathetic. 100% of students and 91% of retirees were also either enthusiastic or apathetic. However, 57% of unemployed people were irritated. A common theme amongst most respondents though, was 'the lack of ability of the local council in managing tourism.' (Banister, 1997:19)

'From the results, an overwhelming majority of respondents felt that the benefits of tourism outweighed the disadvantages. Nevertheless, despite the overall favourable response of residents, several negative reactions towards tourism emerged from the study. Such things as increased crowding, noticeable environmental degradation and the inability of the local Council to sustainably manage the industry, were just a few negative responses.' (Banister, 1997: 26)

4.4 BACKPACKERS

As the backpacker market segment is especially strong for the Byron Shire, due attention has been placed on this group.

Indeed, although potentially losing time relevance, the Byron Shire Tourism Plan (Ludwig Rieder & Associates, 1988) identified that a major growth segment for the Shire was the youth market, particularly overseas visitors. A strong form of accommodation for this group is backpacker hotels and youth hostels.

In comparison to coastal local government areas regions across the State, the Byron Bay local government area received the highest number of international tourists, who were aged in the 15 – 30 year old category. A high proportion of these visitors utilised a backpacker hostel or youth hostel, signifying the importance of this market segment to tourism in the area.

'Byron Bay has been purported by some in the local tourism industry to be the second most popular backpacker destination in Australia after Sydney'. (Taylor, 1993:3 in Wyatt, P.3)

According to a small survey in 1997, backpackers stay slightly longer than other visitors, with the average being 7.5 days. The survey revealed that ages ranged from 18 to 30, with the average being 22. 96% of the respondents were international visitors, with 46% from Britain, 16% from Sweden, 8% from Canada, and 6% from Germany.

Students and post-students were the most prevalent types of backpackers, with 30% of the group being students, and 22% between study and work. 24% were from a professional field, and 12% were employed in a clerical or sales capacity. The remaining 10% were from other categories.

Byron Bay's reputation is the driving force in attracting people, which were largely motivated by word of mouth as the primary form of information concerning the area. 'The motivation which emerged as the most influential was Byron Bay's reputation as a place to be visited.' (Wyatt, 1997:35). Other high rating responses included the opportunity for relaxation, the beauty of the area, and the atmosphere associated with Byron Bay. Low rating responses included surfing beaches and the fact that Byron Bay is the most easterly point in Australia.

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5.0 VISITATION ANALYSIS & PROJECTIONS : BYRON SHIRE

5.1 DEFINITIONS

5.1.1 TOURIST

Various definitions for tourism, tourists, visitors, VFRs (visiting friends and relatives), etc. exist. The variation in the definitions in itself causes great discrepancies in data, due to who is included in the surveying.

The definition of a tourist is often limited to staying at least one night or a 24-hour stay (World Tourism Organisation, Sharron Dickman, Neil Leiper, Bureau of Tourism Research, Christine French).

French et al (1997) defines tourism as necessarily involving a staying element stating quite simply that ‘people cannot be tourists unless they stay away from home for at least 24 hours’ (French et al, 1997: 57)

Such definitions necessarily mean that the data collected by peak bodies excludes visitors outside of these parameters (e.g. day-trippers).

For the purposes of this report, the following definition has been adopted:

‘Tourism entails experiences and involves the temporary short-term travel away from the place of usual residence and work, for reasons of leisure and/or business. (Backer, 2002).’

5.1.2 DAY TRIPPER

We recognise the importance of day-trippers and potential conversion of this market to longer stays, and as such have considered this market segment in the analysis. Nevertheless, recognition and benefits cannot be generalised, because of the different experiences sought by this segment.

However, we have considered a day-tripper to be as follows:

‘A Day Tripper is a visitor seeking experiences for reasons of leisure in an area away from the place of usual residence and work, for at least four hours duration that does not involve a night’s stay. (Backer, 2002).’

As such, only visitors undertaking tourism experiences in the Shire are included. Those people simply passing through, stopping merely for a short stop such as a meal or re-fuelling, etc. have been excluded from this analysis.

5.1.3 VFR

A market segment often underestimated in its numbers and contribution to a local economy is the VFR, visiting friends and relatives market.

For the purposes of this report, VFR data will only include visitors that utilise the accommodation of a friend or relative, regardless of the major purpose of the visit. VFR data will not include those visitors that may have come to the Shire for the purposes of visiting friends or relatives but are staying in commercial accommodation.

5.2 ANALYSIS

5.2.1 EXISTING DATA REVIEW

Data has been collected and analysed from Australian Bureau of Statistics, Tourism New South Wales, Bureau of Tourism Research, Southern Cross University, Byron Bay Visitors Information Centre and Byron Shire Council. In addition, various documents and reports were located, reviewed and analysed.

5.2.2 LIMITATIONS OF AVAILABLE DATA

In essence, available data relates either to the wider region in which Byron Shire exists, is out of date, or the survey methodology used was unreliable in terms of extracting relevant data for the purposes of this report.

In addition, much of available data and past surveying has often utilised commercial accommodation to gather statistics. Whilst this data can be extremely useful for illustrating many areas relating to tourism, it does not provide information relating to tourists only visiting for the day, nor does it include tourists not utilising commercial accommodation (i.e. Visiting Friends and Relatives).

It should also be noted that the data collected for commercial accommodation by Australian Bureau of Statistics is not comprehensive. Operators with fewer than fifteen rooms are excluded and weekly serviced apartments, caravan parks and hostels are excluded from ABS' regular Survey of Tourist Accommodation.

ABS' Survey of Tourist Accommodation only encompasses hotels, resorts, motels, guesthouses and daily serviced apartments with fifteen or more rooms or units.

Only every third year (commencing 2000) does the Survey expand to include holiday flats, units and houses of letting entities with at least fifteen rooms or units as well as caravan parks with at least 40 powered sites and visitor hostels that have a minimum of 25 bed spaces.

As such, this leaves out a significant proportion of accommodation in the Byron Shire. An analysis of rooms within the township of Byron Bay, which holds the largest volume of accommodation of the Byron Shire townships, indicates that the average number of rooms for most types of establishments falls outside the range: Note this analysis also includes data from the last full scope STA for the LGA.

Table 4 **: Room Analysis**

TYPE OF ACCOMMODATION	AV. NO. OF ROOMS	NO. SELF-CONTAINED ROOMS	TOTAL NO. ROOMS	BED SPACES
Backpacker Hostel	27.5	0	248	1,136
B&B	3.9	0	39	82
Guesthouse	5	1	30	68
Farmstay	4	4	8	40
Motel	14.4	46	144	450
Hotel	24.5	0	49	203
Resort	28.1	176	197	1,002
Caravan Parks*				3,522
Holiday Flats and Units*			613	3070
Total		**227**	**1328**	**9,573**

Source: Turner, 1997 * Information provided by TNSW.

In addition, regular surveying is not undertaken at Byron Bay Visitors Information Centre and available data is largely anecdotal and as such unavailable in written format. Due to a period of closure with the Centre, there is also an incomplete history regarding tourism. 'After the closure of the Tourism Information Centre at Byron Bay in 1996, many records regarding accommodation (bed space, occupancy rates, etc.) in the area were lost.' (Turner, 1997:1).

5.2.3 DATA METHODOLOGY

For the purposes of this report, we developed a model to estimate annual visitation numbers based on analysing trends in the past, surveying and building a model based upon utilising data from Byron Bay Visitor Centre.

Assumptions were then made for day visitor numbers and the numbers of people not using commercial accommodation, based on an analysis of trends in information centre data in other regions.

Our estimate of the numbers of visitors to the Shire staying with friends or relatives was derived based on a model being developed in calculating this information (Backer 2002). However the limitations of this model must be noted, as at this stage, the model is still being formulated and is based on the analysis of only five different shires and on preliminary data.

In addition TNSW data has been extracted from the National Visitors Survey and International Visitors survey. The NVS in particular has data, which is resolved down to a Statistical Local Area level. Tourism New South Wales utilises this data to prepare estimates of visitation to Local Government Areas.

TNSW estimate of the number of visitors to the Shire staying with friends or relatives was based on regional trends. It is interesting to note that although the data came from two different sources and were collated independently there the results have demonstrated very high visitations to Byron Shire.

5.2.4 VISITATION NUMBERS

Based on existing data and the results from our model, as mentioned previously, we estimate that annual visitation to the Shire is presently around 1.75million. This is inclusive of visitors staying with friends and relatives (VFR) and those people only visiting for the day.

***Table 5* : Visitation - Consultants**

MARKET SEGMENT	NUMBER OF VISITORS
Visitors staying in commercial Accommodation	1,014,240
VFRs	158,370
Day Trippers	580,000
Total	**1,752,610**

The range of visitation between our figure of 1.75 million visitors and TNSW's estimates of 1.2 million visitors to Byron Shire, can be compared with another destination, Noosa, Queensland, where recent in-depth research shows the number of visitors to be 1.89 million annually, of which 800,000 are day visitors.

While many visitors stay with friends and relatives, they may still be on a holiday and therefore categorise themselves outside the VFR segment.

From a basic analysis of our existing data, that is visitor numbers multiplied by average regional spend, we estimate that tourism injects over $306m into the local Byron Shire economy, which could be impacted by action not being undertaken.

5.3 TOURISM PROJECTIONS

5.3.1 OVERVIEW

Modelling projections for future visitation details to Byron Shire are somewhat speculative in light of the limitations of existing visitor data, as outlined in Section 5.2.

Based on the community consultations undertaken and discussions with key stakeholders, it is apparent that at the time of this analysis there are no major projects or marketing initiatives currently under consideration that may internally influence the past trend rate.

The major long-term influencing factor we expect outside normal industry fluctuations, is the new Northern NSW Motorway. The $348 million Chinderah to Yelgun Highway which was opened in August 2002, reduces the travel time from Brisbane to Byron Bay by approximately 30 minutes, resulting in a trip duration of approximately 90 minutes, bypassing the notorious Burringbar Range; a stretch of road involving tight corners, slow speed limits, 24-hour-a day speed cameras, and renowned for being the scene of many serious road accidents.

We anticipate that the new Motorway will lead to a sustained increase in short-break and day visitors; the short-break market being the fastest growing market.

However, the present ban on development in Byron Bay due to sewerage constraints, which is planned to be in place until at least 2004, may limit short-term growth.

Forecasting visitor numbers, particularly with any tenure, is extremely difficult. Tourism, as an industry, is characterised by supply inelasticity and price elasticity. It is also typically associated with large seasonality impact, fluctuating popularity of particular destinations and products, as well as strong competition and instability of demand.

If popular places or activities become unfashionable, visitation trends can promptly reverse. Tourism is also highly price elastic and as such, tourists can be greatly influenced by price wars at competing destinations.

As the domestic market is strong for the Byron Shire, international economic factors are likely to have little affect on the area, therefore being more inclined to enable a more consistent growth rate.

The short-break market is very important to the Shire, with Queensland being a strong visitor market, but with a shorter length of stay than other important markets such as Sydney and Victoria.

Due to the difficulty in predicting future economic conditions and tourism trends we have developed three scenarios for consideration, namely low, medium and high growth scenarios. Nevertheless, because of the extremely limited time series and other data, the following projections should be regarded as indicative only and assume that the existing level of infrastructure is maintained.

5.3.2 LOW-GROWTH SCENARIO

Based upon our estimates, in the low-case scenario, indicative visitation increases to 2,019,619 in 2007 and 2,327,404 in year 2012:

***Table 6* : Tourism Projections – Low-Growth Scenario**

MARKET SEGMENT	***YEAR 2007*** **NUMBER OF VISITORS**	***YEAR 2012*** **NUMBER OF VISITORS**
Visitors staying in commercial accommodation	1,1166,376	1,341,332
VFRs	186,243	219,022
Day trippers	667,000	767,050
Total	**2,019,619**	**2,327,404**

5.3.3 MEDIUM-GROWTH SCENARIO

Based on our estimates, in the medium-case scenario, indicative visitation increases to 2,116,518 in 2007 and 2,594,972 in year 2012:

Table 7 **: Tourism Projections – Medium-Growth Scenario**

MARKET SEGMENT	***YEAR 2007*** **NUMBER OF VISITORS**	***YEAR 2012*** **NUMBER OF VISITORS**
Visitors staying in commercial accommodation	1,247,515	1,497,018
VFRs	194,003	227,954
Day trippers	725,000	870,000
Total	**2,116,518**	**2,594,972**

5.3.4 HIGH-GROWTH SCENARIO

Based on our estimates, in the high-case scenario, indicative visitation increases to 2,279,190 in 2007 and 2,839,293 in year 2012:

Table 8 **: Tourism Projections – High-Growth Scenario**

MARKET SEGMENT	***YEAR 2007*** **NUMBER OF VISITORS**	***YEAR 2012*** **NUMBER OF VISITORS**
Visitors staying in commercial accommodation	1,298,227	1,583,837
VFRs	197,963	237,556
Day trippers	783,000	1,017,900
Total	**2,279,190**	**2,839,293**

While the assumptions on which the three scenarios are based are of a general nature and qualified by the limited availability of data, it is reasonable for us to assume that even the lower growth scenario by Year 2012 could have a detrimental impact on an unstructured tourism industry.

6.0 STRATEGIES

6.1 TOURISM ACCOMMODATION WITHIN BYRON BAY

6.1.1 OVERVIEW

Byron Bay will continue to experience strong demand for additional tourist accommodation. Essentially, we consider that the Council has two options available to them in dealing with this demand.

Option 1

To allow for ongoing further accommodation development within much of the commercial and residential zoned areas as per the current planning controls. Under this scenario the proposed place-based local environmental plan would not seek to create additional development controls, or establish prohibition (exclusion) areas/ precincts. This option is considered by us to be expected to result in:

- A decrease in social amenity and increase of some currently experienced negative impacts of tourism upon the resident population, including traffic congestion, high volumes of people in the town, noise impacts, crime and safety issues, and;
- Further infrastructure pressure issues in particular additional sewer loads in competition with other development types;
- Deteriorating visitor standards and experiences created by additional visitor numbers;
- Potential generation of a negative image of Byron Bay as a tourist destination;
- Loss of high-end market share; and
- Increased environmental impacts (exceeding of environmental carrying capacity).

Option 2 is to establish new controls seeking to limit the location and extent of tourist accommodation within Byron Bay. Opportunities presented with the placed-based local environmental plan could include:

- Control of development of tourist accommodation within certain areas;
- Permit only certain types of tourist accommodation within precincts;
- Permit new tourist accommodation only in areas assessed as having the necessary support and essential infrastructure;
- Allow for development in areas where impacts on resident amenity is deemed acceptable; and
- Establish controls relating to scale, form, streetscape, access, parking, landscaping, etc.

The controlled development option is recommended.

6.1.2 KEY ISSUES

- Research identifies between 1.2million and 1.75million visitors holiday in or visit Byron Bay each year;

- We consider visitation levels to be exceeding the social and infrastructure capacity of the Bay; and
- We consider visitation levels to be exceeding environmental capacity of the Bay (not confirmed);
- Council's proposed new planning controls (place-based local environmental plan) provide a mechanism for limiting tourism development; and
- Resources and costs of development control, including legal costs.

6.1.3 RECOMMENDED ACTIONS

1) Hotels/Motels

a) Permit through zoning controls new motels/hotels only within an identified commercial tourist precinct (developed as part of the place-based local environmental plan).

This precinct is to be defined based upon assessment of the concentration of existing hotels/motels within the CBD in proximity to the retail and visitor/recreation areas of, but not necessarily restricted to Bay Street, Jonson Street, Lawson Street, Byron Street and Fletcher Street.

b) Develop detailed design controls and incorporate within the LEP for the precinct. Controls aimed at:

- Streetscape;
- Building articulation and form (height and design);
- Access and parking;
- Servicing;
- Setbacks and overshadowing including assessment of the need to stagger street façade setbacks;
- Maintenance of significant views/vistas;
- Landscaping;
- Pedestrian areas, open space zones and linkages;
- Signage; and
- Redevelopment opportunities.

2) Bed and Breakfast Establishments

a) Identify suitable precincts for new establishments based upon the existence of current non-residential uses such as streets already characterised by lawful tourist accommodation activity.

b) Develop detailed design controls for B&B establishments and incorporate within the LEP for the precinct. Controls aimed at:

- Building form and style;
- Redevelopment and renovation aspects;
- Access and parking;
- Privacy;
- Signage;
- Maintenance of significant views and vistas;
- Pedestrian access and linkages; and
- Servicing.

3) Backpacker Establishments

a) Though new zoning controls, restrict future backpacker establishments to redevelopment of existing Council approved establishments.

b) Develop detailed design controls and incorporate within LEP. Controls aimed at:

- Size, scale and accommodation capacity;
- Access and parking;
- Public transport;
- Pedestrian access and linkages;
- Building articulation and form;
- Servicing;
- Setbacks and buffers to adjoining uses;
- Noise control;
- Privacy and landscaping;
- Signage; and
- Streetscape.

4) General Provisions

a) Prepare a schedule of all existing approved tourist accommodation developments and retain permissibility of developments within the LEP (via a new LEP schedule or 'not withstanding' provision). **Note**: This avoids the creation of existing use right provisions under the EPA Act 1979;

b) Control the use of garden flats/granny flats for tourist accommodation, through development of a suitable definition for use and incorporation within place-based local environmental plan;

c) Separately define 'serviced apartments' to differentiate between residential flat buildings and tourist accommodation. Identify areas where use is suitable based upon access, traffic and amenity (social impact) issues;

d) Separately define 'tourist attractions' and require development consent; and

e) Develop a policy for social impact assessment associated with proposals for major tourism development/ redevelopment. Apply shirewide.

6.1.4 RESPONSIBILITIES/LINKAGES

All actions are the responsibility of Byron Shire Council. Actions 1 (a), 2 (a), 3 (a), 4 (a) & 4 (b) must be undertaken in conjunction with Planningnsw.

Urban Design Advisory Service may be able to assist with the development of new controls. Also, support should be provided by State agencies on a whole-of-government basis to assist Byron Shire Council in fulfilling its short, medium and long-term objectives. The establishment of a State agency co-ordination group may well achieve this.

6.1.5 TIMING

All actions are priority and should be undertaken within year 1 of the plan.

6.1.6 OUTCOMES/MEASURABLES

- Development occurs only in conformity with new controls.

- High quality development.
- Assessed reduction in negative social impacts of tourism.

6.2 TRAFFIC AND PARKING WITHIN BYRON BAY

6.2.1 OVERVIEW

Byron Bay is experiencing high levels of day visitors, particularly from the growing South-East Queensland markets. Prior to the opening of the Yelgun to Chinderah Pacific Highway upgrade the number of day visitors was estimated at 580,000 per annum (Tourism New South Wales 2002).

Data is not yet available to quantify the increase in day visitors post highway upgrade, however, this increase is expected to be significant. Anecdotally, we have been advised that some businesses have experienced increased trade in the order of 20% - 25% since the upgrade. The day-visitor segment adds considerably to the documented traffic and parking problems within Byron Bay. Impacts associated with the day visitor market include:

- Limited parking availability within the Byron CBD;
- Traffic congestion within Byron Bay;
- High volume yet low yield per capita;
- Resource issues for Council associated with servicing, rubbish collection, etc.; and
- Pedestrian congestion within the CBD.

The day-visitor market is unable to be effectively regulated by planning controls. We are advised that Council is considering a number of parking and access options including the introduction of paid parking, CBD bypass and transit centre. Options for pedestrianisation and including potential for a mall in Jonson Street (between Lawson Street and Bay Street) have also been previously considered. A closure of this area for six days over the Christmas/New Year period is also proposed.

Increasing the pedestrianisation of the Jonson Street tourist retail area can assist in revitalising the precinct and will enable an increase in landscaping and street furniture. The precinct can be expected to become more vibrant with a 'sense of place' established. An increase in street music, arts and performances can be permitted, reflecting the significant cultural diversity of Byron Bay.

From a tourism perspective we consider there is merit in these proposals as they represent the only identified options for dealing with the expected increase in day visitors (and longer stay) tourist vehicle numbers. In stating this we acknowledge that it is beyond the scope of this report to assess the feasibility of options, nor the economic and social implications.

For Council's further consideration of this issue a range of vehicle traffic disincentive options is given in Appendix 1.

6.2.2 THE 'PARK AND RIDE' CONCEPT

A significant extension of the pedestrianisation concept would be to develop the main commercial/retail area as a 'park and ride' precinct. Such a concept has been developed in the Australian snowfields, in Noosa during peak periods, and in successfully managed tourist destinations in other countries throughout the world.

The concept involves an exclusion zone for private tourist vehicles within the commercial/retail precinct. This would not include resident or business/trade vehicles, which would use a permit system. Large "park and ride"/transit centres would be required within reasonable proximity to the town with an efficient, regular, environmental friendly, free shuttle service commuting visitors to and from the commercial/retail precinct. Significant revenue would be generated from parking charges.

As indicated earlier in this report, we consider that from the perspective of the residents the town is managed as their home and a community, in which people live every day.

From the perspective of the tourist, we consider that Byron Bay should be managed as a 'tourist attraction' and on tourist attraction management principles.

We request that readers consider some of those principles. For example, tourists pay to visit a tourist attraction, yet they do not expect to park in the middle of the attraction. They expect to park their vehicles in the car park and either catch shuttles or walk to and around the attraction.

If this is applied to Byron Bay it can attempt to achieve an improved quality of life for residents and improved quality of visitation for tourists. It is reasonable therefore for us to conclude that visitors could be expected to park outside the town in "park and ride" car parks, paying from $10-$20 per-vehicle-per-day for the privilege, taking a shuttle bus to the town, which would be effectively vehicle free. These vehicles could also operate around the town on a shuttle basis with no wait longer than 15 minutes for passengers. This would significantly reduce traffic in the town with associated improvement of quality of life.

The proposed exceptions to the vehicle-free rule would be:

- **Resident's vehicles.** These vehicles would be clearly identified by permit, be able to drive on a limited number of streets and park in resident car parks behind the retail precinct and in key locations; and

- **Short-term visitors staying in the town.** If the accommodation has parking for visitors vehicles, then a short-term pass could be issued with the booking confirmation allowing the vehicle to enter the visitor car-free CBD for the purposes of accessing their accommodation, parking at the accommodation only if parking is available and booked and is not on the street.

If accommodation parking were not available, the visitors' vehicles would be parked in a security park on the edge of town and the shuttle vehicles used to access accommodation, except for delivery of luggage.

We believe that the adoption of this model would facilitate Byron Bay being a very special to live in and a very special place to visit, complementing and retaining Byron's lifestyle image.

The potential benefits of the "park and ride" concept are considerable, however, a thorough study of the options and implications for this concept would be required to ascertain the overall suitability.

6.2.3 KEY ISSUES

- High levels of self-drive day visitors to Byron Bay;
- Levels expected to increase due to recent Pacific Highway upgrade (Yelgun-Chinderah);
- Traffic congestion affecting operation of CBD network, social and amenity issues;

- Council is considering opportunities for a CBD bypass, coupled with transit centre;
- Opportunity to install metered parking to provide revenue (considered limited deterrent);
- Opportunity to restrict vehicle access in Johnson Street, Lawson Street and Bay Street – need to consider economic and social impacts; and
- Economic impacts of other potential options.

6.2.4 RECOMMENDED ACTIONS

1) Finalise the CBD Bypass (or mini-bypass). Program and budget for construction.
2) Feasibility assessment of transit centre. If economically feasible, adopt and plan for transit centre and shuttle service.
3) Explore private, public/private and/or joint venture proposals for transit centre construction/ operation and shuttle service operation.
4) Undertake an economic and social impact assessment looking at options and implications for increased pedestrianisation of the CBD, in particular Johnson Street, north of Lawson Street intersection, and Bay Street.
5) Exploration of the suitability of paid parking options.
6) Undertake a detailed feasibility and suitability assessment of the "park and ride" concept. The assessment would identify the social and economic implications of limits on private vehicles within the commercial/retail precinct, other than resident or business/trade vehicles, associated infrastructure issues and legal impediments and arrangements/opportunities for continued use of currently approved private parking associated with existing tourism development.

6.2.5 RESPONSIBILITIES/LINKAGES

All actions are the responsibility of the Byron Council.

6.2.6 TIMING

Council is continuing with the investigation of the Bypass, transit centre and metered parking opportunities. Work should continue with a position adopted during 2003.

Action 4 (investigation) to be included in 2003/04 Council budget and program of works.

6.2.7 OUTCOMES/MEASURABLES

- Reduced traffic congestion in CBD.
- Improved resident and visitor amenity within CBD.
- Economic effect to businesses identified and acceptable.

6.3 ACCOMMODATION AUDITING AND COMPLIANCE

6.3.1 OVERVIEW

Byron Shire is experiencing incidences of unauthorised development and use of buildings for tourist accommodation. Compliance auditing and seeking remedy against unauthorised development is a resource and financial issue.

Placing additional development controls upon tourist development can potentially increase the incidence of unauthorised activity. A compliance and auditing program is required to address this.

6.3.2 KEY ISSUES

- Potentially significant levels of unauthorised (not Council approved) accommodation providers;
- Negative social and economic impacts of illegal accommodation; and
- Resources required ensuring compliance.

6.3.3 RECOMMENDED ACTIONS

1) Council to actively undertake compliance audit of identified accommodation providers. Commence action in respect of all unauthorised development/operations.
2) Council to develop a program for on-going monitoring and auditing.
3) Develop a ‘badging’ system involving a sticker/small sign for each Council-approved accommodation provider. Badge to identify that the development has Council approval.

6.3.4 RESPONSIBILITIES/LINKAGES

Council holds primary responsibility for implementation and funding of these actions. Other funding opportunities and assistance must be investigated and the opportunity for assistance by/from the local tourist association should be explored.

6.3.5 TIMING

Considered to be a priority – Year 1 and ongoing.

6.3.6 OUTCOMES/MEASURABLES

- Reduction in number of illegal operations.
- Reduction in associated negative impacts.

6.4 SHORT-TERM TOURISM RENTAL ACCOMMODATION

6.4.1 OVERVIEW

This is now a well documented and discussed issue for Byron Bay. There are cited instances where residents have been subjected to considerable impacts from excessive visitor noise, disorderly conduct, etc. The use of dwellings for short-term accommodation has to date been ineffectively controlled by the Council's planning powers and controls.

6.4.2 KEY ISSUES

- Unregulated increase in visitor accommodation; and
- Impacts on social amenity.

6.4.3 RECOMMENDED ACTIONS

1) Council to examine all feasible options to enable local regulation of the use of rental accommodation for short-term tourist accommodation. Seek support from other local councils with similar issues/social impacts.
2) Define 'short-term tourist accommodation' in respect of action 1 above.
3) Include definition of 'short-term tourist accommodation rental' within the place-based local environmental plan. Identify suitable precincts for short-term tourist accommodation rental based primarily on the existence of current non-residential uses such as streets already characterised by lawful tourist accommodation activity. Develop specific controls within the place-based local environmental plan aimed at requiring adequate off-street parking and dwelling standards.
4) Develop A Code of Practice for accommodation letting agencies and real estate agencies regarding responsible letting practices.

6.4.4 RESPONSIBILITIES/LINKAGES

- Action 1, 2 & 3 responsibility of Council.
- Action 4 to be actioned jointly by Council, NRRTO, Byron Chamber of Commerce and NSW Real Estate Institute.

6.4.5 TIMING

All actions recommended for commencement within year 1 of the plan.

6.4.6 OUTCOMES/MEASURABLES

- Reduction in social impacts from short-term tourist rental of residences.
- Letting agent Code of Practice developed, adopted and implemented.

6.5 SUFFOLK PARK

6.5.1 OVERVIEW

Suffolk Park has a close association with Byron Bay given their proximity. Tourist accommodation within Suffolk Park is mostly small-scale accommodation including caravan parks and small motels, catering predominantly for the family-oriented market and budget holidays

There is likely to be continual demand for further tourism development within the locality, placing additional pressure on the available services, the residential amenity, and the coastal environment. In order to maintain the character of the locality and to preserve resident amenity it is considered appropriate to limit further development in terms of both scale and type to existing product.

6.5.2 KEY ISSUES

- Current low-key development;
- Predominantly residential in character;
- Accessibility to Byron Bay; and
- Limited capacity for additional development (given environmental and amenity issues).

6.5.3 RECOMMENDED ACTIONS

1) Council's planning controls to limit tourist accommodation to small-scale, low-key development such as B&B establishments, cabin developments, small caravan parks, small hostels (e.g. 8-10 beds), and small motels;

2) Identify a limited number of suitable precincts (1 or 2) for these developments within Suffolk Park and restrict to these precincts. Limit tourist accommodation to these types; and

3) The place-based local environmental plan to introduce development controls relating to siting, design, scale, required services, etc. for new tourism development. Controls are to reflect and reinforce the current 'low-key' attributes of the locality.

6.6 BRUNSWICK HEADS

6.6.1 OVERVIEW

Brunswick Heads has a relatively low key, yet stable tourism industry focused around the fishing and coastal character of the town. Good opportunities present for further development of the tourism industry within Brunswick Heads, focusing on:

- The fishing industry and recreational fishing market.
- Family market/destination/ activities.
- Caravan parks.
- Small scale accommodation including motels.

Planning controls are recommended to facilitate additional product in keeping with the relaxed atmosphere and lifestyle of Brunswick Heads.

6.6.2 KEY ISSUES

- Current low key relaxed 'fishing village' atmosphere;
- Business and service changes due to town bypass; and
- Family oriented tourism industry.

6.6.3 RECOMMENDED ACTIONS

1) Council's planning controls to limit tourist accommodation to small scale, low key development such as B&B establishments, small caravan parks, cabin development, small hostels (e.g. 8-10 beds), and small motels.

2) Identify suitable precinct(s) for these developments and restrict to these precincts. Focus on areas within walking distance to the main CBD area and where adequate services and infrastructure is available.

3) The place-based local environmental plan to introduce development controls relating to siting, design, scale, location, etc. for new tourist development. Controls are to reflect and reinforce the current streetscape and 'village atmosphere' attributes.

6.6.4 RESPONSIBILITIES/LINKAGES

All actions are the responsibility of Council. Planningnsw should be approached for assistance.

6.6.5 TIMING

Year 2/3 of the plan.

6.6.6 OUTCOMES/MEASURABLES

- Maintenance of character of Brunswick Heads.
- Development occurs within assessed capacity.
- Acceptance by local community.

6.7 BANGALOW

6.7.1 OVERVIEW

The Bangalow Settlement Strategy 2002 identifies the unique village and heritage character of the town. The residents who seek to retain the quality of their lifestyle and the characteristics of their town value this character.

Bangalow displays solid potential for additional tourist development focusing on quality niche accommodation and attractions, in particular:

- Bed and Breakfasts.
- Heath retreats and nature based tourism experiences.
- Small scale motels, i.e. small establishments of 10-20 units.
- Regional cuisine initiatives.
- Festivals and events.

- Farmstay and agri-tourism.

Appropriate planning controls are recommended. aimed at preserving community values and town identity/character.

6.7.2 KEY ISSUES

- Council has prepared a settlement strategy for Bangalow;
- Strong village and heritage themes;
- Community seeks development controls reflecting the existing village characteristics;
- Opportunities for low key quality tourism product;
- Opportunities for niche markets, in particular B&B establishments; and
- Recognition for regional cuisine and local produce.

6.7.3 RECOMMENDED ACTIONS

1) Further promote regional cuisine initiative within Bangalow. Encourage restaurateurs to participate.
2) Amend Byron LEP 1988 to permit only low key tourism accommodation, in particular B&B establishments, health retreats, small hostels (e.g. maximum of 8-10 beds) and small motels.
3) Identify appropriate areas for these developments, focusing on areas within walking distance to the main street and where adequate services and infrastructure is available.
4) Develop specific design controls for tourism development incorporating scale, density, design, siting, landscaping and visual integrity controls, consistent with preserving heritage and streetscape attributes. Incorporate in place-based local environmental plan.
5) Presence of Bangalow in promotional material and VIC.

6.7.4 RESPONSIBILITIES/LINKAGES

Council responsible for all actions. Northern Rivers Tourism, Invest Northern Rivers and Tourism New South Wales can assist with promotion of the regional cuisine initiative.

6.7.5 TIMING

Mid priority – 2004.

6.7.6 OUTCOMES/MEASURABLES

- Sustainable increase in tourism within Bangalow.
- Maintenance of resident's amenity.
- Maintenance of village character.
- All tourist development low key/low impact.
- Increased recognition of Bangalow as a tourist destination.

6.8 MULLUMBIMBY

6.8.1 OVERVIEW

The Mullumbimby Settlement Strategy 2002 identifies the community's aspirations to maintain the relaxed rural character and lifestyle associated with the town. Given the natural and landscape setting of the town and it's proximity to the coast and Byron Bay, there is likely to be increased pressure for tourist development. Unchecked, this demand could significantly affect the character of the town.

Development in recognition of, and supportive of the town's character is recommended. This requires a range of planning controls to be developed and enforced.

6.8.2 KEY ISSUES

- Limited current tourism product;
- Capacity for additional product development;
- 'Country town' atmosphere;
- town identify valued by its residents;
- Proximity to the coast and Byron Bay; and
- Scenic and hinterland attractions.

6.8.3 RECOMMENDED ACTIONS

1) Council's planning controls to limit tourist accommodation to small scale, low key development such as B&B establishments, small caravan parks, cabin development, small hostels (8-10 beds) and small motels.
2) Identify suitable precinct(s) for these developments and restrict to these precincts. Focus on areas within walking distance to the main CBD area and where adequate services and infrastructure is available.
3) The place-based local environmental plan to introduce development controls relating to siting, design, scale, location, etc. for new tourist development.

6.8.4 RESPONSIBILITIES/LINKAGES

All actions are the responsibility of Council. Planningnsw should be approached for assistance.

6.8.5 TIMING

Year 2/3 of the plan.

6.8.6 OUTCOMES/MEASURABLES

- Maintenance of character of Mullumbimby.
- Development occurs within assessed capacity.
- Acceptance by local community.

6.9 RURAL AND HINTERLAND

6.9.1 OVERVIEW

There is considerable opportunity for additional tourism product development within the rural (hinterland) areas of the Shire. There are a number of quality tourist accommodation and service developments existing including health retreats, B&Bs, restaurants, etc. For the purposes of this Plan, 'rural and hinterland' refer to the current rural zoned land and the small hamlets/villages within the Byron Shire. Appropriately sited and designed development outside the towns and villages can provide for niche markets in the following key identified sectors:

- Nature-based tourism.
- Agri-tourism.
- Health retreats.
- B&B establishments.
- Indigenous tourism and cultural tourism.

6.9.2 KEY ISSUES

- Need for appropriate planning controls;
- Infrastructure demands and requirements; and
- Minimise environmental and social impacts.

6.9.3 RECOMMENDED ACTIONS

1) Council zoning under the new place-based local environmental plan to continue to permit rural tourist accommodation and attractions. Where possible, identify appropriate precincts based upon accessibility, infrastructure availability, social and environmental constraints.

2) Produce development controls to establish design and siting criteria for new development.

3) Adopt the *Guidelines for Nature Based and Ecotourism Development* prepared by Invest Northern Rivers and the Nature Tourism Task Force.

4) Provide through identification of suitable precincts, zoning, suitable areas for health retreats, farmstays and agricultural based tourism experiences.

6) Council, in conjunction with Northern Rivers Tourism, to encourage agricultural based tourism.

6.9.4 RESPONSIBILITIES/LINKAGES

All actions are the responsibility of Council. Planningnsw should be approached for assistance.

6.9.5 TIMING

Year 1/2 of the plan.

6.9.6 OUTCOMES/MEASURABLES

- Maintenance of character of rural areas.
- Development occurs within assessed capacity of localities.
- Acceptance by local community.

6.10 FUNDING

6.10.1 OVERVIEW

Resources and funding are required to ensure effective implementation of recommended actions and we consider that this is the responsibility of the Council and the tourism industry in the town, in addition to the tourist "user pays" finance generation opportunities provided in this options paper. Further consideration of the potential to generate income outside Council's non- standard or general revenue sources is required.

We believe that given the popularity of the Shire as one of the iconic destination areas in the nation, there is a compelling case for the introduction of a differential rate or levy. This is operating in a number of local government areas around Australia, e.g. Broome, WA; Mildura, Alpine Shire, Surf Coast and Ballarat, Victoria; the Grafton area in NSW, and more recently Caloundra City and Maroochy and Noosa Shires on the Sunshine Coast, Queensland. Introduction of this form of funding has been recommended in the recently completed Northern Rivers Regional Tourism Action Plan.

This method would not change the total rate revenue to Council (unless an application is made to the Minister for Local Government for 'above rate-pegging' increase) but the revenue raised would be directed specifically to the management of tourism and community related tourism impact issues.

While a rate levy is one manner through which finance could be raised to raise quality of life and tourism issues in Byron, other options should be carefully considered. For example:

- A tourist paying for the privilege of visiting the area is a fundamental issue and as the quality of destination is significant to residents and tourists, visitor volume and pressures needs be managed.

In terms of the user pays philosophy of charging visitors as previously mentioned, providing the ability to finance the management issues, examples of revenue streams that could be created are as follows:

***Table 9*: 'Park & Ride' Revenue Example 1**

NORMAL YEAR	TNSW	Consultants
Number of visitors annually.	1.20 million visitors	1.75 million visitors
Assuming 35% of visitors do not come by car and arrive by other means of transport, this equates to:	.78 million visitors	1.14 million visitors
With a conservative average of 2 persons per vehicle, the total numbers of vehicles would be:	390,000	568,750
If each vehicle was charged $10 for parking for 24 hours (minimum fee), total potential income could be:	**$3.9 million per annum for community, tourism and infrastructure benefit.**	**$5.68 million per annum for community, tourism and infrastructure benefit.**

On the same basis, the management of New Years Eve could generate significant income to assist with managing the impact on the community and finance visitor services to the town:

***Table 10* : 'Park & Ride' Revenue Example 2**

NEW YEARS EVE	
Organisers estimate 50,000+ people could visit Byron Bay on New Years Eve 2002, however, working on a conservative estimate:	40,000
Assuming the majority will come by car and the average per vehicle may be higher at say 3 persons per vehicle, giving:	13,333 vehicles
As this is a premium night, each vehicle is charged $20 to park for the night.	**$266,660 generated from one night to provide revenue for operation of the Visitor Information Centre and implementation of tourism management strategies.**

We stress that these examples are simplistic and indicative only, and do not take into consideration such factors as seasonality or external influences. Also, base visitation data must be verified through the research recommended later in this report.

6.10.2 KEY ISSUES

- Existing constraints on Council's available resources;
- Existing constraints on Council's available funding; and

- Implementation of actions requires a commitment of resources (staff, etc.) and funds.

6.10.3 RECOMMENDED ACTIONS

1) Council investigates and seeks approval to introduce a differential rate or levy; and

2) Council considers the benefits and in depth study of "park and ride" concepts and other appropriate income creation.

6.10.4 RESPONSIBILITIES/LINKAGES

Actions to be instigated by Council. Actions require State government approval &/or legislative change.

6.10.5 TIMING

Actions 1 & 2 are priority issues.

6.10.6 OUTCOMES/MEASURABLES

Provision of funding adequate to implement actions.

6.11 BYRON VISITOR INFORMATION CENTRE

6.11.1 OVERVIEW

The Byron Bay Visitor Information Centre (VIC) is currently handling approximately 160,000 enquiries per year. This level of enquiry places the VIC in the top 5% of regional information centres nationally in visitor volume.

The Centre is well located in premises owned by Council and provided on a peppercorn rental basis. We understand that Council does not provide any other financial support and the Centre is expected to be financially self-sufficient.

A Management Committee of the Byron Shire Tourist Association administers the VIC. However, the Association is under supported by the industry, has relatively few members, and has been described by several stakeholders as 'moribund'.

At the present time we consider future operations precarious, for the following reasons:

1) The financial resources needed to sustain a professional information service are minimal and declining;

2) The VIC has little support from the tourism industry and the community;

3) It is understood that the Centre currently has substantial debts;

4) The primary potential revenue-generating component – the booking service – has been outsourced, and while the Centre is expected to gain some income from this arrangement, we have been advised that there are problems with this issue; and

5) The part-time Manager has recently resigned.

Although the Centre has recently been accredited as a Level 1 facility, the accreditation administrators, the Aurora Group, have expressed concerns in relation to several aspects of the VIC operation, and have indicated it may be necessary to review the current level of accreditation, i.e. downgrading.

Given the high volume of enquiry, reflecting the importance of the VIC for the Shire, the potential of the Centre to assist in alleviating current pressures in Byron Bay by encouraging dispersal of visitors to other areas in the Shire and region, action is required to address and resolve the current situation.

The opportunity for the Byron VIC can be likened to the Noosa Visitor Information Centre which is an excellent example of a well managed VIC and the revenue that can be obtained from a booking service and other revenue-generating activities to achieve financial self-sufficiency.

This Centre handles 140,000 enquiries per year, 20,000 less than Byron Bay, but has a booking service turnover of approximately $1,000,000 annually, and employs the following staff:

- Manager (permanent);
- Five permanent part-time (permanently operating the booking service); and
- 40-50 volunteers.

The priority requirement is for a thorough review of the management and financial operations of the Byron VIC. This review must include:

- Management structure;
- Financial situation;
- Revenue-generating options including how the Centre could regain control of the booking service;
- Staffing requirements : employed staff and volunteer pool;
- Staff training; and
- Day-to-day operational procedures.

Furthermore, it is understood that Tourism New South Wales has initiated and coordinated discussions between the Byron and Lismore VIC representatives with the view to establishing an alliance. Lismore has considerable experience in operating successful VIC's. This arrangement would have benefits for both Shires and is supported in the recently released Northern Rivers Regional Tourism Action Plan. This proposal needs to be followed through with a feasibility study.

6.11.2 KEY ISSUES

- Need to establish effective and efficient management and operations; and
- Need to establish appropriate funding stream.

6.11.3 RECOMMENDED ACTION

Council seek to provide funding to conduct a feasibility study for future VIC operation. Councils to provide funding or provided from tourism "user pays" revenues.

6.11.4 RESPONSIBILITIES/LINKAGES

Initial actions to be instigated by Council.

6.11.5 EXPECTED OUTCOMES

- Operational stability;
- Quality 7-days-per-week service for visitors;
- Alliances with Lismore; and
- Financial self-sufficiency.

6.12 INDUSTRY LEADERSHIP, RELATIONSHIPS AND COMMUNICATION

Although the Shire has a tourism association, this organisation appears to be relatively ineffective and poorly supported. There are also a number of community organisations that seem to have little communication with the tourism industry.

The study has shown the need for strong industry leadership together with improved relationships and communication between Council, the community and the tourism industry.

We consider that one way of achieving this objective is the establishment of a Byron Community Tourism Advisory Board (working title) with the ability to co-opt additional expertise for specific tasks, as required.

An example of this type of board has been established in Noosa Shire and is working successfully, however, the Noosa Board has 14 representatives and we consider it to be to be too large.

In Byron, it is understood that this type of Advisory Board could be established under Section 355 of the Local Government Act, as a delegated committee of Council.

The Board should be skills-based and formed by inviting expressions of interest. A special sunset committee comprising Council, Tourism New South Wales, and appropriate community leaders should undertake selection of Board representatives other than Council.

We recommended a maximum of seven Advisory Board representatives, as follows:

• Council	:	2	(one elected member plus the GM or designated representative)
• Tourism	:	1	tourism operators (other than Councillors)
• Byron Community	:	1	community representatives
• Coastal community	:	1	either community or industry
• Hinterland	:	1	either community or industry
• Tourism New South Wales	:	1	
		7	

6.12.1 RECOMMENDED ACTIONS

1) Form a Selection Panel;
2) Establish the role and activities of the Advisory Board; and
3) Invite Expressions of Interest for representation.

6.12.2 RESPONSIBILITY

This Board should be initiated by Council, the role to include:

- Providing the link between Council, industry and community;
- Driving implementation of this tourism management plan;
- Assisting with development of other tourism-related plans; and
- Advising Council.

6.12.3 TIMING

Implemented within six months.

6.12.4 OUTCOMES

- Improved communication.
- Stronger leadership.
- Assistance for Council.

6.13 RESEARCH & SHIRE TOURISM DEVELOPMENT PLAN

6.13.1 OVERVIEW

While this report addresses some of the primary issues relating to management and future growth of the Shire's tourism industry, it is an options paper and cannot and does not cover the scope of a Tourism Development Plan (TDP).

A whole-of-Shire Tourism Development Plan is needed to establish the foundation and direction for industry growth, to ensure sustainability, and that the benefits are gained across the Shire and in each community.

The priority need for up-to-date tourism research data for the Shire is one of the main issues identified in the study, and while some research has been, and is being undertaken, this work is considered to be unco-ordinated.

We believe that what is required is in-depth research and analysis of tourism supply and demand as the first stage of a detailed and comprehensive 5-year Tourism Development Plan for Byron Shire to focus the efforts of all stakeholders.

6.13.2 KEY ISSUES

- Need for up-to-date tourism research and long-term planning for sustainable tourism growth and development.
- Resident quality of life.
- Preservation of natural assets.
- Identification of appropriate target markets and product opportunities.

6.13.3 RECOMMENDED ACTION

Council to seek support for commissioning in-depth tourism supply and demand research and a comprehensive shire-wide tourism development plan to include strategic planning and marketing.

6.13.4 RESPONSIBILITY/LINKAGES

Initiating actions to be the joint responsibility of Council and the Community Tourism Advisory Board.

6.13.5 TIMING

Initiating action within 6 months.

6.13.6 FUNDING

Seek support for this process to obtain funding from appropriate sources, including the Federal Regional Tourism Grants Scheme. We also consider that there may be potential for this to be funded from the proposed “park and ride” options and in particular the New Years Eve “park and ride” proposed.

6.13.7 OUTCOMES

- Clear direction for future management and growth of tourism across the Shire.
- Industry sustainability.

7.0 CONCLUSION

We consider that Byron Bay, Shire and Town are in need of pro-active management of its tourism industry to achieve an acceptable balance between the protection and maintenance of the standard of the lifestyles of residents, the quality of experience visitors wish to enjoy by visiting Byron and the environment.

We believe that considered and adequately financed implementation of this options paper and in particular the 5 year Tourism and Community Strategy, can shift the tourism impact upon Byron towards manageable and adequately acceptable community levels, improving the quality of life for residents, maintaining the quality of visit by tourists and the economic benefit tourism brings to Byron, thereby sustaining the community.

APPENDIX 1

VEHICLE TRAFFIC DISINCENTIVE OPTIONS

1) PHYSICAL

- Street width reductions;
- Street closing / diverters;
- Sidewalk widening;
- Auto-free zone;
- Mall extensions;
- Intercept parking;
- One-way streets/cul-de-sacs;
- Reduction of on-street parking;
- Reduction of attraction-area parking;
- Medians/turn restrictions;
- Through traffic bypass;
- Increase vegetation and planting in the CBD and surrounding areas; and
- Central area fringe parking (park and ride);

2) REGULATORY

- Area licences/short term licences for access to accommodation/parking permits (residents only);
- Tourist accommodation parking permits (visitors–short-term);
- Goods delivery restrictions;
- Co-ordinated home package delivery; and
- Staggered work/shopping hours;

3) OPERATIONAL

- Low speed limits;
- Driver information systems; and
- Signage;

4) ECONOMIC

- Tolls;
- Area permits; and
- CBD fringe parking fees.

5) URBAN DESIGN

- Improved pedestrian amenities;
- Seating;
- Shelter;
- Graphics;
- Planting and vegetation; and
- Paving and street furniture.

6) DEMAND

- Off-peak (mid-week/low-season) bookings;
- Land use planning/urban design;
- Growth management/sub-division/zoning;
- Balance short-term accommodation location; and
- Public relations to discourage driving to area.

7) ALTERNATIVE ADDITIONAL MODELS

- Lodge/shopping/entertainment/special event transit/park and ride;
- Commuter trails: bicycle/pedestrian;
- Bike storage facilities;
- Bus stop shelters;
- Improved bus equipment;
- Central area loop shuttle;
- Shuttle buses to activity centres;
- Tourist accommodation transit (limos, buses);
- Visitor luggage delivery;
- Improved express bus service from gateway;
- Reduced/free fare transit;
- Carpool matching;
- Pedestrian crossings signals;
- Increased hours of transit operation; and
- Dial-a-Ride transit 15 min max wait/frequency.

Source: After Voorhees, 1973

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