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Executive Summary

In 2019, 2.21 million people visited Byron Shire and visitors stayed for a total of 5.5 million nights. Over the next decade, visitor numbers are forecast to grow by between 50% and 75%. In 2030, Byron Shire can expect 3.86 million visitors and 8.5 million visitor nights if trends continue.

Tourism is a significant contributor to Byron Shire's economy; 27% of local jobs are in the tourism and hospitality industry and 16% of visitors stay in hosted accommodation. These activities provide Byron Shire residents with employment income.

Growth in tourism brings opportunities as well as challenges. Identified challenges include traffic congestion, parking, reduction in available and affordable residential housing, impacts on infrastructure and our environment and instances of behaviour not aligned with community's values.

Council has been taking action towards a sustainable tourism future for more than a decade. Until now, action has been guided by implementation of the Tourism Management Plan 2008-2018.

The development of this Byron Shire Sustainable Visitation Strategy 2020-2030 (SVS) will manage tourism for the next decade.

This is the first Sustainable Visitation Strategy for a regional destination in Australia. It is written in line with the Global Sustainable Tourism Council's criteria for a sustainable destination.

It outlines a framework to minimise the impacts and maximise the benefits that tourism can bring, whilst maintaining and protecting our natural and built environment, our culture, community and heritage.

The strategy has been built on engagement and collaboration under the banner of 'Talking Future Tourism'. It also makes use of research and data both by Tourism Research Australia and Byron Shire Council, full details of which can be seen in Sections 2 to 6.

This consultation and research has resulted in the development of a vision, values and six themes which, together, will guide the management and repositioning of tourism in Byron Shire over the next ten years.

The vision for Byron Shire's Sustainable Visitation Strategy 2020-2030 is:

"Byron Shire welcomes visitors and supports a visitor economy that cares for and respects our residents, creates low-impact visitor experiences, protects our natural environment, celebrates our cultural diversity and shares our social values".

This vision is underpinned by the following values and principles as expressed by our community through this strategy's engagement process:

1. **Respect** for community, nature, others and self
2. **Appreciation** of culture and social diversity
3. **Conservation** of the natural environment and biodiversity
4. **Diversity**, welcoming and acceptance
5. **Balance** of economic, social and environmental impacts
6. **Cultural respect** for Indigenous history and spirituality
7. **Live** in harmony and safety
8. **Lifestyles** of those who are active, healthy and sustainable
9. **Education**, enlightenment, searching and problem solving
10. **Balance** between laid-back/relaxed and engaged/activist

The six themes are:

1. **Leadership and Destination Management**
2. **Repositioning Byron Shire**
3. **Culture**
4. **Events**
5. **Transport, Infrastructure and Open Spaces**
6. **Planning for Visitor Accommodation**

This strategy explores each of these themes, including the use of local and international case studies.

The strategy concludes with an Action Plan, outlining short and long term strategies to guide work towards a sustainable tourism future for Byron Shire.

Please note: this is a working document. All tables, charts, text will be formatted according to national accessibility and vision guidelines.

Acknowledgement of Country

In the preparation of this document, Council acknowledges and pays respect to the Bundjalung of Byron Bay – Arakwal People as Traditional Custodians of the land within Byron Shire and part of the wider Aboriginal Nation known as the Bundjalung.

Council acknowledges and respects the Widjabal and Minjungbal people as Traditional Custodians within the Byron Shire.

Council acknowledges the Aboriginal and Torres Strait Islander People who now reside within the area.

Accessibility

This strategy will be formatted with print inclusive design and legibility considerations, developed by Digital Access at Vision Australia to support the creation of accessible content and equal access to information for people with disability or age related impairment.

Foreword from the Mayor

The Byron Shire Sustainable Visitation Strategy 2020-2030 is about applying best practice and local authenticity to get the best possible outcomes for our community, industry and visitors.

This is the first Sustainable Visitation Strategy to be implemented by a regional destination in Australia.

Written in line with the Global Sustainable Tourism Council's destination criteria for sustainable tourism, this new and inspiring strategy recognises the impacts visitation has on our environment and the community while also supporting our visitor economy. It is underpinned by well-designed and committed consultation that reached out widely to connect and 'talk tourism' with more than 1200 members of the community, industry and visitors, both online and in person through kitchen table discussions, deliberative democracy process workshops, industry meetings and forums. I thank everyone who took the time to participate and make their views and ideas known. As part of the consultation, we further strengthened this engagement by taking the extra step of considering the views of a community solutions panel made up of 26 randomly selected residents and/or ratepayers.

It is no surprise to hear that our community wants a visitor economy that aligns with our community values of sustainability, care and consideration of environment, and respect for our towns, villages and residents. What we have in this new strategy is a strong, globally-recognised path lit up by our local values that will guide us to achieve this desired balance for a healthy and more sustainable visitor economy over the next ten years.

- Cr Simon Richardson, December 2019

Section 1: Strategic Alignments

1.1 Byron Shire Community Strategic Plan 2018-2028

This strategy aligns with the broader Community Strategic Plan 2018-2028, *Our Byron, Our Future*, which is a whole-of-Byron Shire plan, developed following in-depth community engagement to understand our collective vision, aspirations and priorities.

The Community Strategic Plan reads: 'We manage growth and change responsibly. In the delivery of tourism, Council's responsibility is to work collaboratively to build a tourism industry that delivers local and regional benefits in line with the community's values.'

1.2 Byron Shire Tourism Management Plan 2008-2018

The Tourism Management Plan 2008-2018 was Council's first Tourism Plan to address concerns from residents about tourism growth. At that time, the tourism sector and community supported the need for a coordinated and strategic management of tourism.

Key actions achieved during implementation of the Tourism Management Plan between 2008 and 2018 include:

- Employment of two new Council roles; a Tourism Officer and an Events and Film Liaison Officer, providing customer support five days a week
- Renovation of the Byron Bay and Brunswick Heads Visitor Information Centres
- Development of the "Don't Spoil Us, We'll Spoil You" visitor brand for Byron Shire, including distribution for use by the local tourism industry
- Improved access to information for visitors
- Place making and laneway activations in Byron Bay to support an alternate night-time economy
- Multiple activities promoting visitors to explore the whole Shire
- Development and launch of Byron Business Events Bureau
- Introduction of paid parking in Byron Bay with resulting increased spending on road and open space infrastructure
- Improved data collection and reporting
- Productive relationships with government agencies, industry and regional stakeholders.

1.3 National Parks and Wildlife Service

NSW National Parks and Wildlife Service (NPWS) is managed by the State Government. The management of these assets and the type and extent of uses are predominantly dictated by reserve status taking into account the natural, cultural and social values of an area.

Cape Byron is the most visited reserve in Byron Shire, typically with over one million visitors per year. The walking track and iconic lighthouse are regularly within the Top 50 locations by search volume on the NPWS website.

In 2018, there were an estimated 60.23 million visits to reserves managed by NPWS, a growth of 16.6% from 2016.Global interest in nature-based tourism provides new opportunities for the NSW visitor economy, especially for regional communities.

1.4 Local, State and Federal Government responsibilities

Council's role in the tourism sector is to support, promote and advocate for industry and community.

In any discussion around tourism, it needs to be recognised that many issues and initiatives are outside the influence of local government. Many important initiatives are the responsibility of either industry operators or State and Federal Government.

1.5 Global Sustainable Tourism Council

The Global Sustainable Tourism Council (GSTC) is an independent organisation that strives to achieve best practices in sustainable tourism.

The GSTC recognition program focusses on the four key areas of sustainable tourism:

A. **Overall sustainable destination management** – focussing on governance, collaboration, high-quality tourism product and high-levels of visitor and community satisfaction.
B. **Maximise local economic benefits** – supporting local and indigenous businesses, sustaining employment, inclusion and vibrant communities while reducing negative impacts.
C. **Maintain and develop a sense of culture** – conserve built and living cultural heritage and values, cultural understanding and distinctive and experiential tourism.
D. **Maximise benefits to the environment**– conserving and preserving natural heritage, biodiversity and nature tourism while reducing negative impacts.

Sitting underneath these four areas are 41 criteria. Each of this strategy's themes are written in line with these criteria, detailed in the table below.

Note: To view a larger version of this table, please refer to Appendix 2.

Table 1: Global Sustainable Tourism Council (GSTC) criteria

A. Overall Sustainable Destination Management	**B. Maximise Local Economic Benefits**	**C. Maintain and Develop a Sense of Culture**	**D. Maximise Benefits to the Environment**
A1. Develop Sustainable Destination/Visitation Strategy	B1. Economic Monitoring	C1. Attraction Protection	D1. Identify Environmental risks
A2. Destination Management Organisation	B2. Local Carer Opportunities	C2. Visitor Management	D2. Protection of Sensitive Environments
A3. Monitoring	B3. Public Participation	C3. Visitor Behaviour	D3. Wildlife Protection
A4. Tourism Seasonality Management	B4. Local Community Opinion	C4. Cultural Heritage Protection	D4. Greenhouse Gas Emissions
A5. Climate Change Adaptation	B5. Local Access	C5. Site Interpretation	D5. Energy Conservation
A6. Inventory of Tourism Assets & Attractions	B6. Tourism Awareness & Education	C6. Intellectual Property	D6. Water Management
A7. Planning regulations	B7. Preventing Exploitation		D7. Water Security
A8. Access for all	B8.Support for Community		D8. Water Quality
A9. Property Acquisitions	B8. Supporting Local Entrepreneurs & Fair Trade		D9. Wastewater
A10. Visitor Satisfaction			D10. Solid Waste Reduction
A11. Sustainability Standards			D11. Light and Noise Pollution
A12. Safety & Security			D12. Low-impact Transportation
A13. Crisis & Emergency Management			
A14. Accuracy in Promotion			

Section 2: Engagement and Research Informing The Strategy

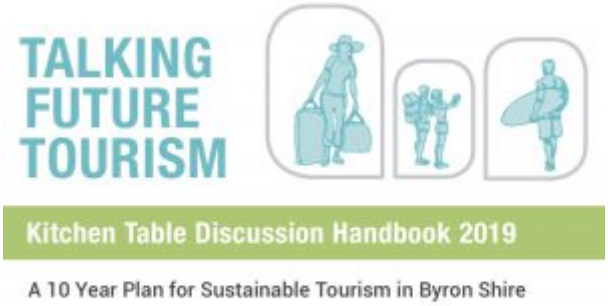
Council engaged with the community, industry, visitors, staff and stakeholders to inform the Byron Shire Sustainable Visitation Strategy (SVS), through a variety of activities including Kitchen Table Discussions, workshops and focus groups. These included both primary and secondary research methods:

Primary research – consultation

- Industry Tourism Issues Workshops

    - Five workshops were held during May 2018 in Byron Bay, Ocean Shores, Brunswick Heads, Bangalow and Mullumbimby, with over 100 stakeholders attending.

    - These workshops identified tourism issues such as short-term rental accommodation, rural weddings and traffic congestion as having key impacts on the Byron Shire tourism experience.



- Talking Future Tourism Kitchen Table Handbook and discussions

    - From March to April 2019, discussions included 11 facilitated community meetings and over 1200 individual responses from community members.

    - The format included information provided in a handbook with six related questions to guide participants in discussions about the future of tourism in Byron Shire. The six topics were:
        1. Tourism in Byron Shire: The Facts, Figures and Trends
        2. Economy and Infrastructure: Benefits and Impacts
        3. Culture: Maintaining the Vibe
        4. Our Unique Environment
        5. Events: Local, Emerging, Celebrations and Global Festivals
        6. Short Term Rental Accommodation (STRA).

Photo: One of many Kitchen Table Discussions held in Byron Shire, March 2019

- Visitor focus groups

    - Held in March 2019, independent research company Truth Serum held three focus groups with visitors who either:
        1. visited Byron Shire in the last 12 months
        2. intend to visit in the next 12 months
        3. were repeat visitors, or
        4. were families with children, young singles/couples and adult households with no children.

    - Topics and information discussed were the same as in the Kitchen Table Discussions Handbook, as outlined above.

- Stakeholder interviews

    - Held between March and May 2019, twenty interviews were conducted with Council staff working in service areas that are impacted by the visitor economy, aiming to understand the impacts of tourism on Council services and what actions were recommended.

- Community Solutions Panel

    - This deliberative democracy process saw 26 randomly selected Byron Shire residents and/or rate payers ponder the question – 'W*hat actions can Council take to align visitor behaviour with community values?*

    - The Panel was presented with all research findings, statistics, case studies and audit outcomes. The panel participated in a tourism familiarisation tour on

which they also heard from stakeholders about visitor economy issues and opportunities.

- The process was facilitated by The RPS Group over three weekends in May and June 2019 and the panel presented their report and feedback to Councillors in August 2019.

Photo: Sustainable Visitation Strategy Community Solutions Panel

Primary research - audits

Two audits were undertaken specifically for this strategy:

- Byron Shire accommodation audit
    - An audit of visitor accommodation and capacity throughout Byron Shire was completed in early 2019.
    - This was largely conducted using directories, websites and walk arounds.
    - The audit included traditional accommodation, apartments and holiday homes.
- Byron Shire tourism product audit
    - An audit of tourism attractions, restaurants, wellness centres, transport and activities was undertaken in early 2019.
    - This was largely conducted using directories, websites and walk arounds.

Secondary research – analysis of previously collected data

Visitor volume data presented in Section 4 has been taken from the National Visitor Survey (NVS) and the International Visitor Survey (IVS). These are surveys by the Commonwealth, State and Territory governments and administered by Tourism Research Australia under the guidance of the Australian Standing Committee on Tourism (ASCOT).

The NVS is a major survey of domestic travel by Australians, with an annual sample size of 120,000 (since 2004).

The IVS represents the most comprehensive source of information on international visitors to Australia (since 2004), with an annual sample size of 40,000. Both are recognised as Australia's official sources of tourism data.

Expenditure data is based on NVS and IVS data and TRA's Regional Expenditure Allocation model (REX).

Secondary research – forecasting

The forecasts were prepared using a combination of data-based analysis and market assessment. The data analysed related to the Byron Shire and its main sources of visitors. Both were analysed over extended time periods alongside efforts to identify significant factors that may have influenced visitor flows. Availability of Byron Shire and market data over a long period of time permitted the assessment of trends and the development of several projections. These were assessed alongside each other and discussed in the context of broader tourism trends as a part of determining the final forecasts.

Forecasts are currently presented in calendar years.

Secondary research – case studies

Future tourism trends and illustrative case studies have been selected from local, national and international regions with similarities to Byron Shire.

Section 3: Byron Shire Community Profile

This section aims to provide a snapshot of the residential profile of Byron Shire, providing a context for the impacts of tourism.

3.1 Resident demographic data

Byron Shire is part of the Northern Rivers district in New South Wales. It shares boundaries with the Tweed, Lismore and Ballina local government areas. The Northern Rivers is in close proximity to South East Queensland (SEQ), which is expected to grow from 3.5 million people to 5.3 million over the next 25 years.

Our Shire's proximity to Brisbane (less than a two hour drive) and the Gold Coast (a half hour drive) means our residents and businesses enjoy many of the economic and social benefits enjoyed by city residents. It also means we face many of the same growth management issues as SEQ, including population growth, rising land costs, high tourist

numbers, development pressures on natural assets and farmland, and the need to invest in extra infrastructure and community services. These pressures are comparable to those in Sydney's outer suburbs.

The Bundjalung of Byron Bay (Arakwal) people have occupied these lands for generations. They continue to live on, and care for Country today.

Our residents, households and housing types

Maintaining our diverse community and social cohesion are essential for the Shire's social and economic vitality. A critical pathway to this outcome is ensuring a good future supply of housing for a range of incomes, lifestyle choices, household types and life stages.

In 2016, the Census recorded 31,570 residents in Byron Shire. Of these, 22,720 (72%) lived in urban areas, with the remaining 8,850 residents (28%) living in rural areas and localities.

Our population will continue to increase. An extra 6,400 residents are expected by 2036 (an annual growth rate of around 0.8%).

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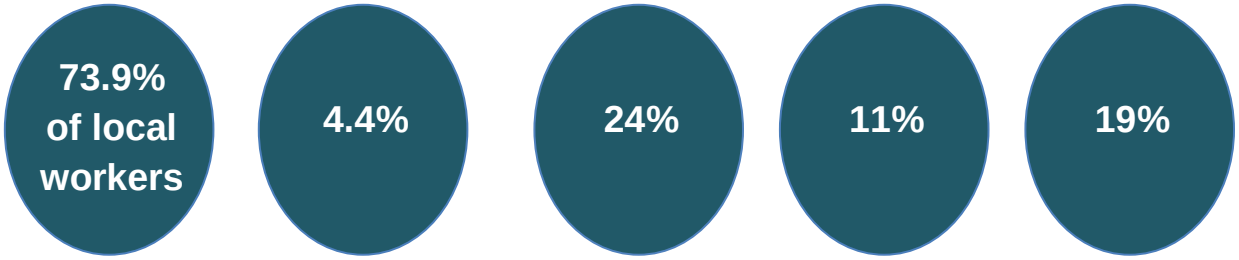
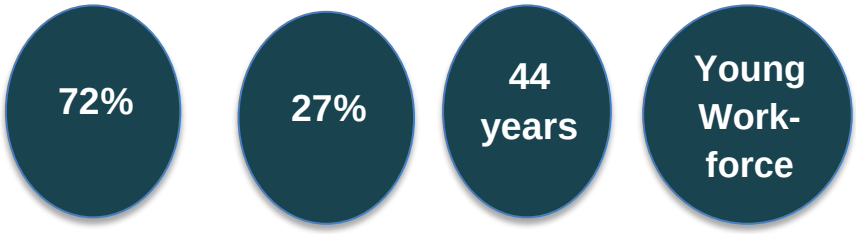
Our residents

We have 31,570# residents



live and work locally | **need help day-to-day due to disability** | **University qualification *** | **Advanced Diploma or Diploma Qualification*** | **Trade qualification (certificate)***

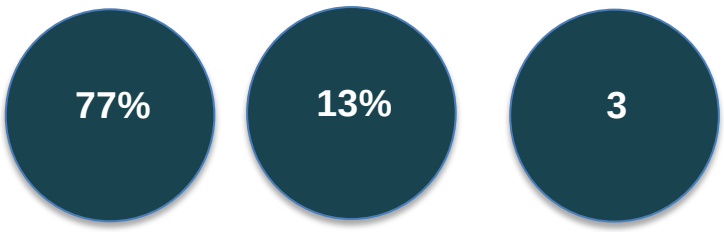
\# Usual place of residence statistic, (the estimated resident population was 33,399 residents)
* Persons age 15 year+
Source: ABS 2016 Census



of all Shire residents live in our towns and villages | **renters** | **resident median age** | **More workers under 45 years of age**

Our homes

We have 15,420 homes



detached houses | **unoccupied homes** | **bedrooms in most dwellings**

Our households

We have 13,484 households

one person households

households in housing stress

group households

average household size#

Our income

Median total household income ($weekly)

Median total personal income ($weekly)

This is largest income group in Byron Shire

(31.4 % on a $498 to $891 weekly household income)

Source: ABS 2016 Census

Our age structure

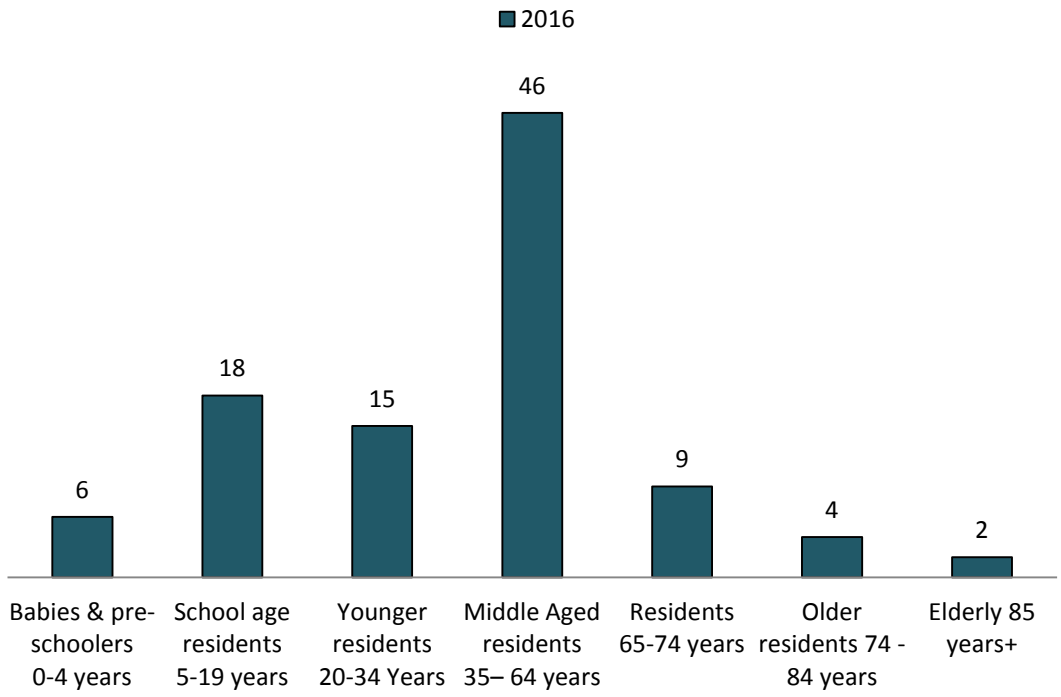
aged between 0 and 14 years

working age 15- 64 years

65 years and over

resident median age

Source: ABS 2016 Census



Source: Department of Planning, Industry and Environment

Figure 1: Life-stage profiles Byron Shire residents 2016 (percentage)

Note: To view a larger version of this figure, please refer to Appendix 2.

3.2 Our towns and localities

Byron Shire can be seen as a community of towns and localities. Each town and locality has its unique character and offerings, which collectively contribute to the culture of Byron Shire. An important part of understanding the needs and aspirations of the individual communities which form the shire, is active participation by locals in decision making and planning processes.

Our main towns and localities are:

Ocean Shores, New Brighton and South Golden Beach (Population: 6298)

Byron Bay (Population: 4229)

Suffolk Park (Population: 3795)

Mullumbimby (Population: 3781)

Bangalow (Population: 1807)

Brunswick Heads (Population: 1630)

Figure 2: Population per area as of 2016

Note: To view a larger version of this figure, please refer to Appendix 2.

Byron Bay and Suffolk Park

Byron Bay and its adjacent residential areas are situated in the south eastern part of the Shire. The population is expected to increase by some 3976 people over the next 20 years to reach approximately 12,000 people.

Byron Bay and surrounds or 'Cavanbah' as it is known by the Bundjalung people is an iconic place with unique history as a meeting place, industrial township, significant port, and spiritual centre. Spectacular beaches extend north and south of a large volcanic outcrop Cape Byron or 'Walgun'.

The Byron Bay town centre will continue to play a primary role as the tourism, retail and entertainment hub of the Shire. Byron Bay's historical role as a ‘meeting place’ for all people is a key reason why the town centre is so unique. The Byron Bay master plan expresses a vision to connect the centre of Byron Bay with the spirit of its community.

Byron Bay attracts visitors due to the natural environment, laid-back culture, shopping, eateries and nightlife and its identity as a haven for celebrities who enjoy relative anonymity.

Byron Bay has a strong mix of accommodation options, with 57% of bed spaces in the shire. The accommodation mix includes motels, apartments, resorts, hotels, holiday houses, caravan and holiday parks, home stays and guest houses. With its proximity to Byron Bay, Suffolk Park is a popular area for short term rental accommodation.

Byron Bay is very popular with day trippers, domestic overnight visitors and international visitors.

Mullumbimby

Mullumbimby is situated in the northern part of the shire and is an important service centre for town residents and the surrounding rural area. The population is expected to increase by some 1950 people over the next 20 years to reach approximately 5740 people.

Mullumbimby acts as the core service centre for much of the Byron Shire. The Mullumbimby masterplan (2019) notes that continuing to encourage this function and further develop opportunities for a socially, culturally, environmentally and economically sustainable town centre will be key to retaining vibrancy.

Mullumbimby has a variety of cafes, retail, parks, museum and regular farmers' and community markets.

Mullumbimby has also seen a rise in its accommodation stock of short-term rental accommodation to cater for the increase in visitor numbers to Byron Shire. Mullumbimby is a popular day tripper destination.

Bangalow

Bangalow is a rarity', a largely intact early twentieth century village that has transformed into a thriving 21st century village without losing its rural charm or its sense of close, cohesive community. The population is expected to increase by some 740 people over the next 20 years to reach approximately 2525 people.

Bangalow has an economically viable centre, providing a range of services to the people of the community, surrounding area and visitors. The village has a balanced blend of boutique shopping and creative industries.

The Bangalow Village payment plan (2019) expresses Bangalow's village centre as a place where you want to 'linger longer'. Spaces are created where people can meet, eat, drink, relax and enjoy outdoor living in the balmy sub-tropical climate. Streets and public spaces are vibrant and active, both by day and night.

Bangalow does not have any traditional tourist accommodation such as hotels or motels, but does have some guest houses and holiday homes in the surrounding hinterland. Bangalow is a very popular day tripper destination.

Brunswick Heads

Brunswick Heads is a small coastal village located on traditional lands of the people of the bungling nation. The population is expected to increase by some 740 people over the next 20 years to reach approximately 2370 people.

The functional, practical and utilitarian beginnings as a logging and fishing village most valued nature reserves, wetlands, the Brunswick River and estuary, foreshore parkland and the beach combine to give an aesthetic appeal that is humble in scale. This appeal has helped make Brunswick Heads a popular family-friendly seaside holiday destination over the decades.

Brunswick Heads will continue to operate as a low-key retail centre attracting locals and visitors drawn to the river and beachside amenity. 'Simple pleasures' is the catch-cry of Brunswick Heads, promoting it as a small, unspoiled coastal, family friendly village offering a quality mix of café's, restaurants, specialty shops, accommodation and a variety of activities including community festivals and events.

Brunswick Heads' accommodation mix includes a hotel, motels, caravan parks and holiday homes and attracts day trippers and overnight visitors.

Ocean Shores, New Brighton, South Golden Beach and Billinudgel

Situated between the coast and the hinterland, this area houses the shire's second-largest urban community. The population is expected to increase by some 760 people over the next 20 years to reach approximately 7060 people.

The hilly nature of the area allows all aspects of the natural environment to be appreciated, with various places benefitting from beach and hinterland outlooks. Many residents have canal and nature reserve views supporting a growing interest in water-based leisure, sporting and art activities. More and more tourists are visiting Ocean Shores for its services and amenities due to its proximity to the North Byron Parklands; a 660 acre cultural arts and music events venue at Yelgun, renowned for events such as Splendour in the Grass and the Falls Festival.

With one of the smallest residential populations of Byron Shire, Billinudgel has developed as an important business, community services and employment area. After recent flooding, the community came together to launch the 'Billinudgel is Back in Business' campaign.

In the last ten years, with the North Byron Parklands event site, there has been a significant rise in the amount of short-term rental accommodation in the area. The area attracts day trippers and overnight visitors.

The emerging hinterland

Hinterland localities are receiving a surge in interest from visitors wishing to discover local produce, quaint stores and foodie delights, all while taking in the hinterland scenery.

About 20 kilometres from Byron Bay, localities such as Main Arm, Nashua and Federal are located close to the World Heritage rainforests and national parks for which the area is famous.

Section 4: The Past – Our Visitor Economy To 2019

This section provides detailed overview, data and analysis of Byron Shire's visitor economy over the past eleven years (2008-2019). For each data set, a graph will be followed by key points.

Visitor volume data has been taken from the National Visitor Survey (NVS) and the International Visitor Survey (IVS). These are surveys by the Commonwealth, State and Territory governments and administered by Tourism Research Australia under the guidance of the Australian Standing Committee on Tourism (ASCOT).

The NVS is a major survey of domestic travel by Australians, with an annual sample size of 120,000 (since 2004).

The IVS represents the most comprehensive source of information on international visitors to Australia (since 2004), with an annual sample size of 40,000. Both are recognised as Australia's official sources of tourism data.

Expenditure data is based on NVS and IVS data and TRA's Regional Expenditure Allocation model (REX).

Visitor definitions used are based on those provided by the United National World Tourism Organisation as follows:

- **Day Visitors:** Trips with a round trip distance of at least 50 kilometres where the traveller is away from home for at least four hours and does not spend a night away from home. Some day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home.

- **Overnight Visitors:** Trips involving a stay away from home for at least one night, at a place at least 40 kilometres from home. Trips where the respondent is away from home for more than 12 months are excluded.

Associated estimates have been prepared for the number of nights overnight visitors spend in a destination as well as an estimate for visitor days.

An overall estimate of 'visitor days' assumes that one visitor night is equal to one visitor day. Total visitor days are therefore the sum of domestic day visitors, domestic visitor nights and international visitor nights. It should be noted, however, that some overnight visitors will spend at least part of the day following their last night of accommodation in the shire. These 'partial' visitor days have not been estimated.

No data is available for international day visitors. All estimates therefore exclude this visitor category.

In the graphed data, when a year is stated, this is referring to a financial year, as it represents the twelve months leading up to 30 June of that year. For example, any data labelled as '2019' covers 1 July 2018 to 30 June 2019, similar to a financial year.

Note: To view a larger version of this table, please refer to Appendix 2.

Table 3: Summary of changes to visitor economy 2008-2019

Factor	Year ending June 2008 (unless otherwise stated)	Year ending June 2019 (unless otherwise stated)	Growth
Total number of visitors	1,290,000	2,210,000	71%
Visitor expenditure	$354,000,000	*$776,000,000 *2018 data. 2019 data not available at time of publication.	119%
Population of Byron Shire	28,766	34,574	20%
Domestic Day Trip Visitors *	587,000	991,000	69%
Domestic Overnight Visitors	520,000	994,000	91%
International Overnight Visitors	190,000	225,000	18%
Total visitor nights (domestic and international combined)	3,117,000	5,500,000	76%

Sources: Tourism Research Australia (TRA); National and International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA. Australian Bureau of Statistics. National Institute of Economic and Industry Research (Natural Economics)

*International day trip visitor data not available.

* all data, and changes between two points of data, are subject to sample error.

When developing this strategy, it was important to note key changes the Byron Shire visitor economy has faced since the Tourism Management Plan 2008-2018 was developed.

Since 2008, the total number of visitors annually has increased by almost one million, visitor expenditure has more than doubled and visitor nights (domestic and international combined) have grown by almost 2.5 million.

The above table summarises changes in the visitor economy.

4.1 Total visitor data

Source: Tourism Research Australia (TRA); National Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA. * No data available for international day visitors.

Figure 3: Total visitors

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: In year ending June 2019, there were a total of 2.21 million visitors to Byron Shire; our highest annual visitor volume to date.

Table 4: Breakdown by visitor type

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AVERAGE
DOMESTIC OVERNIGHT	40%	29%	31%	30%	40%	37%	40%	42%	42%	39%	41%	45%	38%
DOMESTIC DAY	45%	60%	55%	60%	47%	51%	49%	48%	49%	51%	50%	45%	51%
INTERNATIONAL OVERNIGHT	14%	12%	14%	10%	13%	12%	11%	10%	10%	10%	10%	10%	11%

Source: Tourism Research Australia (TRA); National and International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA. No data available for international day visitors.

Note: To view a larger version of this table, please refer to Appendix 2.

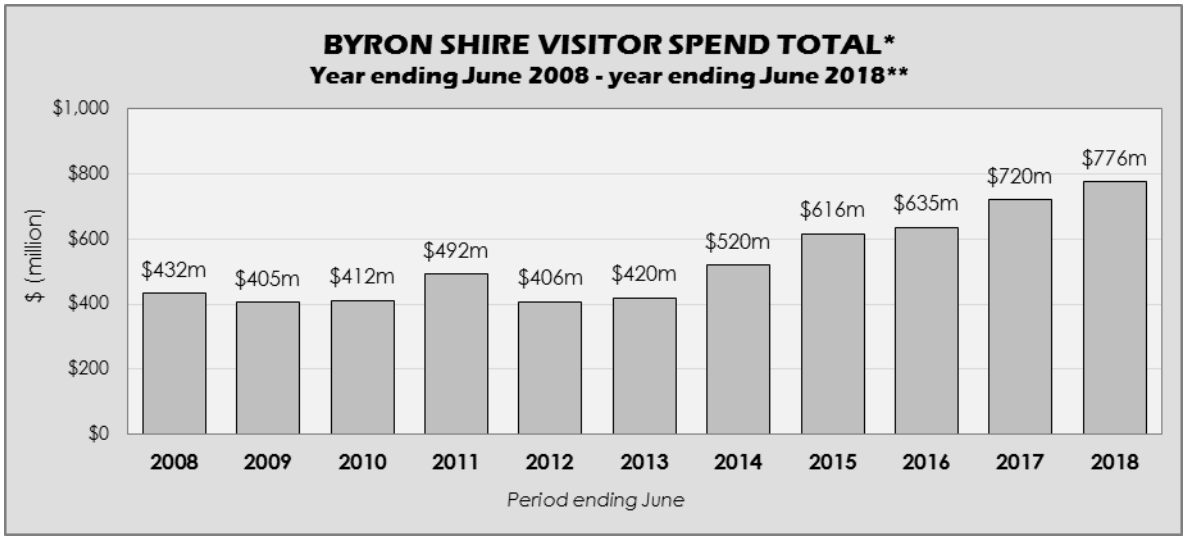
Key summary: Until year ending 2018, domestic day visitors were the largest visitor type to Byron Shire. In year ending June 2019 domestic overnight and domestic day visitors are each 45% of the visitor type breakdown.

Source: Tourism Research Australia (TRA); National and International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 4: Visitor nights

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: This graph shows the total visitor nights to Byron Shire to year ending June 2019. Total visitor nights have increased to 5.5 million in year ending June 2019; up from 3.12 million in year ending June 2008.



Source: Tourism Research Australia (TRA); National & International Visitor Surveys and TRA; Regional Expenditure Allocation Model (unpublished data. 2019 data for expenditure not available at time of publication.

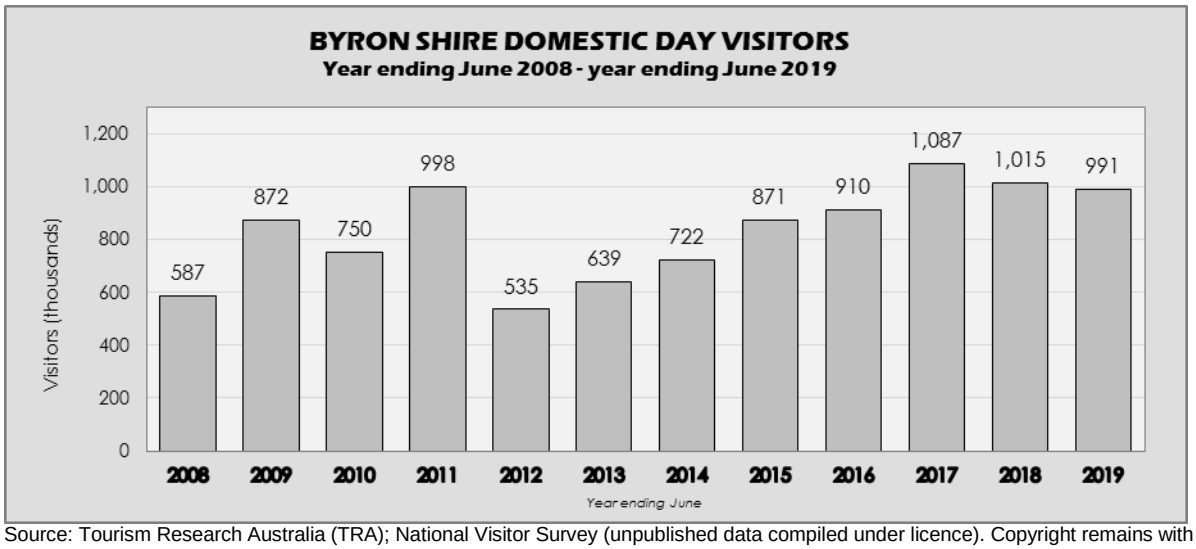
** Spend is based on a four year rolling average

Figure 5: Total visitor expenditure

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: This graphs shows visitor expenditure to year ending June 2018**.** Year ending 2018 saw a new record for tourism expenditure; with a total spend of $776 million. This figure has been steadily climbing since 2012.

4.2 Domestic day visitor data



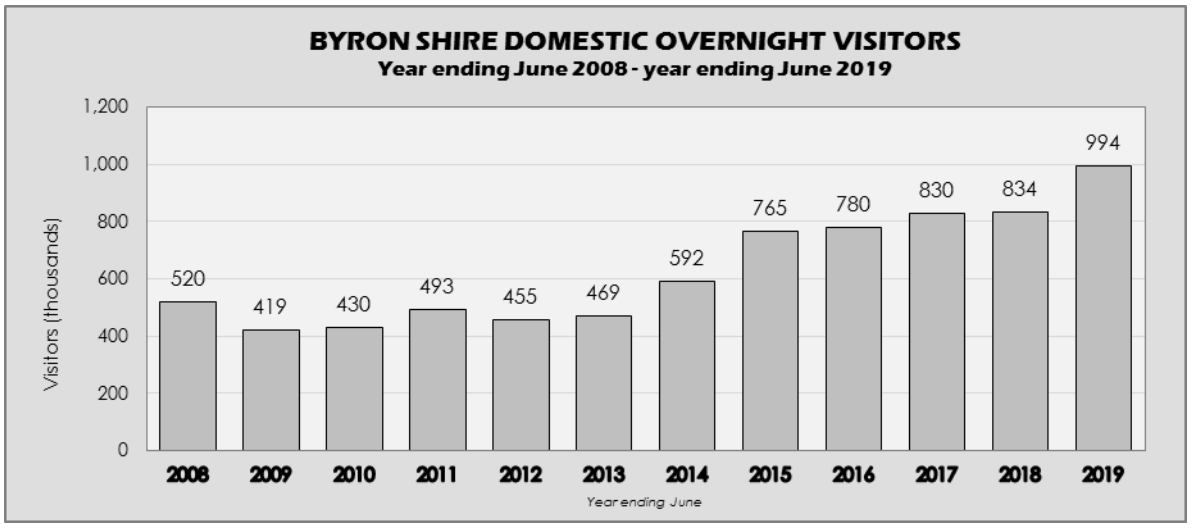
Source: Tourism Research Australia (TRA); National Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 6: Domestic day visitors

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: This graph shows the number of domestic day visitors to Byron Shire to year ending June 2019. Byron Shire hosted an estimated 991,000 domestic day visitors in the year ending June 2019, with figures showing a gradual decrease in numbers over the previous two years.

4.3 Domestic overnight visitor data



Source: Tourism Research Australia (TRA); National Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 7: Domestic overnight visitor numbers

Note: To view a larger version of this figure, please refer to Appendix 2.

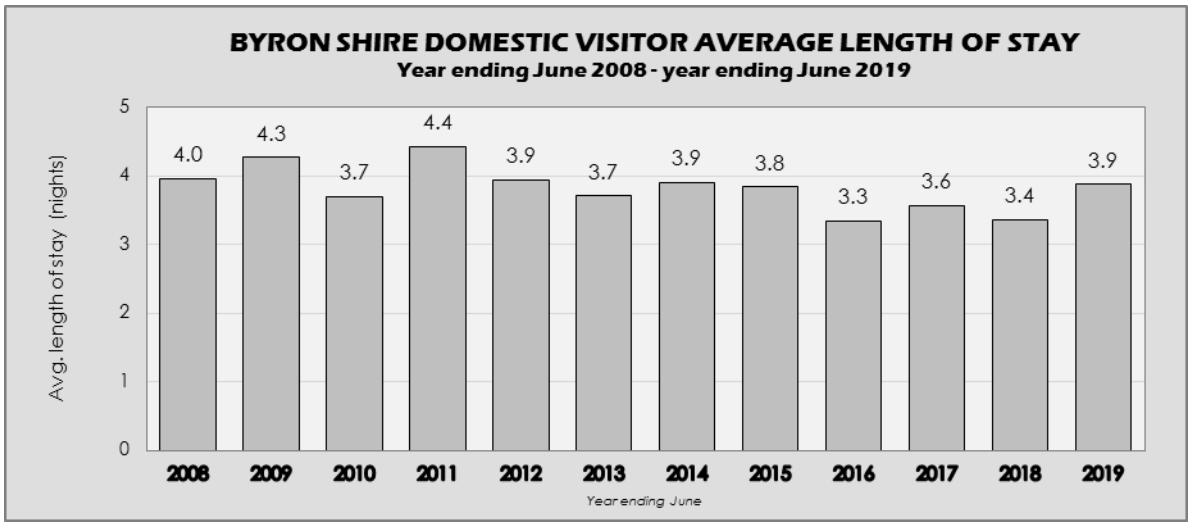
Key summary: This graph shows the number of domestic overnight visitors to Byron Shire to June 2019. An estimated 994,000 domestic overnight visitors spent at least one night in the Byron Shire in the year ending June 2019. This figure is an increase of 19.2% from year ending June 2019 compared to year ending June 2018. This is the fourth consecutive year of double-digit growth, and is a record for any 12 month period.

Source: Tourism Research Australia (TRA); National Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 8: Domestic overnight visitors - visitor nights

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: For the year ending June 2019, domestic overnight visitor nights accounted for 3.85 million of the total 5.5 million nights. This is a new record, the fourth consecutive period of double-digit growth, and is 37.6% higher than the same time period in 2018.



Source: Tourism Research Australia (TRA); National Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 9: Domestic overnight visitors - average length of stay

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Domestic overnight visitors stayed an average of 3.9 nights in year ending June 2019. This is 0.5 nights above that for the same period in 2018 and the highest since the year ending December 2014.

4.4 International overnight visitor data

Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 10: International overnight visitor numbers

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: This graph shows the number of international overnight visitors to Byron Shire to year ending June 2019. In the year to June 2019, there were 225,000 international overnight visitors. This number is an increase of 12% from the same time period in 2018 and a new record.

Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 11: International overnight visitor nights

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: This graph shows the total number of nights spent in Byron Shire by international overnight visitors to year ending June 2019. In the year ending June 2019, international visitors spent an estimated 1.65 million nights in the Byron Shire; the highest number of international visitor nights for this time period.

Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 12: International overnight visitors average length of stay

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: In year ending June 2013, the average length of stay for an international overnight visitor was 8.2 days; the longest average for this time period. The length of stay has remained relatively consistent over the past six years.

Section 5: The Present

Two surveys were conducted in order to provide further insight into the current visitor economy.

5.1 Visitor accommodation summary

In early 2019, Council completed an audit of visitor accommodation and capacity throughout Byron Shire. The last accommodation audit was conducted in 2008, when the previous Tourism Management Plan was prepared.

The major findings shown in the below tables are as follows:

1. In 2019, Byron Shire has a capacity of 22,025 bed spaces recorded across 3,325 properties, as compared with 14,061 bed spaces in 2008. This shows a growth of 57% over the past 11 years.

2. In 2019, there are 13 camping grounds and caravan parks that account for 24% of the bed spaces.

3. In 2019, the majority of accommodation is holiday houses, which now account for 40% of all bed spaces in the Shire.

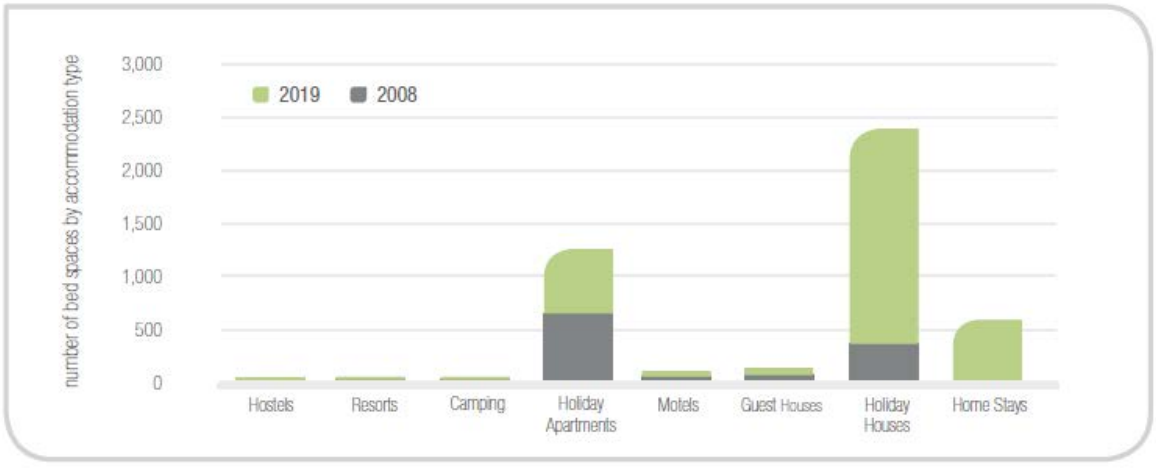
4. From 2008 to 2019 there has been a decrease in the number of bed spaces within resorts, holiday apartments and guest houses.

Table 5: Accommodation type and number of properties and bed spaces in Byron Shire from 2008 and 2019 and the % change in the number of bed spaces during this period.

Accommodation Type	Number of Properties (2019)	Number of bed spaces (2019)	Total properties % (2019)	Total bed spaces % (2019)	Number of Properties (2008)	Number of Bed Spaces (2008)	% change in the number of bed spaces by town and village from 2008 to 2019
Hostels/Backpackers	10	1751	.5	8	11	1178	32.74%
Caravan Camping	13	5318	.5	24	13	5255	1.19%
Resorts	2	800	.4	4	9	949	-15.70%
Holiday Apartments	671	2846	20	13	615	2885	-1.36%
Hotels/Motels	29	1096	.8	5	25	890	23.15%
Guest Houses	27	228	.8	1	48	335	-31.94%
Holiday Houses	1998	8836	60	40	393	2473	257.30%
Private/Home Stays	575	1150	17	5	7	96	1097%
TOTAL	**3325**	**22,025**	**100%**	**100%**	**1121**	**14061**	**56.63%**

Source: Byron Shire Council Accommodation Audit 2019

Note: To view a larger version of this table, please refer to Appendix 2.



Source: Byron Shire Council Accommodation Audit 2019

Figure 13: Number of bed spaces by accommodation type comparing 2008 with 2019 data

Note: To view a larger version of this figure, please refer to Appendix 2.

The major findings shown in Table 6 below are as follows:

1. Byron Bay has the highest percentage of accommodation properties in the shire, with 14,216 bed spaces totalling 52% of the total properties and 57% of the total bed spaces in the shire in 2019.

2. The number of bed spaces in Suffolk Park and Brunswick Heads has remained stable for the last 11 years.

3. Bangalow, Mullumbimby, Ocean Shores (which also includes the villages of South Golden Beach and New Brighton) and the Hinterland areas have shown the most growth in bed spaces over the last 11 years with increases between 200 – 300%. Most of this can be attributed to the growth in the number of holiday houses in the shire.

Table 6: Total number of properties and bed spaces in Byron Shire by area.

Town	Number of Properties (2019)	Total # of bed spaces (2019)	Total properties % (2019)	Total bed spaces % (2019)	Number of Properties (2008)	Number of Bed Spaces (2008)	% change in the number of bed spaces by town and village from 2008 to 2019
Byron Bay	1717	14216	52	57	787	10032	41.7%
Suffolk Park	350	1645	11	9	92	1507	9.16%
Brunswick Heads	78	1238	3	3	70	1204	2.82%
Bangalow	130	550	4	4	21	135	307%
Mullumbimby	148	532	4	3	14	169	214.80%
Ocean Shores South Golden New Brighton	318	1308	10	9	48	365	258.36%
Hinterland and remaining Shire	556	2536	16	15	89	649	290.76%
TOTAL	**3325**	**22025**	**100%**	**100%**	**1121**	**14061**	**56.63%**

Source: Byron Shire Council Accommodation Audit 2019

Note: To view a larger version of this table, please refer to Appendix 2.

5.2 Tourism product inventory

In early 2019 Council completed an audit of tourism products throughout the shire. This was also conducted in 2008, when the previous Tourism Management Plan was prepared.

It has been identified that a tourism product inventory audit needs to take place every 5 years, with a review of categories used for each audit.

To provide the current situation, a snapshot of the 2019 audit is as follows:

Table 7: Tourism products in Byron Shire in 2019

Note: To view a larger version of this table, please refer to Appendix 2

Byron Shire Tourism Products – 2019	Amount in 2019	% of Total in 2019
Health and Wellness	161	26%
Restaurants with evening trade	137	22%
Events and Festivals	95	15%
Cafes (daytime trade only)	78	12%
Performance and Rehearsal Spaces	74	11%
Water Sports	21	4%
Pubs and Clubs	18	3%
Beaches	16	2%
Galleries	14	2%
Community Markets	12	2%
Theatre and Cinemas	5	1%
Total*	**631**	**100**

- Excludes retail, takeaway foods and service. Categories for future audits to be reviewed.

The top 3 tourism product categories in 2019 include are health and wellness products, restaurants with evening trade and events and festivals.

5.3 Current situation with the visitor economy

The growth in the visitor economy has brought significant changes, including but not limited to:

Short-term rental accommodation

With the introduction of online booking platforms, owners can list and self-manage their property for visitor accommodation. This has introduced issues around impacts on infrastructure, traffic and waste, noise complaints, upward pressure on house prices and the transition of housing stock from long term rental to short term.

Southern Cross University has recently published a report on the impacts of Airbnb to the community; see Bibliography for link to report.

Airport capacity

Byron Shire is located between two of the fastest growing airports in Australia; Ballina Byron Gateway Airport and the Gold Coast Airport. The increase in the airports' capacities is reflective of the shire and surrounding regions' growing visitor economies.

Population Growth in South-East Queensland

The population in South East Queensland increased from 2.9 million people in 2008 to 3.5 million in 2018, contributing to rising day trip visitor numbers to the Byron Shire.

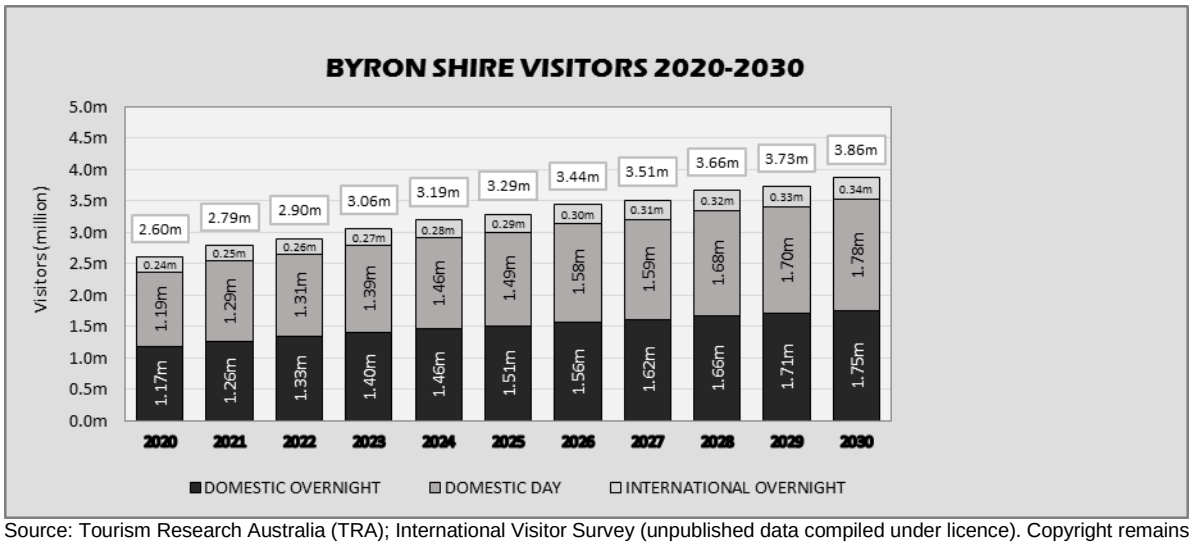
Section 6: The Future - Forecasting Our Visitor Economy To 2030

This section provides detailed forecasting about Byron Shire's visitor economy over the next decade (2020-2030), taking into consideration if current trends continue.

The forecast methodology is the result of a detailed examination of relevant Byron Shire and market data, expenditure trends as well as forecast scenarios which include simple trend-various historic growth rate projections and market share based projections. This process involves consideration of demand side analysis to find out how much demand exists and can include destination data-mining.

Sample sizes for Byron Shire have been examined over an extended time series using sample sizes well above the minimum required. For data sets, a graph will be followed by key points. Forecasts are currently presented in calendar years.

6.1 Total visitor numbers forecast 2020-2030



Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 14: Total visitor numbers forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Total visitor numbers are expected to reach 3.86 million in 2030. Domestic visitors are forecast to continue to account for more than nine out of every ten visitors.

Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 15: Total visitor nights forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Byron Shire can expect around 8.5 million visitor nights in 2030. It is anticipated that overall visitor nights will steadily increase and domestic overnight visitors will continue to outweigh international visitor nights. Over the forecast period, this averages out at 65% domestic; 35% international visitor nights.

Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 16: Total visitor spend forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Visitor spend is expected to be at $1,623 million in 2030 which is more than double the visitor expenditure of 2018 (Figure 5). The visitor spend profile is dominated by domestic visitors (this would also be the case if an estimate for international day visitor spend were added). Domestic overnight visitors account for an average 89% of the $1.1b average visitor expenditure.

6.2 Domestic day visitor forecasts

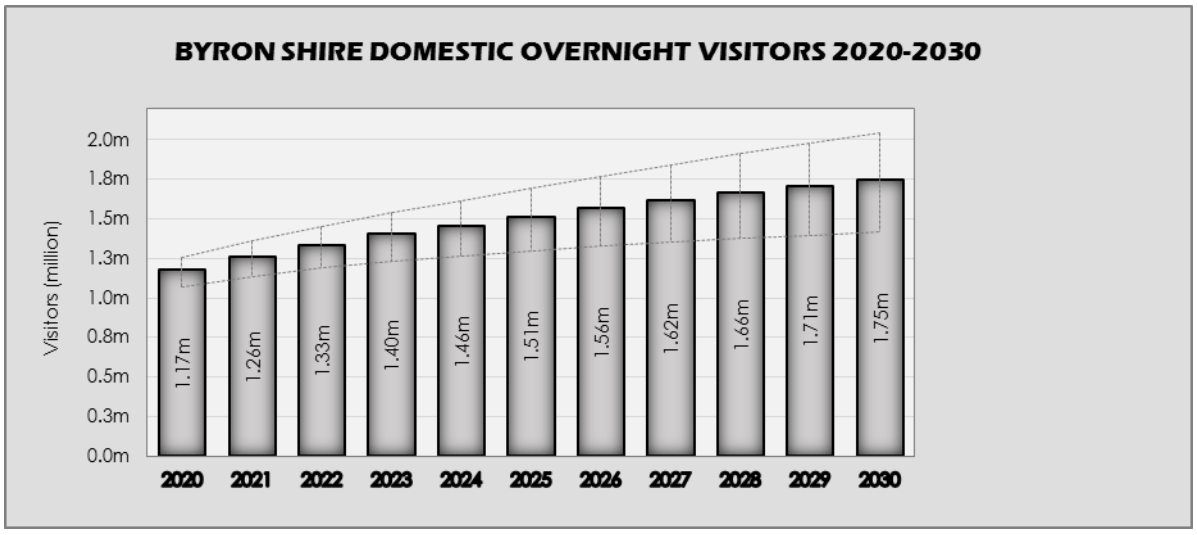
Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 17: Domestic day visitor forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: If this growth rate occurs, in 2025, Byron Shire will host almost 1.5 million domestic day visitors. By 2030, the total of 1.78 million would be almost 600,000 more domestic day visitors than forecast for 2020.

6.3 Domestic overnight visitor forecasts

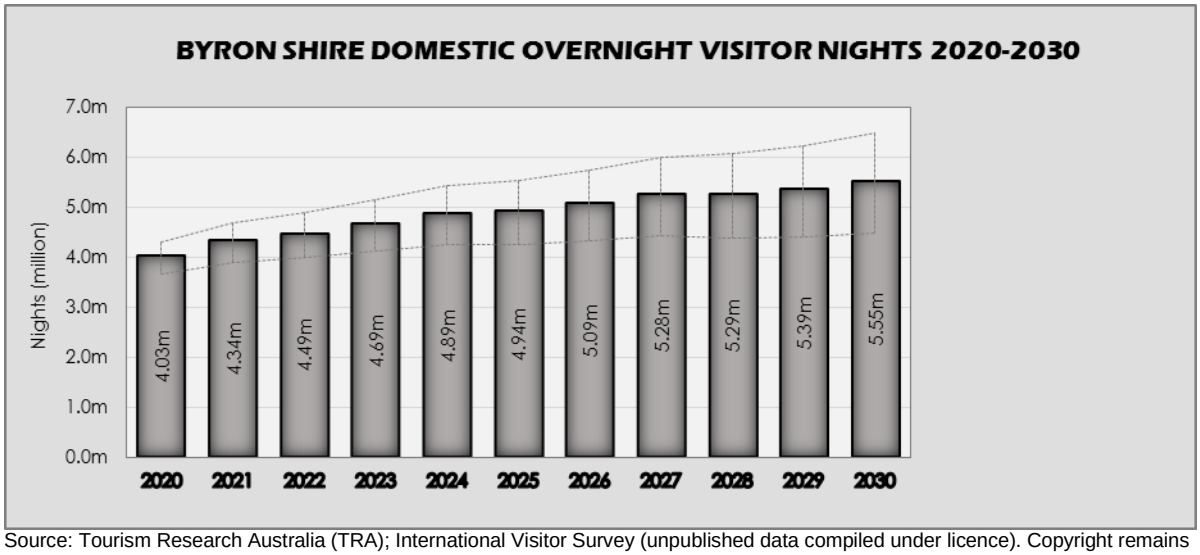


Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 18: Domestic overnight visitor numbers forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: By 2030, a total of 1.75 million domestic overnight visitors would be 580,000 more than forecasted for 2020 (1.17 million). This graph represents an average annual growth rate of 4.1% (compounding).

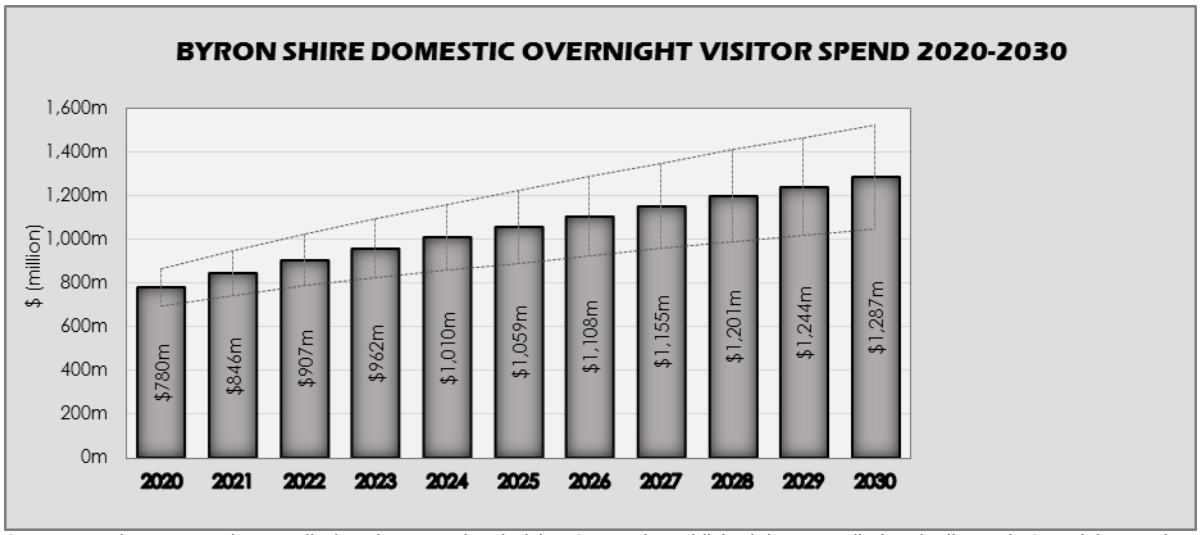


Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 19: Domestic overnight visitor nights forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Domestic overnight visitor nights are forecast to increase by more than 1.5 million nights between 2020 and 2030; from 4.03 million nights in 2020 to 5.55 million nights in 2030.



Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 20: Domestic overnight visitor spend forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: The domestic overnight visitor spend forecast translates into an average of $1.05 billion per year (with $1 billion exceeded for the first time in the year 2024).

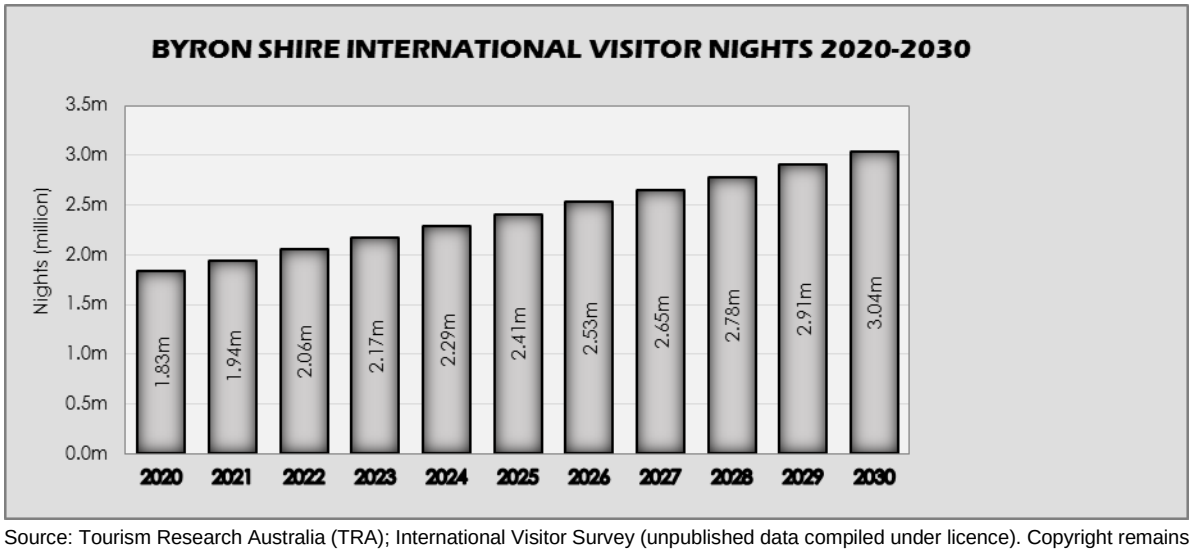
6.4 International overnight visitors forecast

Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 21: International overnight visitor numbers forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Over the period 2020-2030 it is anticipated that 240,000 international visitors will spend at least one night in the Byron Shire in 2020, increasing to 340,000 in 2030. Of all visitor categories, international visitors are subject to the largest number of factors that could influence this volume. These include economic factors (such as exchange rates, natural disasters and airfares), and a wide range of other factors including political, perceptual and attitudinal).

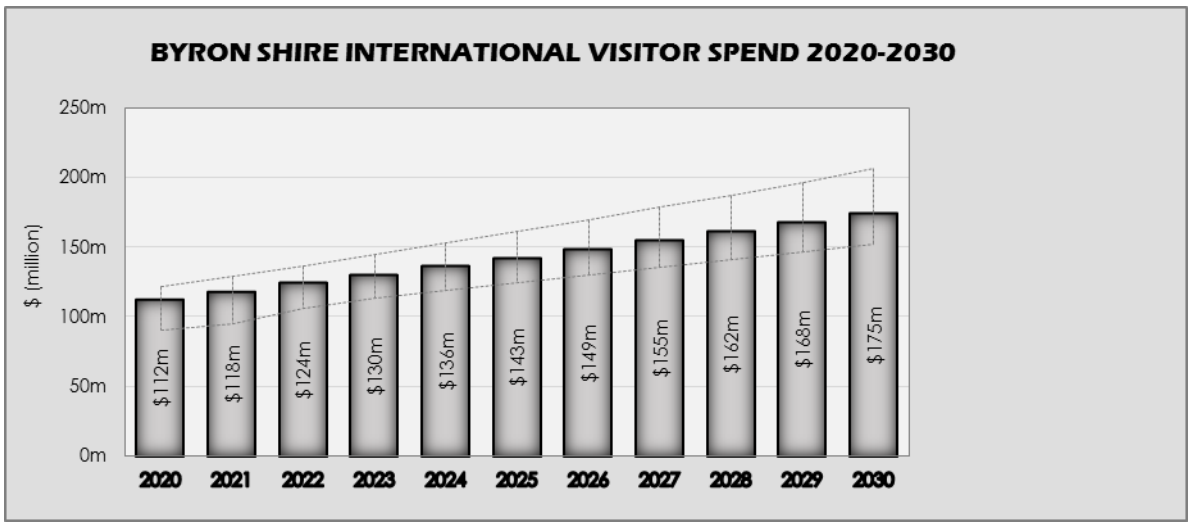


Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 22: International overnight visitor nights forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: Based on the continuation of long term trends in average length of stay, 2 million visitor nights would be exceeded in 2022 and 3 million visitor nights would be exceeded in 2030.



Source: Tourism Research Australia (TRA); International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA.

Figure 23: International overnight visitor spend forecast 2020 - 2030

Note: To view a larger version of this figure, please refer to Appendix 2.

Key summary: If long term spend per visit trends continue, international overnight visitors would spend an average of $143m each year ($39m more than the total in 2018). It would not take much of an increase in this growth rate for the average to exceed $160m in each year.

Section 7: Sustainable Visitation Strategy

During the engagement and consultation stage of developing this strategy, six themes emerged as a priority for managing a sustainable tourism future for Byron Shire.

This section will explore each theme in turn. For each, we will start with an overview of the background to the issue. This will be followed by some relevant case studies, providing real-life examples of how this theme is important.

Vision, values and themes

The vision for the Byron Shire Sustainable Visitation Strategy 2020-2030 is:

"Byron Shire welcomes visitors and supports a visitor economy that cares for and respects our residents, creates low-impact visitor experiences, protects our natural environment, celebrates our cultural diversity and shares our social values".

This vision is underpinned by the following values and principles as expressed by our community through this strategy's engagement process:

1. **Respect** for community, nature, others and self
2. **Appreciation** of culture and social diversity
3. **Conservation** of the natural environment and biodiversity
4. **Diversity**, welcoming and acceptance
5. **Balance** of economic, social and environmental impacts
6. **Cultural respect** for Indigenous history and spirituality
7. **Live** in harmony and safety
8. **Lifestyles** of those who are active, healthy and sustainable
9. **Education**, enlightenment, searching and problem solving
10. **Balance** between laid-back/relaxed and engaged/activist

The six themes are:

1. **Leadership and Destination Management**
2. **Repositioning Byron Shire**
3. **Culture**
4. **Events**
5. **Transport, Infrastructure and Open Spaces**
6. **Planning for Visitor Accommodation**

For each theme, some background is provided followed by local and international, illustrative case studies. Strategies and actions that have been identified will be listed then each theme will finish with a Table to show which compliance criteria fit with the theme, as defined by the Global Sustainable Tourism Council (GSTC).

Theme 1: Leadership and Destination Management

Background

Destination management is a holistic process that ensures tourism adds value to the economy, social fabric and ecology of our communities. Tourism can be an economic driver, generating jobs and contributing vibrant lifestyle benefits to our communities.

Equally, tourism needs to be managed to ensure that it leaves a positive legacy for current and future generations. Crisis and risk management, climate change adaptation as well as opportunities for jobs (including for the region's youth) must all be considered and managed.

Importantly, the tourism sector needs to ensure that it is considered in the broader context of regional development, and that it is recognised for its overall contribution and economic value to the region.

Being a leading sustainable tourism destination involves collaboration with industry, local government and the community.

The role of local government in tourism is to support, facilitate, and help build the capacity of the local tourism industry in order for the sector to be sustainable and operate in harmony with the community's values.

Our local tourism industry association, Destination Byron, and the tourism work of local Chambers of Commerce and other volunteer organisations have made many improvements on tourism in their respective towns and villages. However there is currently no overarching unified group that represents industry, community, government and key stakeholders.

By creating a governance model to assist with implementing the Sustainable Visitation Strategy, Council will be collaborating with industry, stakeholders, visitors and the community to lead sustainable tourism management at a strategic level.

Funding

Effective leadership in destination management ensures there is adequate funding for implementation. During the community engagement stage of developing this strategy, several funding options were discussed:

- Council's operational funds - these are rate base limited
- Revenue from paid parking - there has been a review as to current paid parking locations and potential future locations as well as potential charges
- Voluntary Visitor Fund - this is currently being explored, however currently the majority of industry is not supportive of this initiative
- Grants – dependent on programs and funding available
- Stakeholder partnerships – dependent on priorities and capacity
- Tourism Levy – this is a Special Rate Variation and, due to the current funding provided by state and federal government, this is not a likely option, however could be explored again in the future.

It is important to note the community strongly supports a bed tax in Byron Shire. This falls under State Government Legislation. To date, the NSW Government has not supported Council's request to introduce a bed tax in Byron Shire.

There needs to be further investigation of possible methods for additional income to support the implementation of the SVS.

The natural environment

Many visitors support environmentally responsible tourism, and most feel they are already environmentally conscious and respectful.

Visitors show a strong preference toward natural landscapes attractions and experiences over man-made experiences when visiting the Shire. Increasingly, there is interest in experiences that are back-to-basics, relaxing, simple and nature driven.

Our consultation reinforced that many visitors also want to protect the natural beauty and untouched environment. Visitors want to be made aware of their responsibilities when visiting a place of natural beauty and be educated about sustainability and the environment.

They are also interested in environmental volunteering when visiting Byron Shire. This presents an opportunity for an increased focus on conservation and the environment, with activities for visitors that immerse them in the conservation process and allow them to contribute to the sustainability of the area. Visitors told us that they want to 'make a difference'.

Many residents, however, see visitors as disrespectful toward the environment and have voiced the need for an increase in education, signage, infrastructure and enforcement, as well as the need for tourism businesses to reinforce environmentally friendly and sustainable messages.

Case studies

Case study 1a: Effective leadership model - St. Kitts Sustainable Destination Council, St. Kitts and Nevis - West Indies

In 2005, the St. Kitts and Nevis government, in West Indies, shut down the last historic sugar plantation, which had been running for hundreds of years. Instead, they focussed on tourism as the primary economic driver for the island.

With just over 360,000 annual visitors in 2005, St.Kitts and Nevis were on track to welcome over 1 million visitors in 2016. With such a quick rise in visitation, St Kitts and Nevis realised the need to plan for sustainable growth of the tourism sector in order to avoid potential negative impacts to the environment and cultural heritage (common issues resulting from poor destination management).

Since 2012, the St.Kitts Ministry of Tourism has partnered with Sustainable Tourism International to support sustainable destination management on the island. The aim was to achieve the common agenda of improving lives and protecting places through travel and tourism. To this end, the Ministry created the 'Pro-People, Pro-Planet' tourism strategy.

To realise this plan, the St. Kitts Sustainable Destination Council (SDC) was established as an advisory body to the Ministry of Tourism.

Initiatives led by the SDC are holistic, focussing on sociocultural, economic and environmental sustainability. Membership includes stakeholders from both outside and within tourism to ensure total cooperation. The SDC's early intervention approach of starting environmental education in primary school is already changing the way locals think.

Thanks to the SDC's commitment, 80 per cent of residents believe tourism is more positive than negative.

This case study reinforces how important it is for Byron Shire to reinstate an advisory group so that industry, key stakeholder organisations and the community can work together to deliver the Sustainable Visitation Strategy and establish Byron Shire as a leading sustainable tourism destination.

Case study 1b: Environmental volunteering - Trees for Travellers - Kaikoura, New Zealand

Trees for Travellers is a unique project, managed by Innovative Waste Kaikoura Ltd. The aim is to increase the biodiversity of Kaikoura by encouraging visitors to buy a New Zealand native tree, which they can then plant in reserves in and around Kaikoura. By buying a tree, visitors are helping return trees and bird life to Kaikoura township and also make a contribution to offsetting the greenhouse gas emissions created in their travels.

Visitors are emailed the GPS coordinates of the tree so they may return again to visit the location and maintain a connection with the destination.

By encouraging volunteer tourism initiatives, visitors are connected with local environmental groups and are given the opportunity to display environmentally responsible behaviour.

Strategies:

1. Position Byron Shire as a leading sustainable and environmentally responsible tourism destination.

2. Investigate alternate methods to secure additional revenue streams from government and visitors to support the implementation of the SVS.

Actions:

1. Develop, in partnership with industry and government, a multi-year action plan and budget to implement the SVS.

2. Continue to strengthen strategic partnerships to drive sustainable tourism leadership in the local area and Northern Rivers region as a whole.

3. Work with government agencies to better inform visitors and industry on communication of climate change adaptation, crisis and emergency response plans.

4. Improve career and education pathways in tourism for youth and local residents by working with education and training providers and industry.

5. Develop a governance model to assist with implementing the Sustainable Visitation Strategy.

6. Investigate the opportunity to design a Byron Shire Eco Check program to assist tourism businesses implement environmentally friendly and sustainable business practices.

7. Encourage and work with local environmental groups to develop volunteer tourism initiatives

8. Implement and review approved funding options annually

GSTC Compliance Criteria:

A1 Sustainable destination strategy

A2 Destination management organisation

A5 Climate change adaptation

A11 Sustainability standards

A12 Safety and security

A13 Crisis and emergency management

B2 Local career opportunities

B3 Public participation

B4 Local community opinion

B8 Support for community

C3 Visitor behaviour

D1 Environmental risks

D2 Protection of sensitive environments

D3 Wildlife protection

D4 Greenhouse gas emission

D5 Energy conservation

D6 Water management

D7 Water security

D8 Water quality

D9 Wastewater

D10 Solid waste reduction

D11 Light and noise pollution

D12 Low-impact transportation

Theme 2: Repositioning Byron Shire

Background

Best practice destinations establish a clearly defined destination brand and image to promote the destination and encourage product development that attracts the desired visitor markets. This can be created and implemented through a strategic communications and repositioning strategy.

One of the key deliverables from the Tourism Management Plan 2008-2018 was to build a tourism brand for the whole of Byron Shire.

With extensive engagement, the 'Don't Spoil Us, We'll Spoil You' brand was created in 2012. The premise behind the brand was to attract the right types of visitors by promoting positive visitor behaviour expectations and the outcome of such positive behaviour. The message was that, by respecting Byron Shire, the community and visitors can maintain a vibrant and pristine destination for years to come.

On a larger scale, Destination NSW, Tourism Australia and industry create and market the brand and image of Byron Shire to domestic and international markets. Byron Shire Council does not control the image or messaging of the Shire internationally and domestically, however, would like to influence messaging and influence visitor behaviour. This would be through a Council-driven campaign to reposition Byron Shire as a sustainable and environmentally responsible tourism destination.

During engagement, the community stated it was a major concern that Byron Shire is not influencing the message to visitor markets and it wants to see ongoing communications and behaviour change programs fully funded with recurrent funding.

A Council-led strategy for Byron Shire would endeavour to change the visitor mix, manage visitor behaviour and attract visitors who respect our community and environment, stay longer, are low impact, and want to explore various towns and villages within the Shire. These are the visitors we want to attract; those who share our community values.

Community engagement highlighted the following industries as a focus for product development and visitor attraction. These industries reflect the community's values and will attract the right type of visitors:

- arts and creative industries
- Indigenous culture
- wellbeing and health retreats
- nature-based tourism
- business events and conferencing,
- food experiences
- agritourism
- volunteer tourism

- eco-tourism.

Nature-based tourism development in NSW National Parks and Wildlife Service

As nature-based tourism develops and the market becomes more sophisticated, experiences must meet increased expectations. Visitors seek to be engaged on multiple levels through unique quality offerings and itineraries. These positive experiences then encourage further visitation.

Visitors to national parks are seeking quality short and multi-day walks, adventure activities such as mountain biking, and on-park accommodation, including camping. In addition, there are also higher expectations for the experience to have enabling facilities including toilets, rest areas, car parking and sealed roads.

Visitor Information Centres

The shire's two visitor information centres, in Brunswick Heads and Byron Bay Town Centre, are touchpoints that provide visitor information, assistance and advice to better inform and educate visitors prior to arrival and in destination.

In 2017, Council secured $145,000 in funding from the Tourism Development Driver Infrastructure Fund to assist the Byron Visitor Centre to improve its visitor information experience and community services, including a renovation of the building and install best-practice visitor servicing technology and information.

The renovation also included appointing an on-site Council customer service officer to assist residents and ratepayers in accessing Council services.

Brunswick Heads Visitor Centre has also undertaken its own refurbishment at 7 Park Street, Brunswick Heads.

Whilst it is acknowledged that the two Visitor Centres play a significant role in providing quality information to visitors, research has shown a decline in the amount of visitors using the centres over the last 10 years and also demonstrates the visitor economy is shifting toward technology, social media and mobile visitor information services.

As part of the work from the previous Tourism Management Plan, both a Byron Shire and regional Visitor Services Strategy were developed. Many actions within these strategies have been implemented. It is recommended these strategies be reviewed in line with future visitor trend.

Case Studies

Case study 2a: Collaborative branding campaign - South Coast of New South Wales, Australia

The 'Unspoilt' campaign was a whole of South Coast collaboration. In partnership with Destination NSW, $600,000 in joint funding was raised by industry, Sapphire Coast Tourism and Bega Valley Council to launch a collaborative branding campaign.

The South Coast's 'Unspoilt' campaign is a great example of industry, local government and state government collaboration to strengthen the brand and image of an area and over time change behaviour, yield and the visitor economy.

Case study 2b: Repositioning Amsterdam as a tourism destination - Amsterdam, Holland

Back in 2013, the city of Amsterdam decided to consolidate its marketing agencies and work with the not-for-profit organisation amsterdam&partners, to create a brand with the goal of creating a better reputation for the city and, in turn, try to attract a different type of visitor. They sought to attract visitors who stay longer, spend more and take in the city's less iconic attractions.

According to Mr. Mulder from amsterdam&partners, residents were complaining about some types of visitors causing nuisance. "So we started focussing on not attracting more visitors but the right type of visitor," he says. "Those that would stay longer, have cultural interests, visit the city for the city itself, and not just to be coming in for a one-night bachelor party, for instance."

The brand, 'Luxury Amsterdam' was created. Commerce, creativity and innovation were the key brand messages. This campaign was very successful and, over time, changed visitor markets and behaviour. The Netherlands Board of Tourism and Conventions says, "We've come a long way. Still, our main challenge is to continue to step out of that previous image and focus more on culture, quality, and luxury."

Amsterdam has similar issues to Byron Bay. Both are seen as party-towns and this, in turn, negatively impacts neighbouring towns and villages. In developing a strong marketing campaign with clear messages, the Amsterdam Strategy is shifting the perception of Amsterdam and attracting their desired visitor.

By developing a strategic communications and repositioning strategy (including product development and behaviour change), Byron Shire will shift the image of a party and nightlife destination to a more nature-based, alternative, health and wellbeing destination, attracting like-minded visitors with shared community values.

Strategy:

1. Create a communications and repositioning strategy to attract visitors with shared community values.

Actions:

1. Proactively engage with key stakeholders and agencies such as Tourism Australia, Destination NSW, Destination North Coast, and industry to change to values-based messaging for Byron Shire.

2. Collaborate with industry to encourage tourism product and visitor experiences that complement the brand, values and image of Byron Shire.

3. Continue to lead, educate, undertake and share tourism research, including trends, opportunities, visitor satisfaction and information.

4. Create a 'Welcome to Byron Shire' program for visitors, and a Tourism Toolkit for industry, both aiming to lift customer service standards, provide product, destination and indigenous heritage information, and specify behaviour expectations.

5. Develop, through collaboration, a whole of destination tourism wayfinding and signage strategy.

6. Work with Byron Bay and Brunswick Heads Visitor Information Centres to improve the delivery of visitor information in line with future trends.

7. Review and update the Byron Shire Visitor Services Strategy.

8. Lobby Destination NSW and Tourism Research Australia for regular inclusion of Byron Bay in the International Day Visitor Survey.

9. Undertake an accommodation and tourism product inventory audit every five years.

10. Undertake a review of the visitor economy forecast 2020 – 2030 annually

GSTC Compliance Criteria

A1 Sustainable destination strategy

A2 Destination management organisation

A3 Monitoring

A4 Tourism seasonality management

A10 Visitor satisfaction

A14 Promotion

B1 Economic monitoring

B2 Local career opportunities

B3 Public participation

B4 Local community opinion

B6 Tourism awareness and education

B8 Support for community

C1- Attraction protection

C2- Visitor management

C3- Visitor behaviour

C4 Cultural heritage protection

C5 Site interpretation

Theme 3: Culture

Background

Byron Shire has a dynamic culture that is unique and attracts new residents and visitors each year. Byron Bay and its hinterland are internationally renowned for community, creativity and connection to place.

In 2016, Regional Australia Institute (RAI) revealed that Byron Shire was the top creative hotspot outside metro areas based on the percentage of professionals employed in creative industries. With this growth comes the challenge of meeting the needs of a diverse community. This includes access to, and support for, local services and facilities and helping to ensure other levels of government provide the shire with education, health, transport and other essential support services.

Culture in Byron Shire includes expression of the history, heritage, customs, arts, recreation, sport, creativity and values of the community. The community is diverse and colourful, which is why people love to visit. Each town, rural village and their localities have their own distinctiveness and mix of cultural values; embracing both traditional and alternative lifestyles and philosophies. There is strong respect for Aboriginal heritage and custodianship and the value of understanding our link to country.

Much of the cultural expression that occurs within the Shire is fluid and organic, with limited input from Council. There are hundreds of events and activities from large scale and nationally renowned festivals through to small offerings that contribute to the richness and vitality of the Shire.

Council acknowledges the significant and deeply important cultural contribution of Aboriginal people to our community. This was also echoed during the engagement process for the development of this strategy. Traditional owners retain a strong connection to country. They actively care for and connect with country. Building opportunities for respectful and mutually beneficial opportunities to enhance visitor experiences should be undertaken sensitively with Aboriginal stakeholders from the outset, with cultural heritage protection and maintenance at the core.

Council is in the process of developing an Arts and Cultural Policy that will outline its role in relation to cultural outcomes. Council provides public art, as guided by the Public Art Strategy, and supports the Lone Goat Gallery, a community based gallery that provides a high quality exhibition program that includes emerging practitioners as well as nationally renowned artists.

We recognise that cultural development cannot take place in isolation; it is most effective where there is collaboration, collective action and shared aspirations between Council and the community.

Case studies:

Case study 3a: Ensuring visitors acknowledge the cultural and Aboriginal significance of the land - Uluru-Kata Tjuta National Park, Australia

Heritage sites are facing the new challenge of ‘Instagram fame’ seekers.

Uluru is a sacred place for the Anangu people, whose sacred law states: “You don’t own the land; the land owns you.”

On 26th October 2019, a full 34 years to the day since Uluru was handed back to the traditional owners, climbing Uluru was finally stopped.

Uluru-Kata Tjuta National Park faced many visitor behaviour management challenges while climbing was allowed; dealing with expectations, communicating a different world view, promoting respectful behaviour, safety concerns (there have been 37 confirmed deaths since the 1950s), and communicating alternative experiences that reflect the ideal of 'listening, not climbing'.

It is important that Byron Shire develops visitor experiences that celebrate the Shire's culture and direct visitors away from sacred Aboriginal sites.

Council, together with the National Parks and Wildlife Service, can take a strong leadership role in protecting the land by working to ensure visitors are not illegally camping, dumping rubbish and contributing negatively to the local culture.

Strategies:

1. Protect and enhance the indigenous, heritage, artistic and cultural diversity of Byron Shire

2. Preserve the living culture and traditions of Byron Shire.

Actions:

1. Support Council's Social and Cultural Planning in the development of an Arts and Cultural Policy that defines the role of Council in relation to protecting and enhancing the cultural vitality of the Shire.

2. Promote cultural expression through local events.

3. Consult local Aboriginal stakeholders in relation to opportunities to enhance visitation experiences while maintaining and protecting cultural heritage sites and places.

GSTC Compliance Criteria

A7 Planning regulations

A8 Access for all

A14 Promotion

B5 Local access

B7 Preventing exploitation

C1 Attraction protection

C2 Visitor management

C3 Visitor behaviour

C4 Cultural heritage protection

C5 Site interpretation

Theme 4: Events

Background

Due to our diverse natural environment, our laidback vibe, and our creative scene, Byron Shire is a preferred regional destination for weddings, business events and conferences, as well as festivals, events and filming. All these activities bring large numbers of visitors to the region.

In the 2018 calendar year, Byron Shire Council approved or supported around 90 events over 170 event days and with over 372,000 attendees.

To put this in perspective, event attendees represent more than ten times the shire's resident population. This does not include events which occur in already approved venues or those events, weddings or filming that are not approved by Council or that Council has not been notified of.

Events provide a wide range of jobs and other economic benefits to our small and medium sized enterprises. They are an integral part of the cultural fabric of the shire and the buoyancy of the local economy. The events industry plays an important role in contributing to our destination image, visitor experience and length of stay. Events potentially help overcome seasonal visitation troughs.

The economic impact of these events is difficult to measure; however in 2018 our six biggest events had an estimated economic impact of over $100 million.

In developing an events strategy, Council can coordinate and manage the shire's weddings, business events and conferences, festivals and events as well as research their economic impacts, and collect and analyse demographic, marketing and visitor satisfaction data.

Festivals, Events and Filming

Over the last few years there has been a significant increase in the number of filming requests in Byron Shire. Guidelines are required to ensure all filming requests are complementary to the brand and image of Byron Shire and ensure a positive reinforcement of community values.

Business Events and Conferencing

In 2017, Byron Shire Council partnered with industry to secure funding from Destination NSW to re-launch Byron Shire to the national and international conferencing marketplace as a top-of-mind destination for business events, conferencing, meetings and incentive trips across a variety of accommodation types and venues that provide a world class conferencing experience in Byron Shire. Part of this funding was to establish the Byron Business Events Bureau (BBEB), funded and led by Byron Shire Council and industry.

In its first year, the BBEB worked with local industry and gained more than 5005 conferencing nights, generating $5.5 million of revenue into the local economy. Due to insufficient funds, the BBEB could not be continued in its current format.

In 2018, Destination North Coast formed a Business Events branch to secure conference and businesses events for the whole of the North Coast, including Byron Shire.

Weddings

There are an estimated 600-700 weddings in the shire annually, and up to 20 per weekend in peak wedding season (spring and autumn). This provides an estimated 392 direct full-time equivalent (FTE) employees and 314 indirect FTE employees, which contributing $54 million to the local economy.

Due to the volume and impacts of weddings in the shire, particularly those held in the rural hinterland, Council is taking a more active approach to managing weddings and events in rural areas, by investigating changes to planning controls that will provide an approval mechanism for weddings and events on rural land.

More than one hundred people expressed their views on rural weddings and events during the public exhibition of the planning proposal for rural weddings and events in 2018-19.

Based on those views, Council is implementing a 'rolling approval' process, whereby rural land owners will be able to obtain a three-year approval to host up to 20 weddings or other events per year, provided that they can demonstrate that their site is suitable for such use and that the events will not disturb the neighbours or result in other environmental impacts.

Along with positive impacts, events can also bring negative impacts, such as noise and environmental pollution, antisocial behaviour, and a burden on existing services and infrastructure. Unlicensed events and activities add to this mix with the need for compliance action.

Our community and visitors want event holders to be accountable for guest behaviour and impacts, and recommend there be more compliance and strategy around how events are managed and run in Byron Shire. The challenge is to manage industry, visitor and community expectations while adhering to changing regulatory and legislative requirements relevant to the industry.

A strategic shire-wide events strategy could consider items such as:

- Event attraction and retention – attract and retain events that strengthen the Byron Shire identity and economy with a low impact on the local environment and community.
- Process improvement – assist event organisers navigate regulatory and compliance requirements related to event production.
- Community engagement – promotes the value of events to the overall fabric of the community and garners support and acceptance for best practice events in the shire.
- Best practice – support and enable event organisers to embed best practice models into their events (eg: waste management, sustainability, community consultation, site infrastructure, corporate social responsibility).

Case Studies

Case study 4a: Sustainable Food and Wine Event - Orange F.O.O.D Week - Orange NSW, Australia

Orange F.O.O.D Week 2019 is the first sustainable food and wine event in Australia that has sought to comply with global-standard ISO 20121 (Event Sustainability Management Systems).

The organising team of Australia's longest running regional food festival aimed to showcase excellent environmental stewardship as an example to Australia's food and produce event sector.

By Council developing guidelines and education in line with a framework such as ISO 20121 Council can support event organisers to deliver sustainable events to a globally recognised standard.

Case study 4b: Local project for behaviour change - Taking Care of Bruns – Brunswick Heads NSW, Australia

The Brunswick Heads Visitor Centre partners with Falls Festival for the 'Taking Care of Bruns', which takes place before, during and after the festival every year. The purpose of the project is to mitigate some of the effects of the festival on the amenity of the town, particularly as it is held during the already busy New Year period.

The program conveys positive messaging to visitors on expected behaviour, and promptly addresses any concerns or anti-social behaviour that may arise.

This program has resulted in a decrease in local complaints and is a model for providing a solid foundation for events and community working collaboratively.

Strategy:

1. Improve the sustainability, coordination and management of festivals, business and leisure events, weddings and filming in Byron Shire.

Actions:

1. Improve coordination and management of events by developing a shire-wide event strategy.

2. Work with industry in the region to raise the quality of events, and support them to educate their attendees / participants in expected behaviour and community values in Byron Shire.

3. Work with key stakeholders and agencies on regional and national event policy and frameworks.

4. Undertake research into event sustainability best practice and consider opportunities for Council to be a leader in this field, driving towards net zero emissions for the industry.

5. Continue to work with agencies and industry to develop Byron Shire as a leading business events and conferencing destination.

GSTC Compliance Criteria

A3 Monitoring

A4 Tourism seasonality management

A8 Access for all

A12 – Safety and security

A13 – Crisis and emergency mgmt.

A14 – Promotion

A11 – Sustainability standards

B1 Economic monitoring

B2 Local career opportunities

B3 - Public participation

B4 Local community opinion

B5 Local access

B8 Support for community

B Supporting local entrepreneurs and fair trade

C1 Attraction protection

C2 Visitor management

C3 Visitor behaviour

D1 Environmental risks

D2 Protection of sensitive environments

D3 Wildlife protection

D4 Greenhouse gas emissions

D5 Energy conservation

D6 Water management

D7 Water security

D8 Water quality

D9 Wastewater

D10 Solid waste reduction

D11 Light and noise pollution

D12 Low-impact transportation

Theme 5: Transport, Infrastructure and Open Spaces

Background

The top three issues raised during the engagement stage of this strategy were traffic congestion, road conditions and parking.

Significant work is underway across the region and Shire to address transport and infrastructure issues. With increasing visitor numbers, more cars on the roads, congestion, and limited parking this will continue to be a focus of Council for the foreseeable future.

With increasing visitor numbers, Council needs to assess parking as well as the feasibility of introducing paid parking in other areas to raise funds for the improvement and renewal of assets.

Improved and additional parking will encourage longer lengths of stay by visitors and improve amenities for residents. However, there are also pressures to reduce parking and provide better alternatives such as public transport, cycling, walking pathways and renewed open spaces.

In 2019, Council initiated the Multi**-**Use of the Rail Corridor (MURC) Feasibility Study of the Yelgun to Bangalow rail corridor to consider the feasibility of its use for both rail and trail. The study provides options for public transport via a rail-based service for visitors and local residents alike. It looks at how a walking and cycling path could integrate with public transport to ensure the use of the corridor is maximised.

Over 1,000 members of the community shared their views and support for the reactivation with a combined solution.

Case study

Case study 5a: Rails-with-Trails in the US – The Santa Fe Rail Trail – New Mexico USA

There has been a significant increase in the development of multi-use trails alongside active freight, passenger and tourist rail lines. These rails-with-trails are safe and increasingly common right around the world.

The most impressive of the new trails is the Santa Fe Rail with Trail, an 18-mile path that starts as a broad, paved track and dwindles to packed dirt. The trail follows rail tracks and running trains for the whole way. The track terrain is similar to the Byron Shire, where a

potential multi-use rail corridor would run from rolling hills to the sea while following an operating train service.

Similar to the Santa Fe Rail, a rail-with-trail in Byron Shire could offer several safe and low-impact transport options, encouraging more cars off the road, additional accessibility for both residents and visitors, and connecting destinations throughout the region. This, in turn, would encourage visitors to a variety of locations throughout Byron Shire.

Strategies

1. Improve road infrastructure, parking availability, open spaces and improve accessibility and safety.

2. Reduce visitor dependency on cars when visiting Byron Shire.

Actions

1. Deliver transport related projects including, but not limited to:
    a. Integrated Transport Strategy
    b. Multi-Use Rail Corridor project
    c. Bike Strategy
    d. Pedestrian and Mobility Plan (PAMP)
    e. Road Safety Campaign and initiatives
    f. Ongoing parking management reviews of key tourism areas
    g. Byron Town Centre Bypass
    h. Review Development Contributions Plan.

2. Develop a Public Open Space Accessibility Program.

3. Communicate and encourage low-impact transportation options to visitors.

4. Develop an inclusive tourism action plan.

GSTC Compliance Criteria

A2 Destination management organisation

A6 Inventory of tourism assets and attractions

A8 Access for All

A13 Crisis and emergency management

B5 Local Access

C2 Visitor Management

C3 Visitor Behaviour

D12 Low-impact transportation

Theme 6: Planning For Visitor Accommodation

Background

Council is the consent authority for local development applications (DAs) and is responsible for decisions related to strategic land-use planning through the development of a Local Environmental Plan (LEP).

In addition, Council is also involved in the planning, provision and management of community activities, services and infrastructure that are shared by residents and visitors.

These include parks and reserves, road infrastructure, water management, sewage treatment facilities, pedestrian and streetscape improvements. It also includes public amenities such as toilets, cycleways and parking facilities and visitor accommodation and developments.

Visitor Accommodation

When planning for towns and villages, Council takes into consideration the impacts and future growth of tourism in each precinct as well as the diverse needs of our community.

Our community has told us it does not want to see high-rise hotel chains (higher than three storeys) or additional short-term rental accommodation.

Our community wants to see a cross-section of visitors throughout the Shire; backpackers, families and business and conferencing delegates. Yet there is currently a lack of business and conference accommodation and venues. Byron Shire is also impacted by unauthorised camping activity.

Council needs to investigate the feasibility of planning mechanisms that allow a variety of accommodation types to suit the different market segments the community wishes to retain and attract. It needs to ensure enough accommodation in various areas that will encourage dispersal, decrease the likelihood of illegal camping, and facilitate minimal visitor impact on our communities and natural environment.

Short Term Rental Accommodation

Short-term rental accommodation (STRA) is the use of residential properties for the purpose of temporary holiday accommodation for visitors. Until a few years ago, these were mainly properties managed by real estate agencies.

In more recent years, the advent of online booking platforms has made it much easier for property owners to use their house or apartment for STRA. Increased accessibility coupled with strong demand for tourist and visitor accommodation has led to a significant increase in the number of dwellings being used for STRA in the Byron Shire.

STRA is more commonly used by visitors in Byron Shire than elsewhere in NSW. In the three years to 2016-17, nearly one fifth (18 percent) of domestic overnight visitors used rental properties booked through an online platform. Byron Shire has more STRA listings than all but three Greater Sydney Local Government Areas.

Despite the popularity and wide-spread adoption of online-booked STRA in NSW, it is not effectively regulated through the planning system and may be unlawful in many cases.

Better regulation is urgently needed to manage the impacts of STRA and improve safety for guests and hosts.

Council is currently working on a planning proposal that seeks to introduce new planning rules for short-term rental accommodation through an amendment to Byron Local Environmental Plan 2014. Options currently under consideration include limiting non-hosted accommodation (where the host does not reside in the dwelling during the accommodation period) to a maximum of 90 days per year, as well as introducing appropriate standards for parking, occupancy, fire safety and neighbourhood amenity.

Council hopes to achieve an appropriate balance of regulation that allows for new tourism opportunities while still preserving our supply of residential housing and managing adverse impacts on neighbourhood amenity.

Case Studies

Case study 5a: How STRA will work under the new framework

Under the proposed regulatory framework, STRA will be divided into two different accommodation types: (1) hosted STRA and (2) non-hosted STRA.

Hosted STRA is similar to a bed and breakfast and requires a host to be residing in the premises during the period of accommodation. Under a hosted STRA, guests have the opportunity to live with a local, offering a unique visitor experience.

Non-hosted STRA, on the other hand, is a typical holiday house experience, where there is no permanent resident or host present during the period of accommodation.

It is anticipated that hosted STRA will be permitted 365 days per year, while non-hosted STRA will be limited to a certain number of days per calendar year, in recognition of the greater impact unsupervised accommodation can have on neighbourhood amenity and dwelling supply.

Strategies:

1. Improve the regulation of short term rental accommodation

2. Improve planning regulations and zoning for managing the growth of tourism.

3. Improve development controls to manage local amenity.

Actions:

1. Prepare a planning proposal to define and regulate short-term rental accommodation. The planning proposal should include limitations on the maximum number of days a dwelling can be used for non-hosted short term rental accommodation in a calendar year.

2. Review planning controls relating to rural tourist development and make amendments to the Byron LEP 2014 and/or Byron DCP 2014 where necessary to clarify and confirm an appropriate development type and use.

3. Investigate the introduction of planning controls to support a diversity of accommodation type to suit various visitor types, with enough accommodation in different localities to encourage visitor dispersal and to minimise impacts on our communities and our natural environment.

4. Regularly monitor tourism trends and evaluate planning controls to ensure the visitor economy and community are considered

Section 8: Action Plan

This action plan is a summary of the strategies and actions outlined in the themes above. Each strategy and action has been prioritised, and assigned a timeframe, a lead agency (for primary responsibility of implementation), project partners and key performance indicators. This will ensure all actions and strategies can be delivered and their success measured.

CSP here refers to Community Strategic Plan. Full titles of other organisations referred to by acronym are available in the Glossary at the end of this document.

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
Leadership and Destination Management						
	Position Byron Shire as a leading sustainable and environmentally responsible tourism destination	Develop, in partnership with industry and government, a multi-year action plan and budget to implement the SVS.	**Priority** High **Timeframe**	Local Tourism Organisation (LTO) Visitor Centres (VC) Chambers of Commerce (CoC) Industry and business Destination NSW (DNSW) Tourism Australia (TA) National Parks and Wildlife Service (NPWS) Arakwal Corporation (AK)	We manage growth and change responsibly	Under development
		Continue to strengthen strategic partnerships to drive sustainable tourism leadership in the local area and Northern Rivers region as a whole.	**Priority** Medium **Timeframe** 2023 – 2026	Local business and industry Destination North Coast (DNC) DNSW CoC NSW Government TA AC NPWS	We manage growth and change responsibly	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
		Work with government agencies to better inform visitors and industry on communication of crisis and emergency response plans	**Priority** Medium **Timeframe** 2023 – 2026	NSW Government Federal Government Local business and industry DNSW DNC	We manage growth and change responsibly	Under development
		Improve career and education pathways for youth and local residents by working with education/ training providers and industry	**Priority** High **Timeframe** 2020 – 2022	Employment agencies Local business and industry Education providers, Universities, Tafe's	We manage growth and change responsibly	Under development
		Develop a governance model to assist with implementing the Sustainable Visitation Strategy	**Priority** High **Timeframe** 2020	Local Tourism Organisation (LTO) Visitor Centres (VC) Chambers of Commerce (CoC) Industry and business National Parks and Wildlife Service (NPWS) Arakwal Corporation (AK)	We manage growth and change responsibly	Under development
		Investigate the opportunity to design a Byron Shire Eco Check program to assist tourism businesses implement environmentally friendly and sustainable business practices.	**Priority** High **Timeframe** 2020 – 2022	Industry and business National Parks and Wildlife Service (NPWS) Arakwal Corporation (AK) Local Tourism Organisation (LTO) Chambers of Commerce (CoC)	We manage growth and change responsibly	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
		Encourage and work with local environmental groups to develop volunteer tourism initiatives	**Priority** Medium to Long **Timeframe** 2023 – 2030	Local businesses and industry	We protect and enhance our natural environment	Under development
	Investigate alternate methods to secure additional revenue streams from government and visitors to support the implementation of the SVS.	Implement and review approved funding options annually	**Priority** High **Timeframe** Annual	NSW Government Local business and industry	We manage growth and change responsibly	Under development
Repositioning Byron Shire						
	Create a strategic communications and repositioning strategy to attract visitors with shared community values	Proactively engage with key stakeholders and agencies such as Tourism Australia, Destination NSW, Destination NSW and industry and industry to change to values-based messaging for Byron Shire.	**Priority** High **Timeframe** 2020 – 2030 (ongoing)	DNC DNSW TA LTO CoC	We manage growth and change responsibly We cultivate and celebrate our diverse cultures, lifestyle and sense of community.	Under development
		Collaborate with industry to encourage tourism product and visitor experiences that complement the brand, values and image of Byron Shire.	**Priority** Medium **Timeframe** 2023 – 2026	Local business and industry National Parks and Wildlife Services (NPWS) DNC DNSW	We manage growth and change responsibly	Under development
		Continue to lead, educate, undertake and share tourism research, including trends, opportunities, visitor satisfaction and information.	**Priority** High **Timeframe**	Tourism Research Australia (TRA) DNSW Local business and	We manage growth and change responsibly	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
			2020 – 2030 (ongoing)	industry CoC LTO VC		
		Create a 'Welcome to Byron Shire' program for visitors, and a Tourism Toolkit for industry, both aiming to lift customer service standards, provide product, destination and indigenous heritage information, and specific behaviour expectations	**Priority** Medium **Timeframe** 2023 – 2026	Local business and industry CoC LTO VC	We cultivate and celebrate our diverse cultures, lifestyles and sense of community We protect and enhance our natural environment	Under development
		Develop, through collaboration, a whole of destination tourism wayfinding and signage strategy.	**Priority** Medium **Timeframe** 2023 – 2026	Local business and industry National Parks and Wildlife Services (NPWS) DNC DNSW CoC VC LTO	We protect and enhance our natural environment We manage growth and change responsibly	Under development
		Work with Byron Bay and Brunswick heads Visitor Information Centres to improve the delivery of visitor information in line with future trends.	**Priority** Medium **Timeframe** 2023 – 2026	VC	We manage growth and change responsibly	Under development
		Review and update the Byron Shire Visitor Services Strategy	**Priority** Medium **Timeframe**	VC	We manage growth and change responsibly	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
			2023 – 2026			
		Lobby Destination NSW and Tourism Research Australia for regular inclusion of Byron Bay in the International day Visitor Survey	**Priority** Medium **Timeframe** 2023 – 2026	Destination NSW TRA	We manage growth and change responsibly	Under development
		Undertake an accommodation and tourism product inventory audit every 5 years	**Priority** Medium **Timeframe** Every 5 years 2024 and 2029	Industry Destination North Coast Destination NSW	We manage growth and change responsibly	Under development
		Undertake a review of the visitor economy forecast 2020 – 2030 annually	**Priority** High **Timeframe** 2020 – 2030 (ongoing)	Tourism Research Australia (TRA)	We manage growth and change responsibly	Under development
Culture						
	Protect and enhance the indigenous, heritage, artistic and cultural diversity of Byron Shire	Support Council's Social and Cultural Planning in the development of an Arts and Cultural Policy that defines the role of Council in relation to protecting and enhancing the cultural vitality of the shire.	**Priority** High **Timeframe** 2020 – 2022	Community Industry Community Strategic Plan	We cultivate and celebrate our diverse cultures, lifestyles and sense of community	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
		Promote cultural expression through events	Still to be developed	Still to be developed	We cultivate and celebrate our diverse cultures, lifestyles and sense of community	Under development
	Preserve the living culture and traditions of Byron Shire	Consult local Aboriginal stakeholders in relation to opportunities to enhance visitation experiences while maintaining and protecting cultural heritage sites and places	**Priority** High **Timeframe** 2020 – 2022	Arakwal Corporation NPWS Still to be developed	We cultivate and celebrate our diverse cultures, lifestyles and sense of community	Under development
Events						
	Improve the sustainability, coordination and management of festivals, business and leisure events, weddings and filming in Byron Shire.	Improve coordination and management of events by developing a shire-wide event strategy	Under development	Under development	We cultivate and celebrate our diverse cultures, lifestyles and sense of community We manage growth and change responsibly	Under development
		Work with industry in the region to raise the quality of events, and support them to educate their attendees/participants in expected behaviour and community values in Byron Shire	**Priority** High **Timeframe** 2020 – 2030 (ongoing)	Festival and event organisers	We cultivate and celebrate our diverse cultures, lifestyles and sense of community We manage growth and change responsibly	Under development
		Work with key stakeholders and agencies on regional and national event policy and frameworks	**Priority** Medium **Timeframe** 2023 – 2026	Festival and event organisers Industry DNSW	We manage growth and change responsibly	Under development
		Undertake research into event sustainability best practice, and consider opportunities for Council to be a leader in this field,	**Priority**	Festival and event	We manage growth and change	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
		driving towards net zero emissions for the industry	Medium **Timeframe** 2023 – 2026	organisers Industry DNSW TRA	responsibly We protect and enhance our natural environment	
		Continue to work with agencies and industry to continue to develop Byron Shire as a leading business events and conferencing destination.	**Priority** High **Timeframe** 2020 – 2030 (ongoing)	Local business and industry DNC North Coast Business Events (NCBE) DNSW	We manage growth and change responsibly	Under development
Transport, Infrastructure and Open Spaces						
	Improve road infrastructure, parking availability, open spaces and improve accessibility and safety	Deliver transport related projects including the:- a. Integrated Transport Strategy b. Multi-Use Rail Corridor project c. Bike Strategy d. Pedestrian and Mobility Plan (PAMP) e. Road Safety Campaign and initiatives f. Ongoing parking management reviews of key tourism areas g. Byron Town Centre Bypass h. Review Development Contributions Plan	**Priority** High to Medium **Timeframe** 2020 – 2026	Integrated Transport Strategy Multi-use Rail Corridor Bike Strategy Pedestrian and Mobility Plan	We have infrastructure, transport and services which meet our expectations We manage growth and change responsibly	Under development
		Develop a Public Open Space Accessibility Program	Under development	Community Strategic Plan	We have infrastructure, transport and services which meet our expectations	Under development
		Develop an inclusive tourism action plan	**Priority** Medium **Timeframe** 2023 – 2026	Under development	We have infrastructure, transport and services which meet our expectations	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
	Reduce visitor dependency on cars when visiting Byron Shire	Communicate and encourage low-impact transportation options to visitors.	**Priority** High to Medium **Timeframe** 2020 – 2026	Byron Bay Town Centre Masterplan	We have infrastructure, transport and services which meet our expectations	Under development
Planning for visitor accommodation						
	Improve the regulation of short term rental accommodation	Prepare a planning proposal to define and regulate short term rental accommodation. The planning proposal should include limitations on the maximum number of says a dwelling can be used for non-hosted short term rental accommodation in a calendar year.	Under development	Under development	Under development	Under development
	Improve planning regulations and zoning for managing the growth of tourism	Review planning controls relating to to rural tourism developments and make amendments to the Byron LEP 2014 and/or Byron DCP 2014 where necessary to clarify and confirm an appropriate development type and use.	**Priority** Medium **Timeframe** 2023 – 2026	Under development	We manage growth and change responsibly	Under development
	Improve development controls to manage local amenity	Investigate the introduction of planning controls to support a diversity of accommodation types to suit various visitor types, with enough accommodation in different localities to encourage visitor dispersal and to minimise impacts on our communities and our natural environment.	**Priority** High – medium **Timeframe** 2020 – 2026	Under development	We manage growth and change responsibly We cultivate and celebrate our diverse cultures, lifestyle and sense of community We protect and enhance our natural environment	Under development
		Regularly monitor tourism trends and evaluate planning controls to ensure the visitor economy and community are considered	**Priority** High **Timeframe**	Under development	We manage growth and change responsibly We protect and enhance our natural environment	Under development

SVS Theme	Strategy	Actions	Priority and Timeframe	Project Partners, project lead and Complementary Strategies	Community Strategic Plan – Theme	Key Performance Indicators
			Ongoing			

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Appendices

Appendix 1: Acronyms and definitions

ABS Australian Bureau of Statistics
CoC Chamber of Commerce
CSP Community Solutions Panel
DA – Development Application
DCP Development Control Plan
DNSW Destination NSW
GSTC Global Sustainable Tourism Council
LEP Local Environment Plan
LGA Local Government Area
LTO Local Tourism Organisation
NPWS National Parks and Wildlife Service
STRA Short Term Rental Accommodation
SVS Sustainable Visitation Strategy
TA Tourism Australia
TMP Tourism Management Plan
TRA Tourism Research Australia
VIC Visitor Information Centre

Appendix 2: Tables and graphs

Table 1: Global Sustainable Tourism Council (GSTC) criteria

A. Overall Sustainable Destination Management	**B. Maximise Local Economic Benefits**	**C. Maintain and Develop a Sense of Culture**	**D. Maximise Benefits to the Environment**
A1. Develop Sustainable Destination/Visitation Strategy	B1. Economic Monitoring	C1. Attraction Protection	D1. Identify Environmental risks
A2. Destination Management Organisation	B2. Local Carer Opportunities	C2. Visitor Management	D2. Protection of Sensitive Environments
A3. Monitoring	B3. Public Participation	C3. Visitor Behaviour	D3. Wildlife Protection
A4. Tourism Seasonality Management	B4. Local Community Opinion	C4. Cultural Heritage Protection	D4. Greenhouse Gas Emissions
A5. Climate Change Adaptation	B5. Local Access	C5. Site Interpretation	D5. Energy Conservation
A6. Inventory of Tourism Assets & Attractions	B6. Tourism Awareness & Education	C6. Intellectual Property	D6. Water Management
A7. Planning regulations	B7. Preventing Exploitation		D7. Water Security
A8. Access for all	B8.Support for Community		D8. Water Quality
A9. Property Acquisitions	B8. Supporting Local Entrepreneurs & Fair Trade		D9. Wastewater
A10. Visitor Satisfaction			D10. Solid Waste Reduction
A11. Sustainability Standards			D11. Light and Noise Pollution
A12. Safety & Security			D12. Low-impact Transportation
A13. Crisis & Emergency Management			
A14. Accuracy in Promotion			

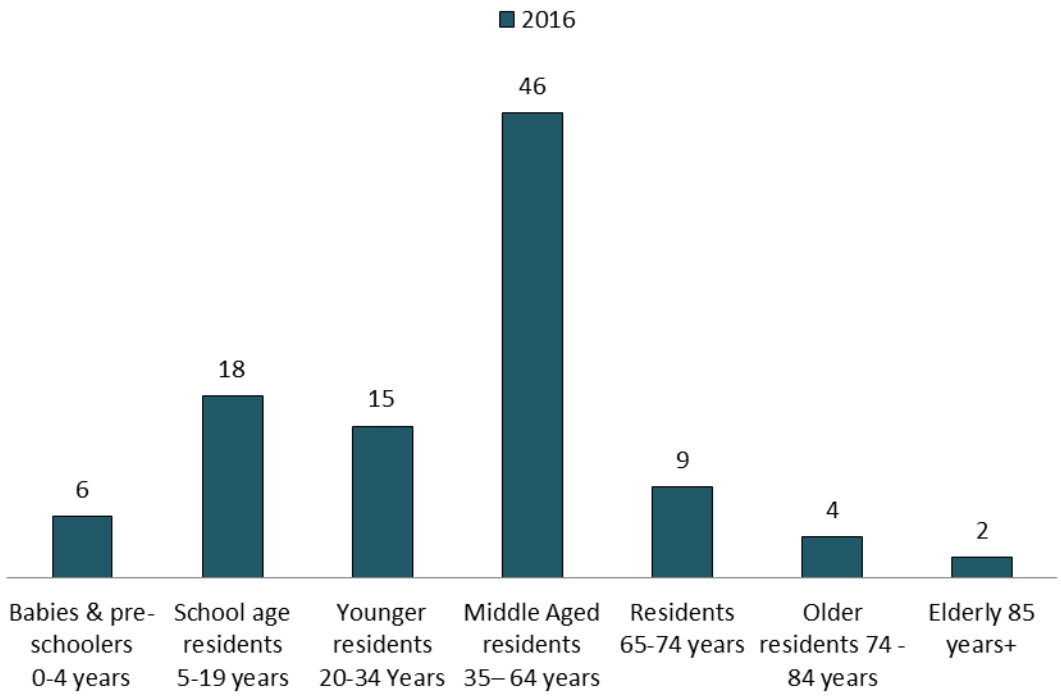


Figure 1: Life-stage profiles Byron Shire residents 2016 (percentage)

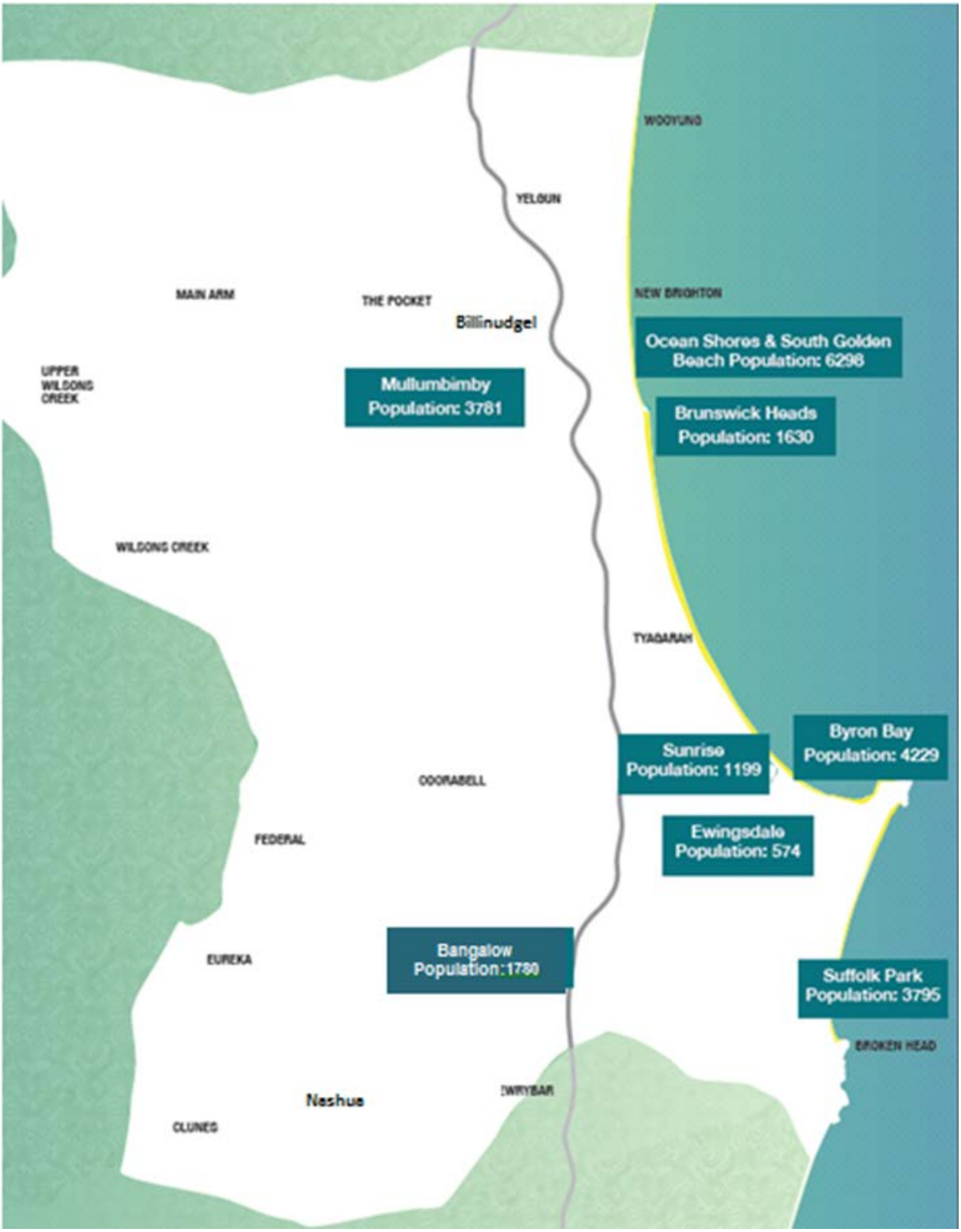


Figure 2: Population per area as of 2016

Table 3: Summary of changes to visitor economy 2008-2019

Factor	**Year ending June 2008** **(unless otherwise stated)**	**Year ending June 2019** **(unless otherwise stated)**	**Growth**
Total number of visitors	1,290,000	2,210,000	71%
Visitor expenditure	$354,000,000	*$776,000,000 *2018 data. 2019 data not available at time of publication.	119%
Population of Byron Shire	28,766	34,574	20%
Domestic Day Trip Visitors *	587,000	991,000	69%
Domestic Overnight Visitors	520,000	994,000	91%
International Overnight Visitors	190,000	225,000	18%
Total visitor nights (domestic and international combined)	3,117,000	5,500,000	76%

Sources: Tourism Research Australia (TRA); National and International Visitor Survey (unpublished data compiled under licence). Copyright remains with TRA. Australian Bureau of Statistics. National Institute of Economic and Industry Research (Natural Economics)

*International day trip visitor data not available.

* all data, and changes between two points of data, are subject to sample error.

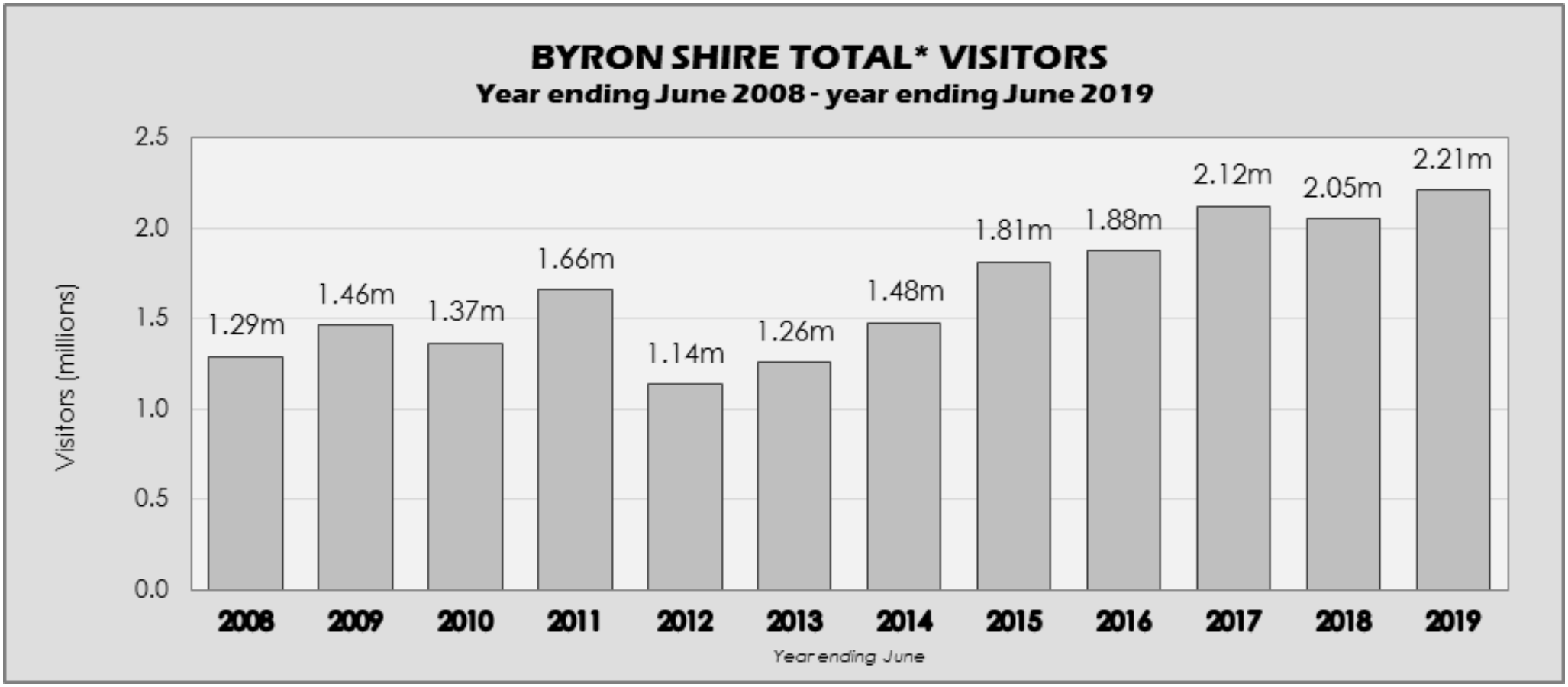


Figure 3: Total visitors

Key summary: In year ending 2019, there were a total of 2.21 million visitors to Byron Shire; our highest annual visitor volume to date.

Table 4: Breakdown by visitor type

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AVERAGE
DOMESTIC OVERNIGHT	40%	29%	31%	30%	40%	37%	40%	42%	42%	39%	41%	45%	38%
DOMESTIC DAY	45%	60%	55%	60%	47%	51%	49%	48%	49%	51%	50%	45%	51%
INTERNATIONAL OVERNIGHT	14%	12%	14%	10%	13%	12%	11%	10%	10%	10%	10%	10%	11%

Key summary: Until year ending June 2018, domestic day visitors were the largest visitor type to Byron Shire. In year ending 2019 domestic overnight and domestic day visitors are each 45% of the visitor type breakdown.

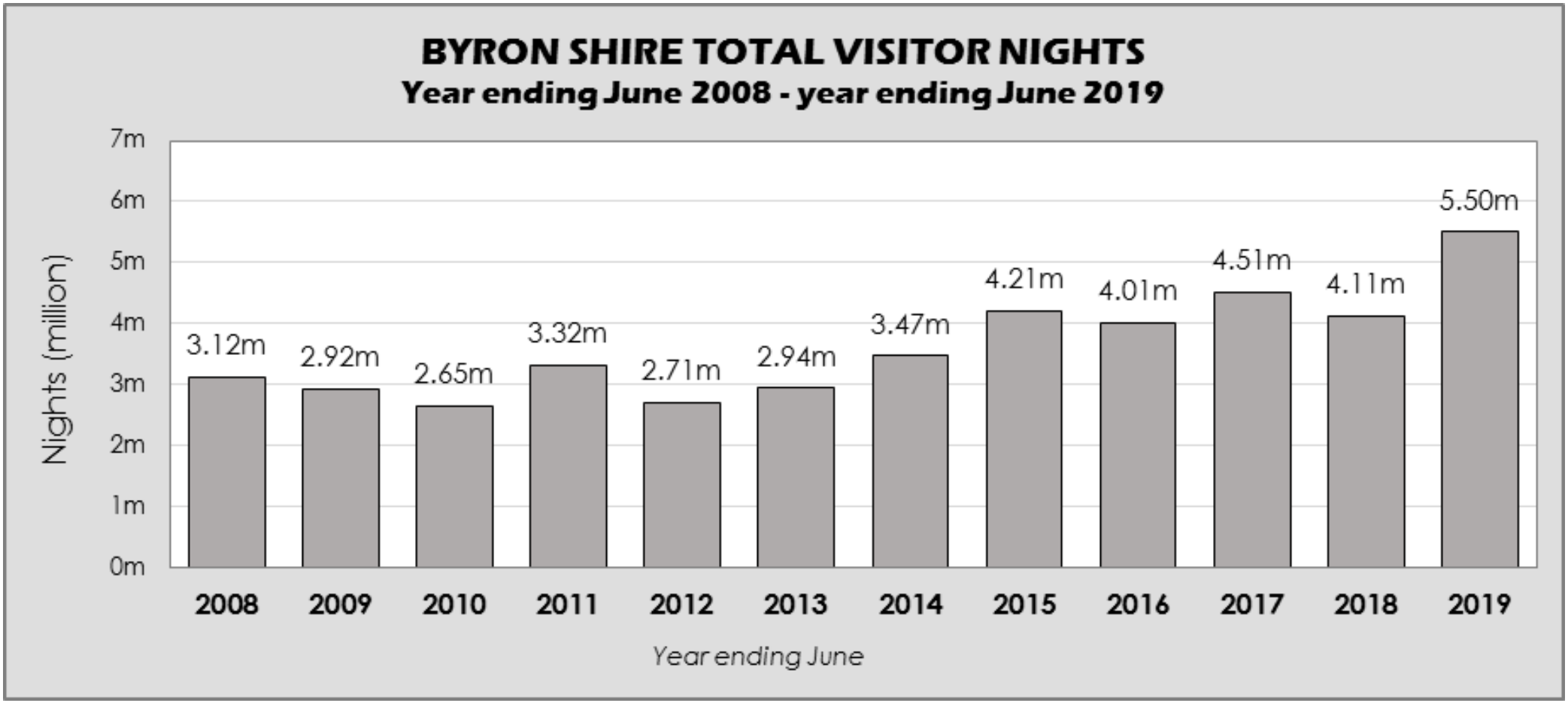


Figure 4: Visitor nights

Key summary: This graph shows the total visitor nights to Byron Shire to year ending June 2019. Total visitor nights have increased to 5.5 million in year ending June 2019; up from 3.12 million in 2008.

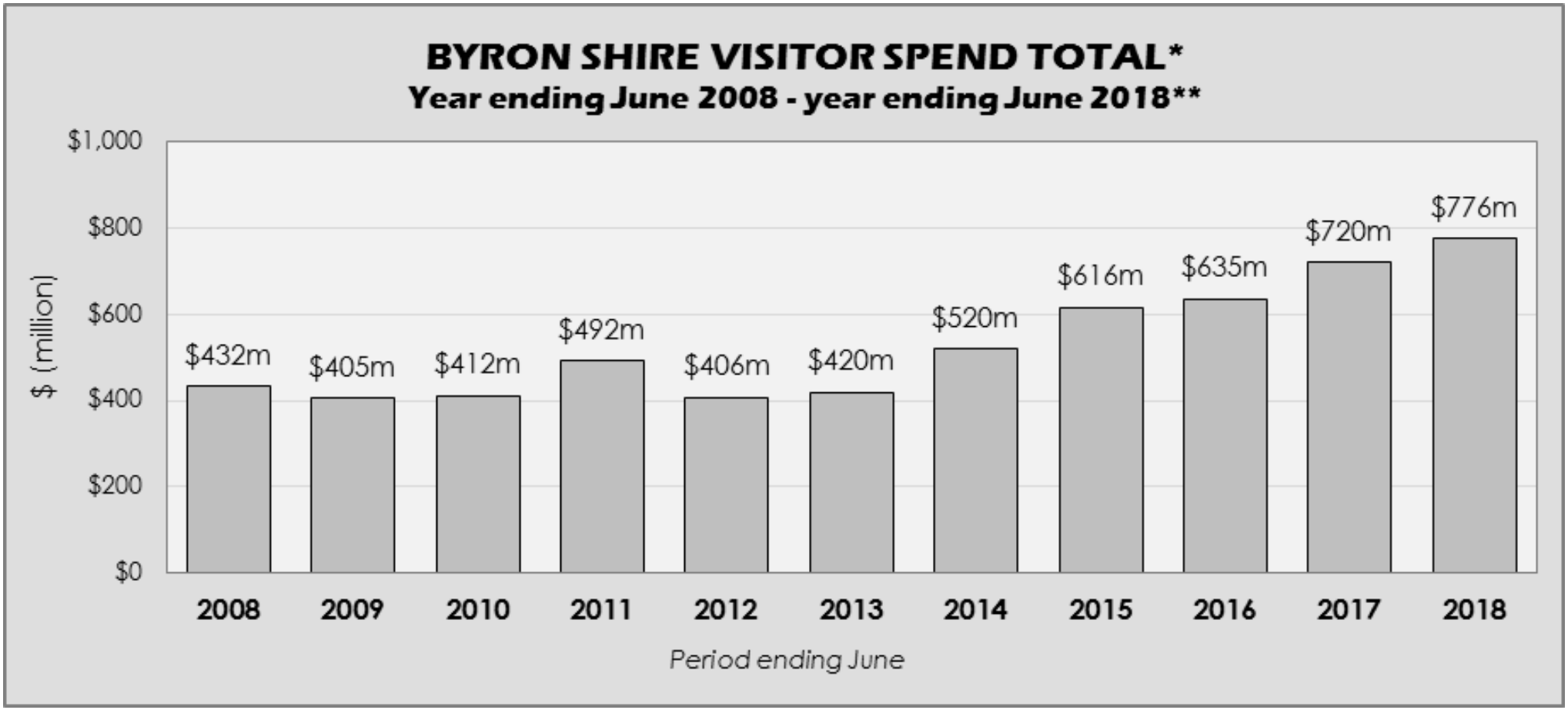


Figure 5: Total visitor expenditure

Key summary: This graphs shows visitor expenditure to year ending June 2018. Year ending 2018 saw a new record for tourism expenditure; with a total spend of $776million. This figure has been steadily climbing since 2012.

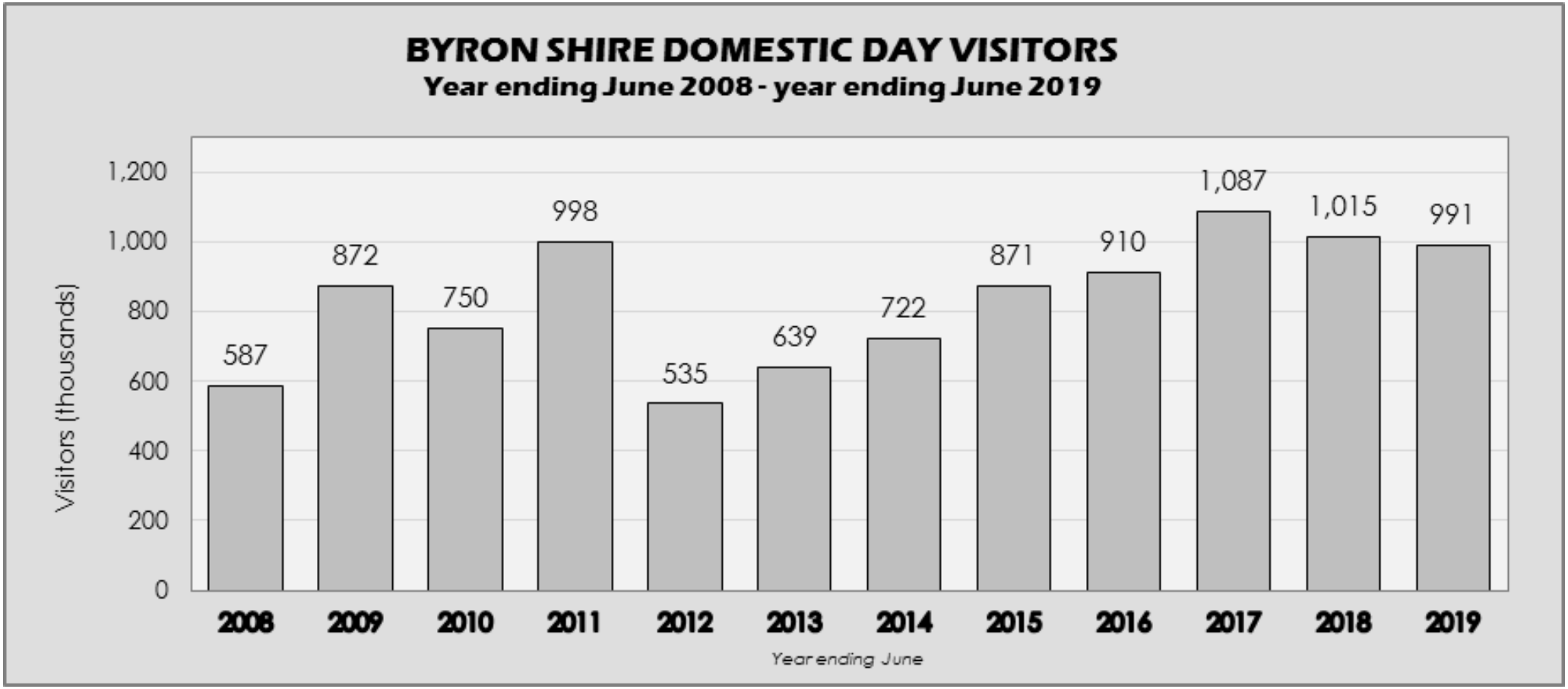


Figure 6: Domestic day visitors

Key summary: This graph shows the number of domestic day visitors to Byron Shire to year ending June 2019. Byron Shire hosted an estimated 991,000 domestic day visitors in the year ending June 2019, with figures showing a gradual decrease in numbers over the previous year.

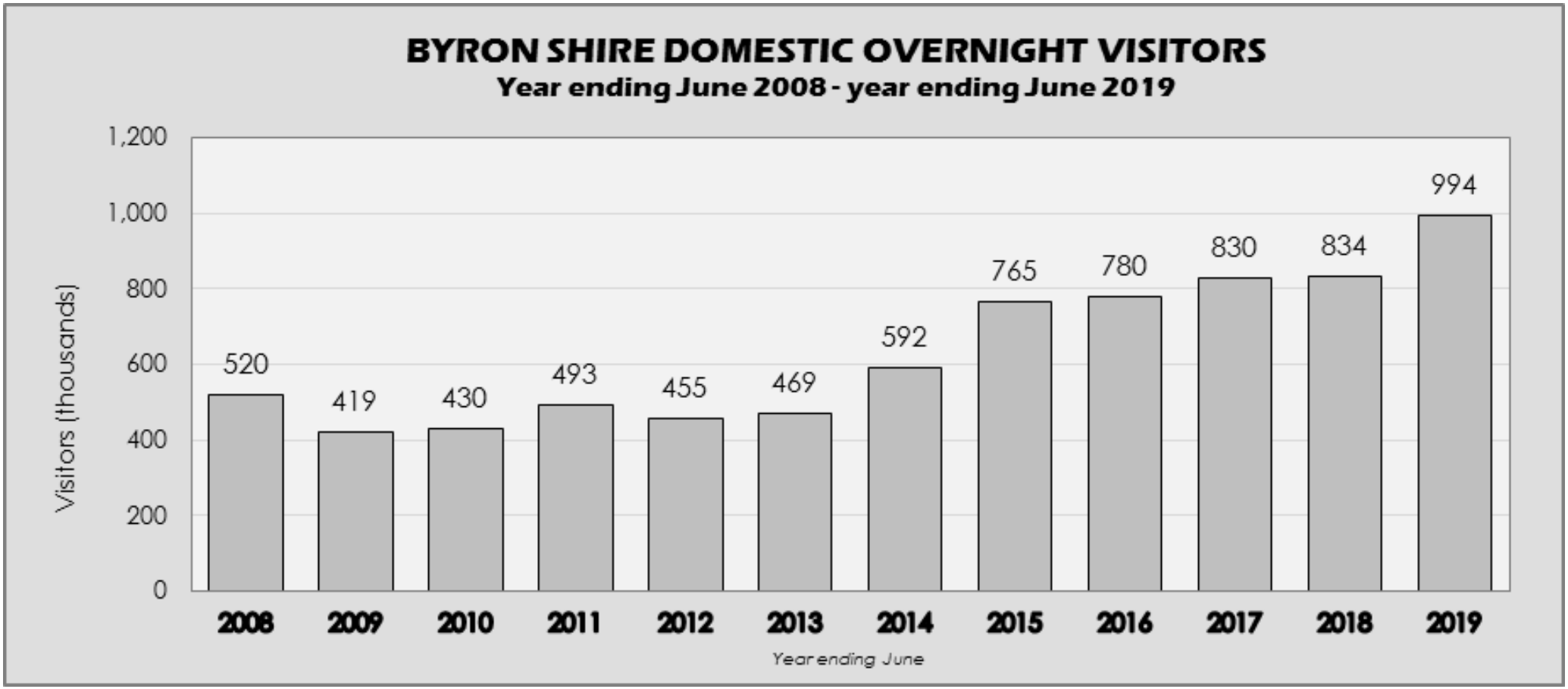


Figure 7: Domestic overnight visitor numbers

Key summary: This graph shows the number of domestic overnight visitors to Byron Shire to year ending June 2019. An estimated 994,000 domestic overnight visitors spent at least one night in the Byron Shire in the year ending June 2019. This figure is an increase of 19.2% in year ending 2019 from the year ending June 2018, the fourth consecutive year of double-digit growth, and is a record for any 12 month period.

Figure 8: Domestic overnight visitors - visitor nights

Key summary: For the year ending June 2019, domestic overnight visitor nights accounted for 3.85 million of the total 5.5 million nights. This is a new record, the fourth consecutive period of double-digit growth, and is 37.6% higher than the same time period in 2018.

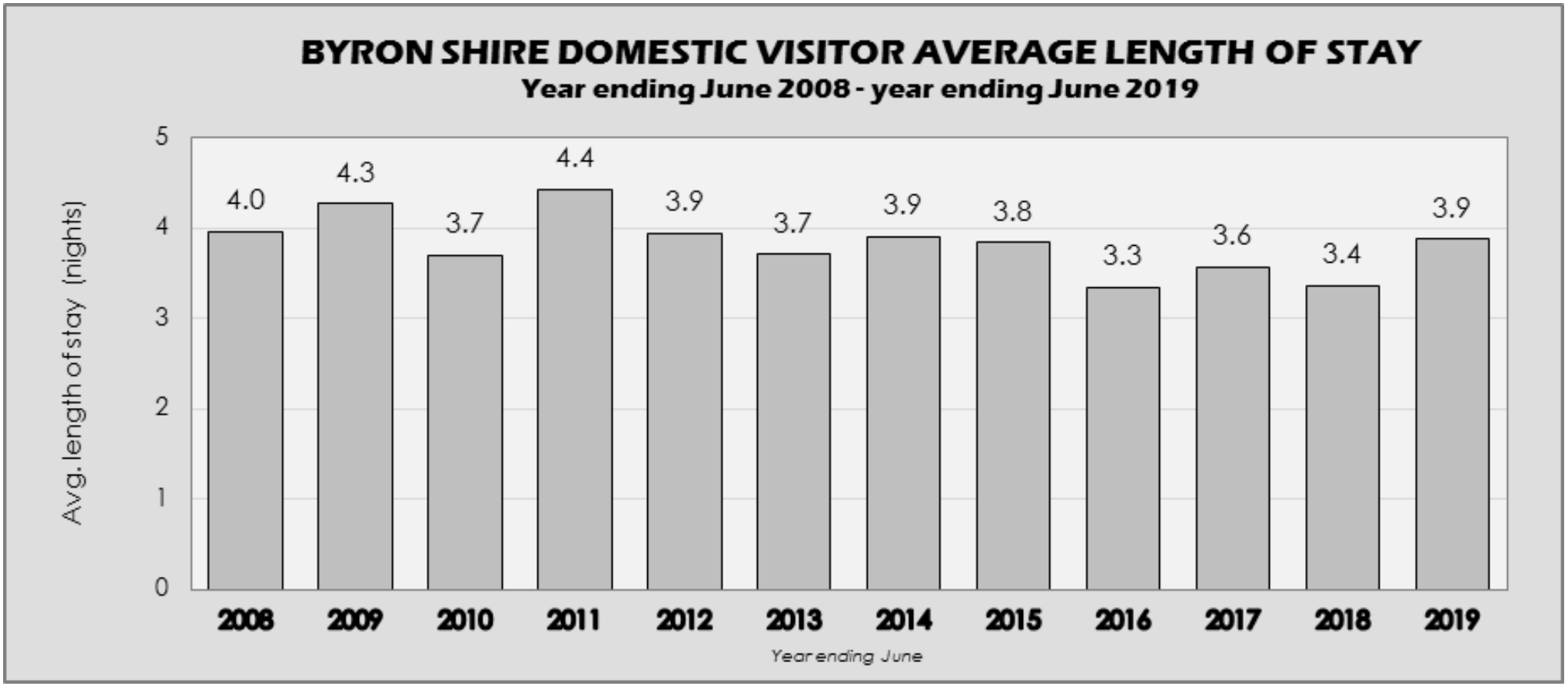


Figure 9: Domestic overnight visitors - average length of stay

Key summary: Domestic overnight visitors stayed an average of 3.9 nights in yean ending June 2019.This is 0.5 nights above that for the same period in 2018 and the highest since the year ending December 2014.

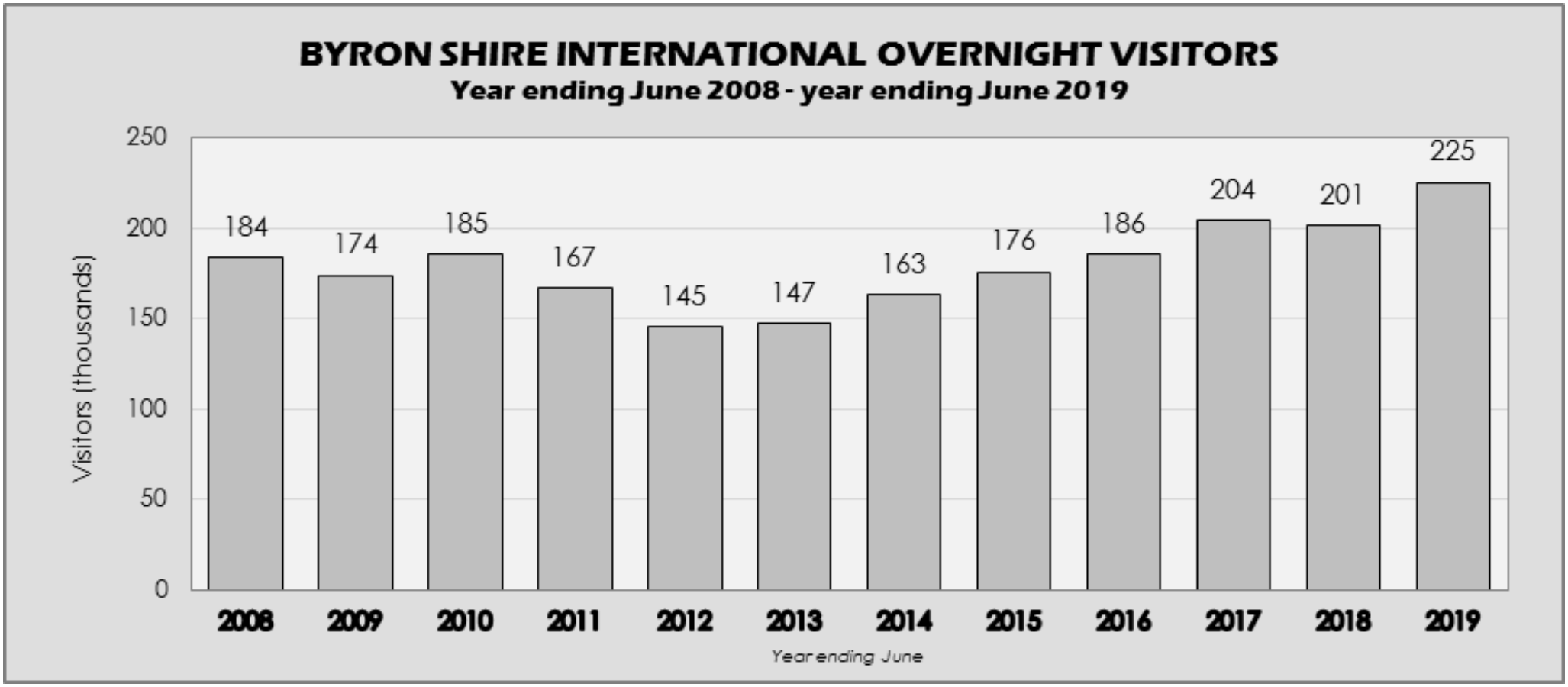


Figure 10: International overnight visitor numbers

Key summary: This graph shows the number of international overnight visitors to Byron Shire to year ending June 2019. In the year to June 2019, there were 225,000 international overnight visitors. This number is an increase of 12% from the same time period in 2018 and a new record.

Figure 11: International overnight visitor nights

Key summary: This graph shows the total number of nights spent in Byron Shire by international overnight visitors to year ending June 2019. In the year ending June 2019, international visitors spent an estimated 1.65 million nights in the Byron Shire; the highest number of international visitor nights for this time period.

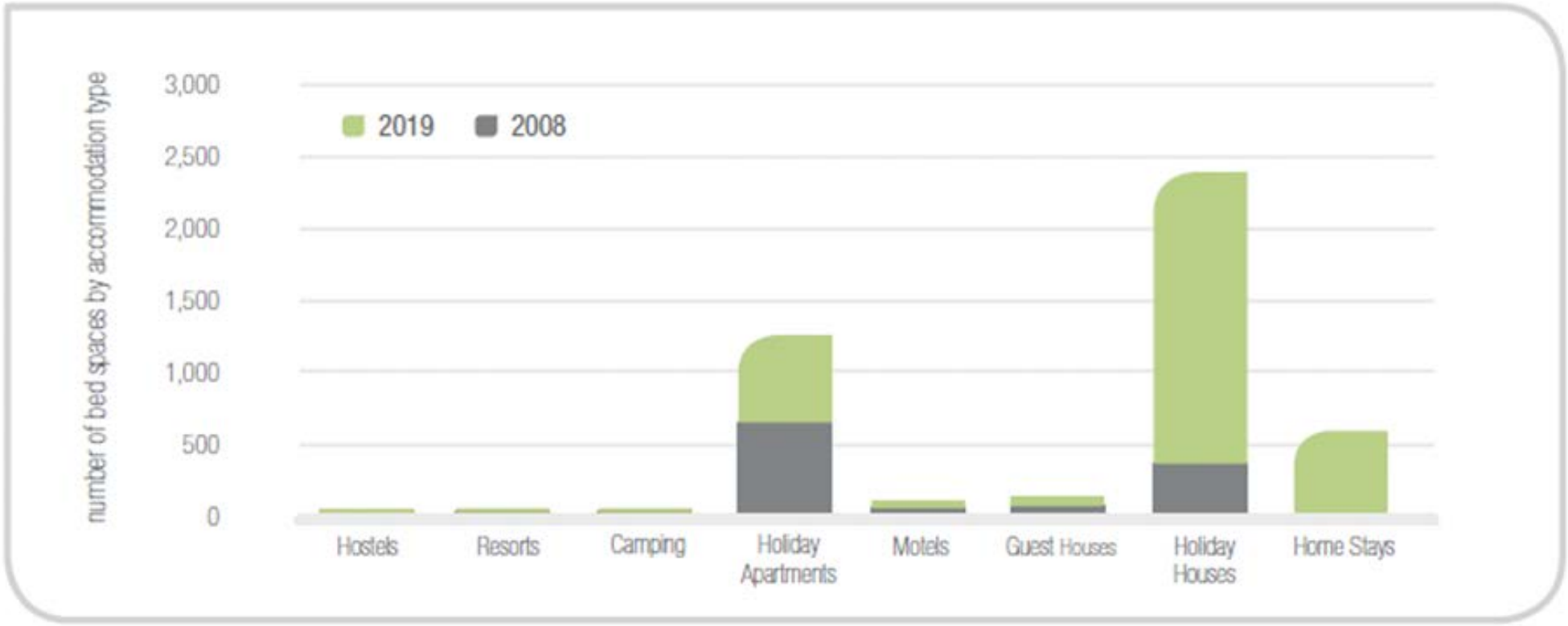
Figure 12: International overnight visitors average length of stay

Key summary: In year ending June 2013, the average length of stay for an international overnight visitor was 8.2 days; the longest average for this time period. The length of stay has remained relatively consistent over the past six years.

Table 5: Accommodation type and number of properties and bed spaces in Byron Shire from 2008 and 2019 and the % change in the number of bed spaces during this period.

Accommodation Type	Number of Properties (2019)	Number of bed spaces (2019)	Total properties % (2019)	Total bed spaces % (2019)	Number of Properties (2008)	Number of Bed Spaces (2008)	% change in the number of bed spaces by town and village from 2008 to 2019
Hostels/Backpackers	10	1751	.5	8	11	1178	32.74%
Caravan Camping	13	5318	.5	24	13	5255	1.19%
Resorts	2	800	.4	4	9	949	-15.70%
Holiday Apartments	671	2846	20	13	615	2885	-1.36%
Hotels/Motels	29	1096	.8	5	25	890	23.15%
Guest Houses	27	228	.8	1	48	335	-31.94%
Holiday Houses	1998	8836	60	40	393	2473	257.30%
Private/Home Stays	575	1150	17	5	7	96	1097%
TOTAL	**3325**	**22,025**	**100%**	**100%**	**1121**	**14061**	**56.63%**

Source: Byron Shire Council Accommodation Audit 2019



Source: Byron Shire Council Accommodation Audit 2019

Figure 13: Number of bed spaces by accommodation type comparing 2008 with 2019 data

Table 6: Total number of properties and bed spaces in Byron Shire by area.

Town	Number of Properties (2019)	Total # of bed spaces (2019)	Total properties % (2019)	Total bed spaces % (2019)	Number of Properties (2008)	Number of Bed Spaces (2008)	% change in the number of bed spaces by town and village from 2008 to 2019
Byron Bay	1717	14216	52	57	787	10032	41.7%
Suffolk Park	350	1645	11	9	92	1507	9.16%
Brunswick Heads	78	1238	3	3	70	1204	2.82%
Bangalow	130	550	4	4	21	135	307%
Mullumbimby	148	532	4	3	14	169	214.80%
Ocean Shores South Golden New Brighton	318	1308	10	9	48	365	258.36%
Hinterland and remaining Shire	556	2536	16	15	89	649	290.76%
TOTAL	**3325**	**22025**	**100%**	**100%**	**1121**	**14061**	**56.63%**

Source: Byron Shire Council Accommodation Audit 2019

Table 7: Tourism products in Byron Shire in 2019

Byron Shire Tourism Products – 2019	**Amount in 2019**	**% of Total in 2019**
Health and Wellness	161	23
Restaurants with evening trade	137	19
Events and Festivals	95	13
Cafes (daytime trade only)	78	11
Performance and Rehearsal Spaces	74	10
Water Sports	21	3
Pubs and Clubs	18	3
Beaches	16	2
Galleries	14	2
Community Markets	12	2
Theatre and Cinemas	5	1
Total	**710**	**100**
Excludes retail, takeaway foods and services from 2008 audit totalling an additional 629 tourism products.	5	1

Figure 14: Total visitor numbers forecast 2020 - 2030

Key summary: Total visitor numbers are expected to reach 3.86 million in 2030.Domestic visitors are forecast to continue to account for more than nine out of every ten visitors. Even if an estimate for international day visitors were added (by doubling international overnight visitors) domestic visitors would still account for the majority of visitor numbers.

Figure 15: Total visitor nights forecast 2020 - 2030

Key summary: Byron Shire can expect around 8.5 million visitor nights in 2030. It is anticipated that overall visitor nights will steadily increase and domestic overnight visitors will continue to outweigh international visitor nights. Over the forecast period, this averages out at 65% domestic; 35% international visitor nights.

Figure 16: Total visitor spend forecast 2020 – 2030

Key summary: Visitor spend is expected to be at $1,623 million in 2030 which is more than double the visitor expenditure of 2018. The visitor spend profile is dominated by domestic visitors (this would also be the case if an estimate for international day visitor spend were added). Domestic overnight visitors account for an average 89% of the $1.1b average visitor expenditure.

Figure 17: Domestic day visitor forecast 2020 to 2030

Key summary: If this growth rate occurs, in 2025, Byron Shire will host almost 1.5 million domestic day visitors. By 2030, the total of 1.78 million would be almost 600,000 more domestic day visitors than forecasted for 2020.

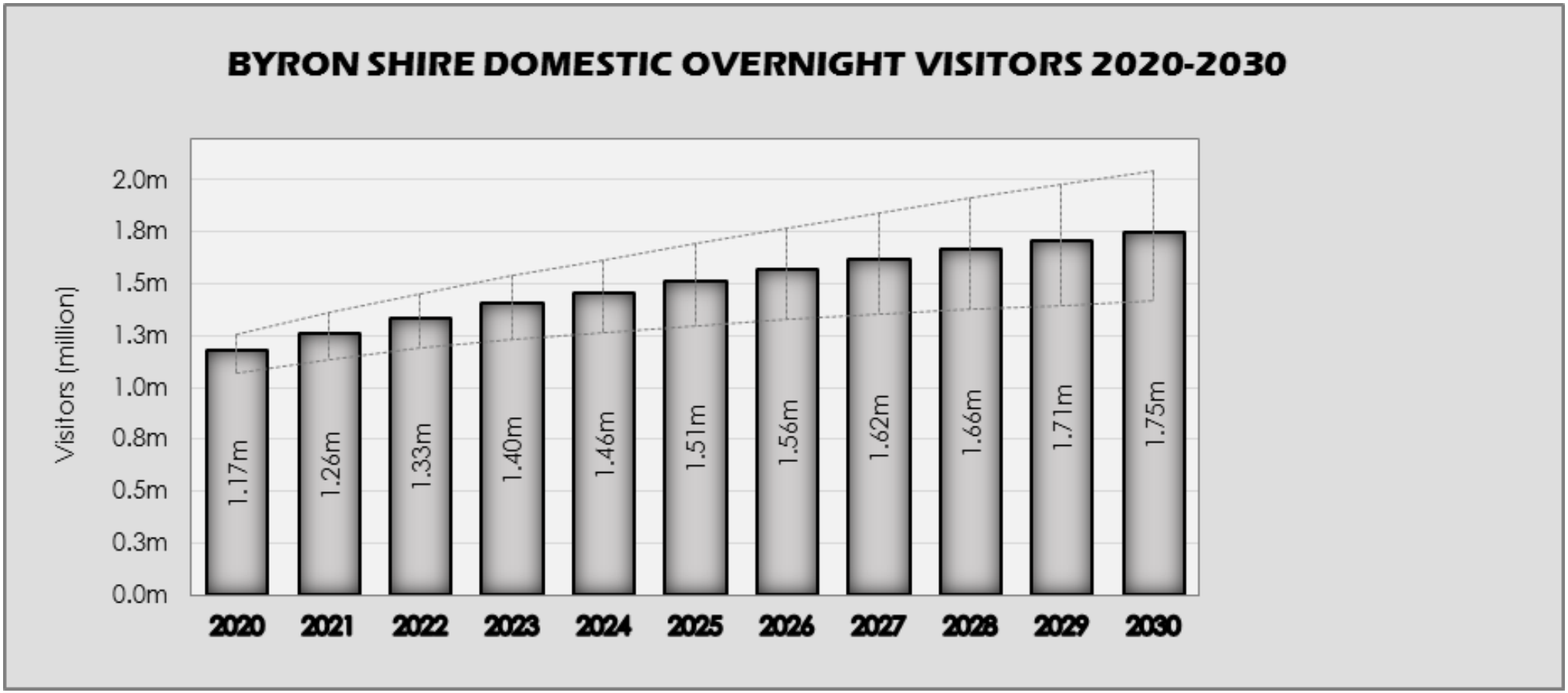


Figure 18: Domestic overnight visitor numbers forecast 2020 - 2030

Key summary: By 2030, a total of 1.75million domestic overnight visitors would be 580,000 more than forecasted for 2020 (1.17 million). This graph represents an average annual growth rate of 4.1% (compounding).

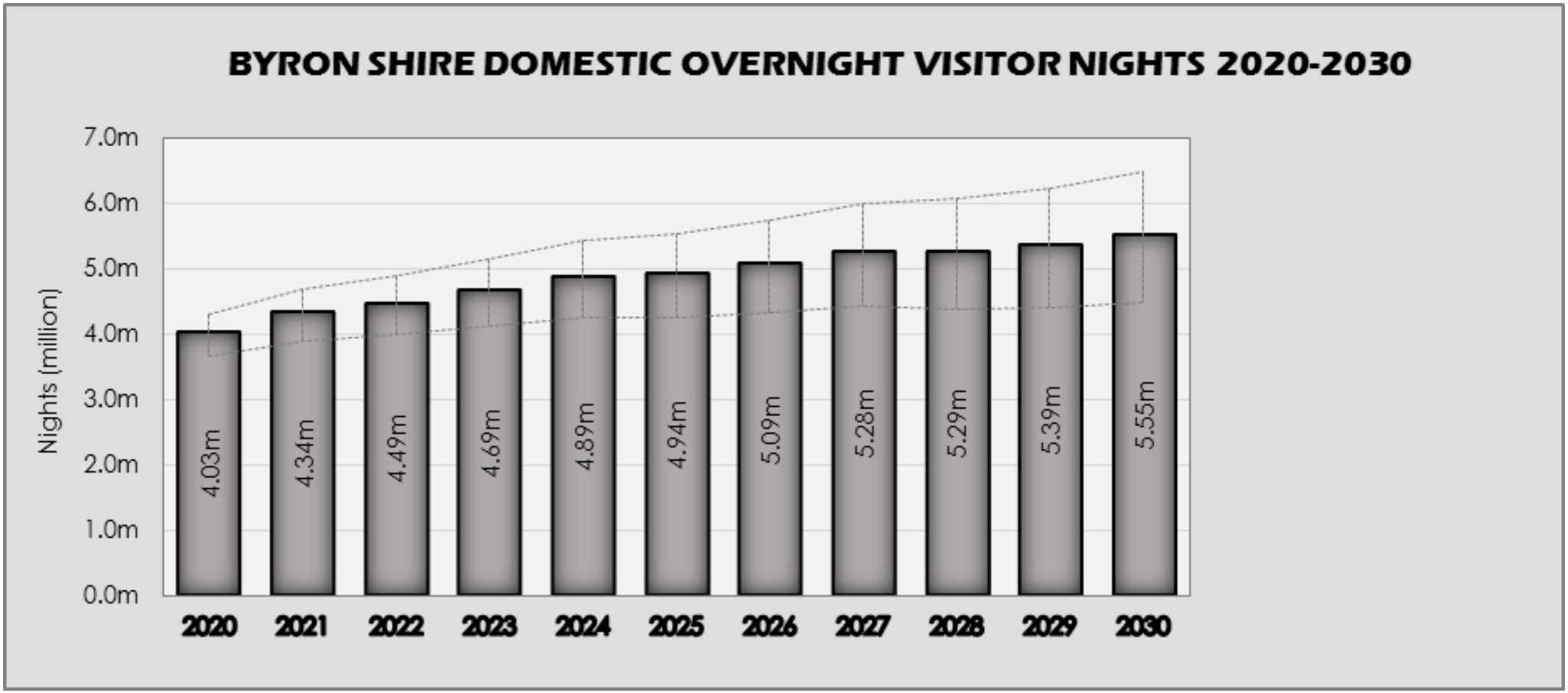


Figure 19: Domestic overnight visitor nights forecast 2020 - 2030

Key summary: Domestic overnight visitor nights are forecasted to increase by more than 1.5 million nights between 2020 and 2030; from 4.03 million nights in 2020 to 5.55 million nights in 2030.

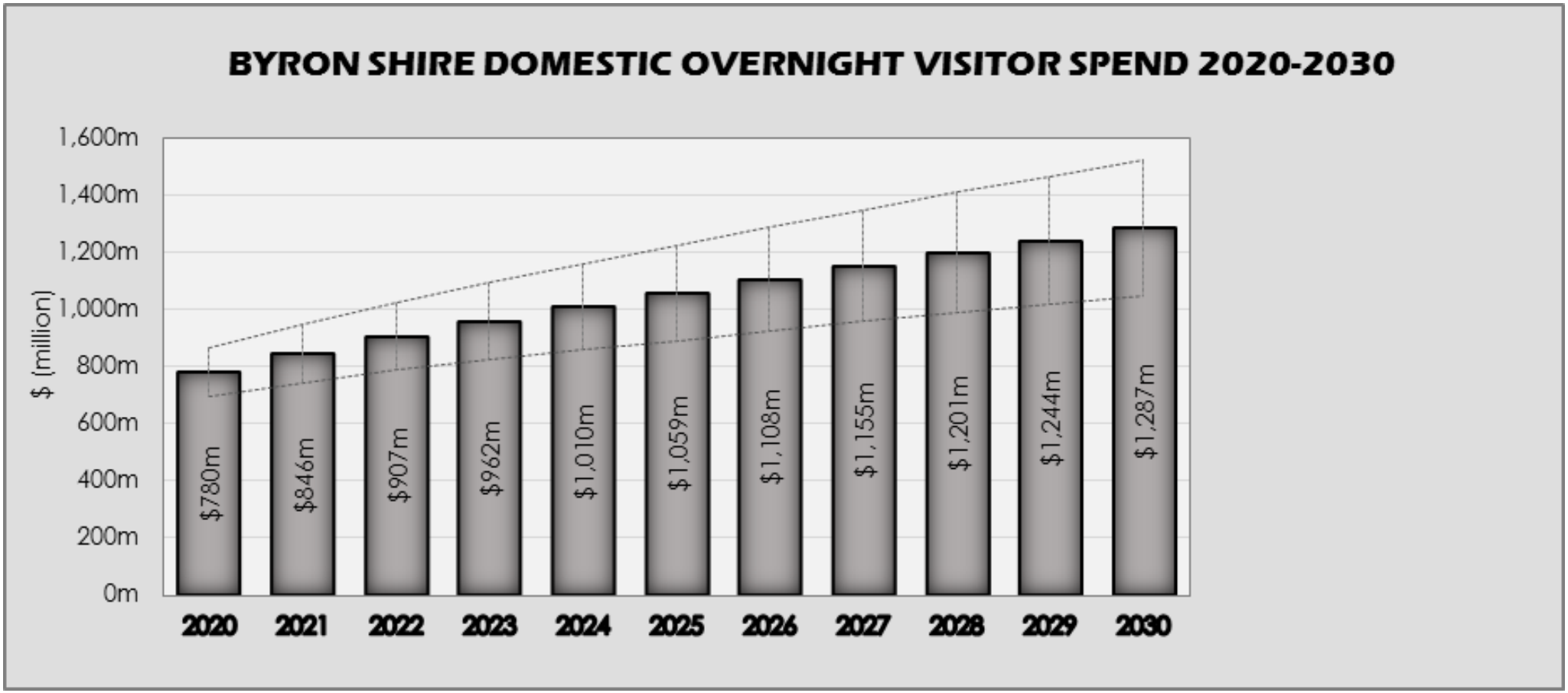


Figure 20: Domestic overnight visitor spend forecast 2020 - 2030

Key summary: The domestic overnight visitor spend forecast translates into an average of $1.05 billion per year (with $1 billion exceeded for the first time in the year 2024).

Figure 21: International overnight visitor numbers forecast 2020 - 2030

Key summary: Over the period 2020-2030 it is anticipated that 240,000 international visitors will spend at least one night in the Byron Shire in 2020, increasing to 340,000 in 2030. Of all visitor categories, international visitors are subject to the largest number of factors that could influence this volume. These include economic factors (such as exchange rates and airfares), and a wide range of other factors including political, perceptual and attitudinal).

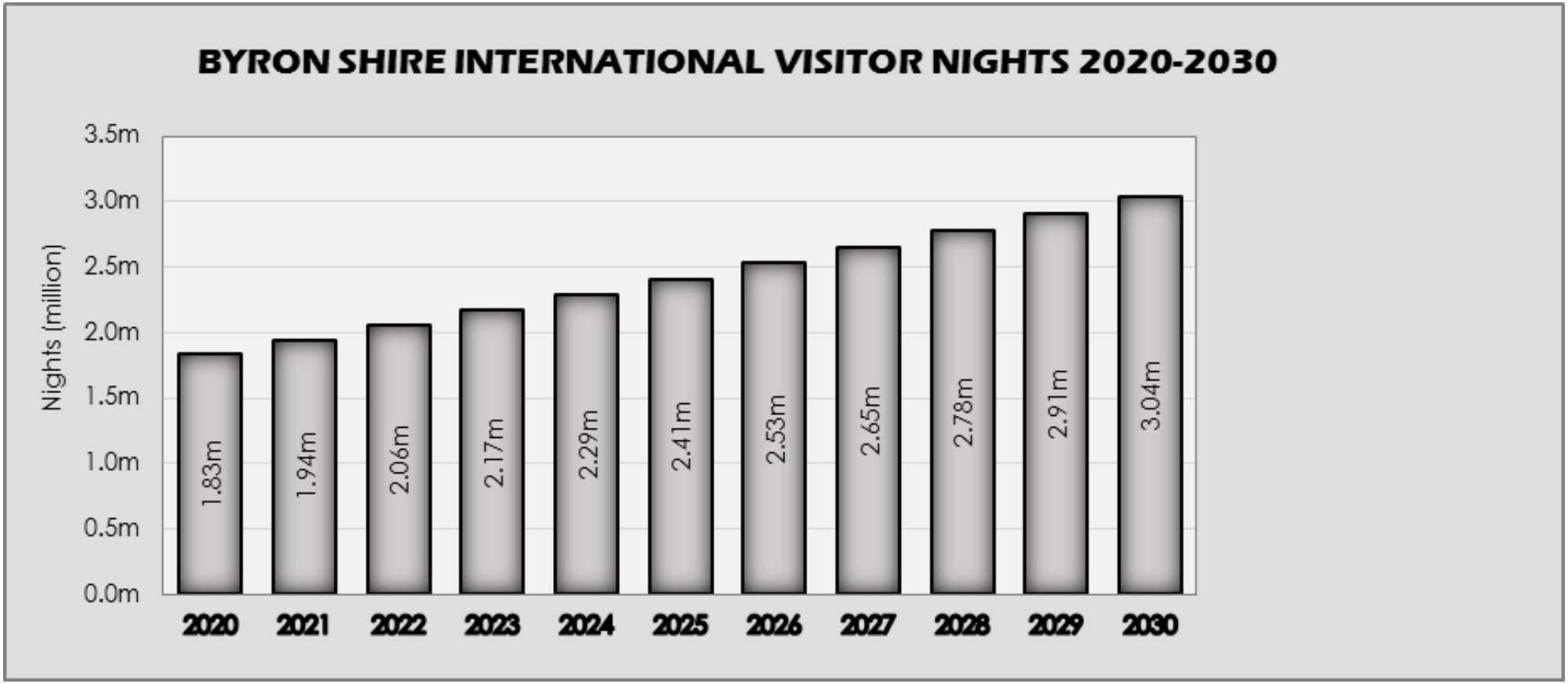


Figure 22: International overnight visitor nights forecast 2020 - 2030

Key summary: Based on the continuation of long term trends in average length of stay, 2 million visitor nights would be exceeded in 2022 and 3 million visitor nights would be exceeded in 2030.

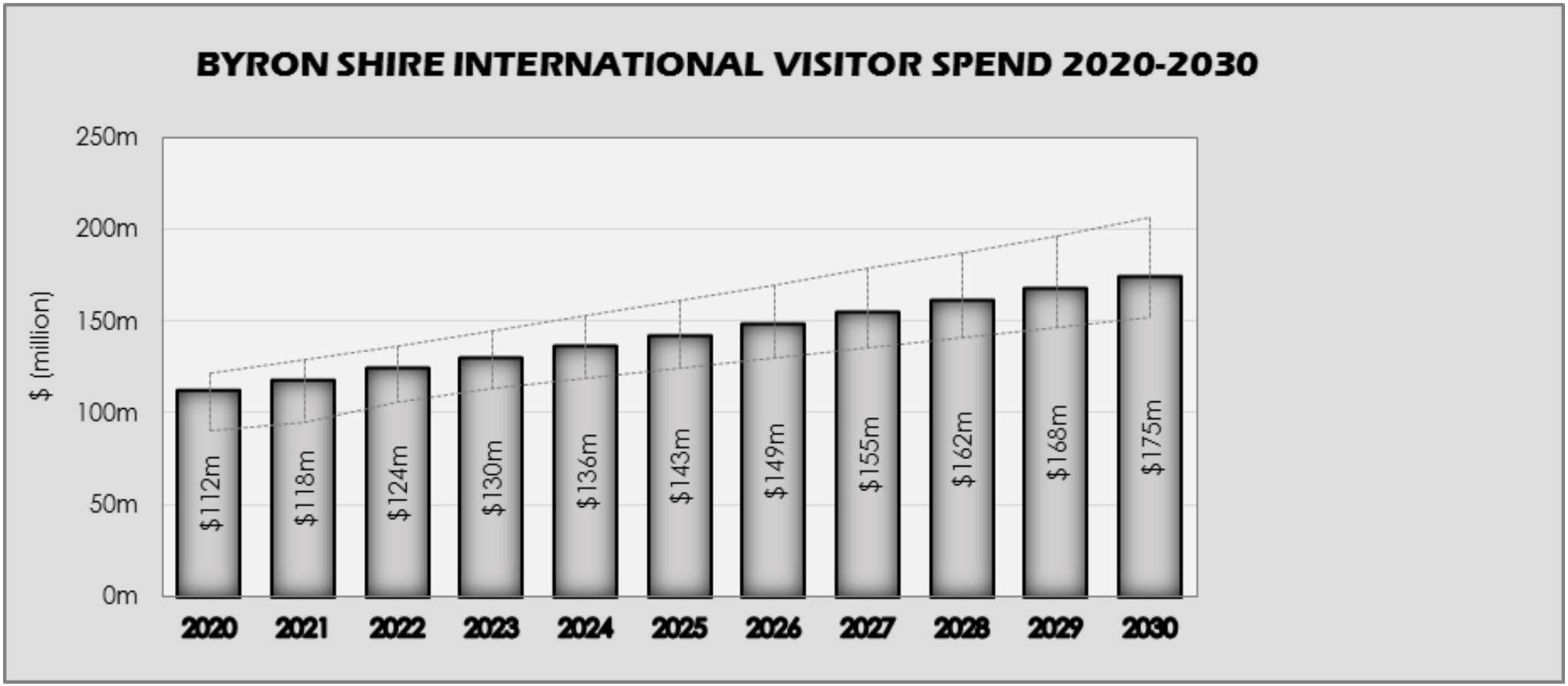


Figure 23: International overnight visitor spend forecast 2020 - 2030

Key summary: If long term spend per visit trends continue, international overnight visitors would spend an average of $143m each year ($39m more than the total in 2018). It would not take much of an increase in this growth rate for the average to exceed $160m in each year.