

MULTI USE OF THE BYRON SHIRE RAIL CORRIDOR

Tourism Numbers

6th June 2019



DeltaPearl
Partners

Reactivation and Multi Use of the Byron Shire Rail Corridor – Tourism Numbers

Final Report

4 July 2019

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1. Executive summary

1.1. SNAPSHOT OF TOURISM IN BYRON SHIRE

Byron Shire is a key tourism destination in Australia, with unique attractions such as beaches, active sports (surfing, cycling, etc.), farmers markets, the hinterland, health and wellbeing destinations, and many festivals (e.g. Splendour in the Grass, Byron Bay Bluesfest and Falls Festival). Tourism is a major contributor to the Byron Shire region, injecting over \$700 million into local businesses¹.

According to Tourism Research Australia (TRA), over 2 million people visit Byron Shire each year, which range from domestic day visitors to overseas tourists. In 2018, there were:

- 201,000 international overnight visitors (1,315,000 international visitor nights)
- 818,000 domestic overnight visitors (2,733,000 domestic visitor nights)
- 1,024,000 domestic day visitors.

Recently, Byron's growth in visitor numbers has outpaced that of NSW. International visitor nights are forecast to grow by 900,000 over the next decade, and domestic night stays by 700,000.

Tourism provides the largest industry of employment in Byron Shire, accounting for 23 per cent of Byron's jobs (3,506 jobs) and 14.1 per cent of output/sales (\$463 million) in 2016/17.

This report identifies:

- Visitor characteristics and trends attributed to international visitors, domestic and overnight visitors, and domestic daytrips
- Tourism Research Australia key tourism metrics from 2014-2017
- Reasons for visiting Byron Shire and accommodation utilised
- How tourists reach Byron Shire and where they visit.

¹ Destination Byron, 2017. Byron Bay Visitor Economy Snapshot. Available at <https://www.destinationbyron.com.au/research/>

1.2. Visitor characteristics and trends

1.2.1. International visitors:

Over the last 5 years, there were 966,827 international visitors to the Byron Shire, who stayed, on average, 7.1 nights in the Byron Shire. The majority came for a holiday (73 per cent), followed by visiting friends and family (11.7 per cent). Those visiting friends and family stayed (7.1 days) compared with holidaymakers (6.4 nights). The longest stays (between 10 and 14 days) were associated with visits for reasons of education, 'other' unspecified reasons and employment (sourced from Tourism Research Australia, National and International Visitor Surveys). Approximately 38 per cent of international visitors are British (23 per cent) or German (15 per cent).

Trends: Over the five years from 2011/12 to 2016/17, both the number of international visitors and visitor nights has increased.

1.2.2. Domestic overnight visitors:

Over the last 5 years (through to 2016/17), there were 3,830,484 domestic overnight visitors to the Byron Shire who stayed, on average, 3.6 days. Again, most visited for a holiday (68.1 per cent), followed by visiting friends and family (23 per cent). Those visiting friends and family stayed (3.2 days) compared with holidaymakers (3.4 days).

Roughly 53 per cent of domestic overnight visitors come from either Brisbane (30 per cent) or Sydney (23 per cent).

Trends: Since 2011/12, annual changes in visitor nights has varied considerably, from 11.0 per cent to 33.2 per cent. In 2016/17, there was a 13.5 per cent increase in visitor nights from the previous year, followed by a 7.7 per cent decrease².

1.2.3. Domestic daytrips:

Over the 5 years through 2016/17, there were 4,616,907 domestic day trip visitors to the Byron Shire. For most domestic daytrip visitors, the main purpose in visiting Byron Shire was for a holiday (72.5 per cent), followed by visiting friends and family (19.4 per cent).

Trends: Over the six years through 2017/18, the number of visitors has almost doubled, from 535,000 to 1,024,000 annual visitors. Annual growth has been high in general; 2016/17 saw a growth in daytrip visitors of 20.8 per cent compared with the previous year. However, this was followed by a slight decrease of 6.8 per cent.

1.2.4. Tourist visitor comparison: domestic and international visitor nights and Domestic daytrip Visitors

Figure 1 compares domestic and international visitor nights with domestic daytrips over the past five years. All three indicators have increased over the five year period, regardless of small dips in domestic visitor nights in 2012/13 and 2015/16.

As the figure shows, domestic daytrip visitors are significantly less than domestic and international visitor nights. Domestic daytrips only account for less than 20 per cent of the total visitor days spent in Byron when taking visitor nights as a proxy for visitor days.

² Tourism Research Australia, Unpublished data from the International Visitor Survey 2017/18.

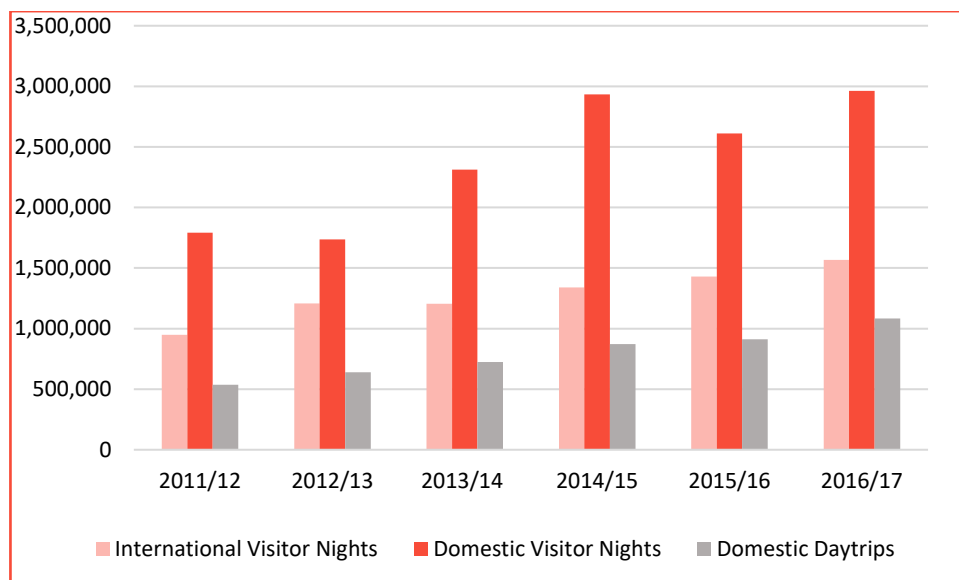


Figure 1: Key International and Domestic Visitor nights and domestic day trips, Byron Shire 2011/12 to 2016/17

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17.

1.3. Tourism metrics

Table 1 shows the key tourism metrics for Byron Shire. International visitors accounted for 10.3 per cent of total visitors, with domestic visitors accounting for 89.7 per cent (with domestic overnight and day visitors accounting for 40.2 per cent and 49.5 per cent of total visitors, respectively). International visitors accounted for 1.4 million visitor nights, or 33.6 per cent of total visitor nights in Byron Shire. Domestic visitors accounted for the largest proportion, 66.4 per cent, of visitor nights (2.766 million nights).

Table 1: Tourism Research Australia key tourism metrics for Byron Shire (4-year average from 2014-2017)

	International	Domestic overnight	Domestic day	Total
Visitors ('000)	194	758	933	1,855
Nights ('000)	1,400	2,766	-	4,165
Average stay (nights, rounded)	7	4	-	-
Spend (\$m)	92	481	82	656
Average spend per trip (\$)	476	635	88	348
Average spend per night (\$)	66	174	-	138
Average spend (commercial accommodation) per night (\$)	71	234	-	173

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17.

NB: Figures stated above differ from 2017 (Destination Byron figures). We have used these figures because they are useful in comparing the LGAs within the Northern Rivers.

International visitors tended to stay more nights in Byron Shire than domestic overnight visitors (7 nights versus 4 nights). However, domestic overnight visitors tended to spend more than international visitors. Domestic day visitors average spend per trip was significantly lower than the spends of international and domestic overnight visitors, at \$88 per day.

1.3.1. Reasons for visiting Byron Shire

For all visitors, the top reason was for a holiday, followed by visiting friends and family. Most international visitors travelled unaccompanied, whereas most domestic overnight visitors travelled with friends/relatives or as a couple.

1.3.2. Accommodation utilised

Most international visitors used 'other' (not specified) accommodation (499,000 nights, or 36 per cent of total international visitor accommodation nights), followed by backpacker accommodation (471,000 accommodation nights, 34 per cent) or stayed with a friend or relative (219,000 nights, 16 per cent) (sourced from Tourism Research Australia, National and International Visitor Surveys).

A significant proportion of domestic overnight visitors also stayed in the homes of friends and family (734,000, or 27 per cent of domestic overnight visitor nights). They were much less likely than international travellers to use backpacker accommodation and much more likely to use hotel accommodation (17 per cent of domestic visitor nights), although many also used caravan/camping accommodation (15 per cent of domestic visitor nights) (sourced from Tourism Research Australia, National and International Visitor Surveys).

1.4. How tourists reach Byron Shire and where they visit

1.4.1. Airports

Ballina Airport caters to half a million passengers each year and over the last five years was the fastest growing airport amongst Australia's top 20.³ In addition, many international visitors arrive from the Gold Coast Airport.

A Tourism Research Australia survey found that 72 per cent of visitors to the region were self-drive, with 15 per cent travelling by air transport and 11 per cent by bus or coach. More than a third (36 per cent) of international visitors travelled to the region by bus/coach.⁴

1.4.2. Where tourists visit

Tourism attractions are centred around Mullumbimby, Byron Bay, Brunswick Heads and Bangalow. These towns are assumed to attract the majority of both domestic and international visitors. Most visitors arrive from the Gold Coast Airport.

1.4.3. Community and infrastructure

Byron Shire's enumerated population is larger than its resident population. Based on the 2016 Census, Byron Shire had a population of 33,624, 6.6 per cent higher than its usual resident population (31,556), equivalent to over 2,000 extra people.

Although there are benefits from tourism, peak visitor periods can cause considerable congestion costs. Both anecdotal evidence and traffic count data indicate increased congestion on Byron Bay roads, particularly during festivals.

³ BITRE, Airport Traffic data 2018.

⁴ Byron Shire Visitor Profile and Satisfaction Report: Summary and Discussion of Results, Tourism Research Australia 2011, <http://www.destinationnsw.com.au/wp-content/uploads/2014/05/Byron.pdf?x15361>

2. Snapshot of tourism in Byron Shire – Employment benefits and effects on Community and Infrastructure

2.1. Employment and output/sales

Tourism is highly significant in terms of employment, as it is the largest employer in Byron Shire. In 2016/17, tourism and hospitality generated 23 per cent of Byron Shire's jobs (3,506 jobs) and 14.1 per cent of output/sales (\$463 million). Tourism and hospitality output/sales grew by \$57 million or 14 per cent between 2007 and 2017. Tourism output has grown faster than in benchmark local government areas (LGAs) (Figure 2).

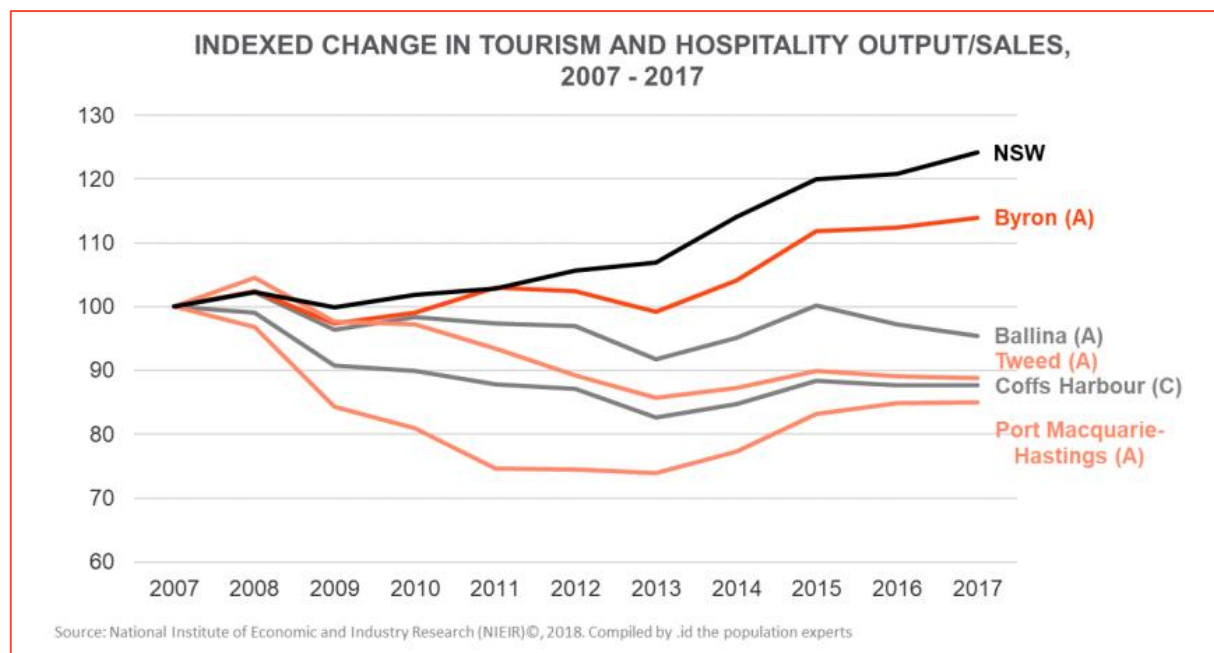


Figure 2: Comparison of indexed tourism output and sales of Byron to other NSW LGAs 2007 - 2017

2.2. Community and infrastructure impacts

Byron Shire's enumerated population is larger than its resident population. Based on the 2016 Census, Byron had a population of 33,624, which is 6.6 per cent higher than its usual resident population (31,556), equivalent to over 2000 extra people.

Although there are benefits from tourism, peak visitor periods can cause considerable congestion costs. Both anecdotal evidence and traffic count data indicate increased congestion on Byron Bay roads, particularly during festivals.

As previously mentioned, Byron Shire has a high number of tourists/visitors⁵ of which a high proportion are reliant on road vehicles to commute to events, activities and facilities within the Byron Shire. This additional traffic burden creates congestion. Congestion has a number of costs to communities, including extra travel time, extra travel time variability (trip times become more uncertain), increased vehicle operating costs (primarily higher rates of fuel consumption), and poorer air quality (with vehicles under congested conditions emitting higher rates of pollutants).

⁵ Visitors include people travelling for business purposes.

3. Visitor characteristics and trends

3.1. International visitors

3.1.1. Characteristics

Table 1 below shows the number of international visitors to Byron Shire over the last 5 years. In total, there were 966,827 international visitors to the Byron Shire. International visitor average length of stay in the Byron Shire was 7.1 nights.

Table 2: International visitors – 5-year total, Byron Shire and 2012/13 to 2017/18

Main reason for trip	Visitors	per cent	Visitor nights	Average length of stay (days)
Visiting friends and relatives	113,242	11.7	800,384	7.1
Holiday	626,734	68.4	3,889,945	6.2
Business	18,685	1.9	675,160	5.1
Education	54,184	5.6	442,446	12.5
Employment	22,297	3.5	951,508	13.2
Other reason	120,582	12.5	6,854,036	7.9
Total	966,827	100	6,747,439	7.1

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17

For the vast majority of international visitors, their main purpose in visiting Byron Shire was for a holiday (73 per cent). On average, those visiting for a holiday stayed 6.2 days in Byron Shire, those staying for other reasons (12.5 per cent) stayed for 7.9 days followed by visiting friends and family (12.5 per cent). On average, those visiting for a holiday stayed 6.2 days in Byron Shire, whereas those visiting friends and family stayed longer, around 7.9 days whereas the 11.7 per cent visiting friends and relatives stayed around 7.1 days. The longest stays were associated with visits for reasons of employment⁶ (13.2 days) or education (12.5 days). Approximately 38 per cent of international visitors are British (23 per cent) or German (15 per cent).

3.1.2. Trends

Table 3 shows the change in the number of international visitors to Byron Shire since 2013/14. Since 2013/14 the number of visitors and well as visitor nights has increased up to 2017/18, with the latest data available. In 2017/18 there were 202,899 international visitors to the Byron Shire, and 1,315,318 visitor nights. The average length stayed was at 7.3 days from 2013/14 until 2016/2017 and dropped back to 6.5 days in 2017/18.

⁶ Notably there are many individuals working where a visa requires them to work in regional areas.

Table 3: International visitors, Byron Shire 2013/14 to 2017/18

Year	Visitors	Visitor nights	Per cent change from previous year*	Average length of stay (days)	Visitors
2017/18	202,899	1,315,318	-16.0		5,749,551
2016/17	215,212	1,565,916	+9.6	7.3	5,382,276
2015/16	195,104	1,428,374	+6.6	7.3	4,833,516
2014/15	184,506	1,340,449	+11.3	7.3	4,403,847
2013/14	169,103	1,203,978	-0.4	7.1	4,156,870

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2017/18.

3.2. Domestic overnight visitors

3.2.1. Characteristics

Table 4 below shows the number of domestic overnight visitors to Byron Shire over the 5 years through 2017/18. In total, there were 3,829,261 domestic overnight visitors to the Byron Shire during this period. Their average length of stay in the Byron Shire was 3.5 days.

Table 4: Domestic overnight visitors – 5-year total, Byron Shire 2013/14 to 2016/17

Main reason for trip	Visitors	per cent	Visitor nights	Average length of stay (days)
Visiting friends and relatives	881,991	23.0	2,835,932	3.2
Holiday	2,606,721	68.1	9,358,550	3.6
Business	246,803	6.4	833,684	3.4
Other reason				
Total	3,829,261	100.0	13,553,595	3.5

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2017/18

For most domestic overnight visitors, the main purpose in visiting Byron Shire was for a holiday (68.1 per cent), followed by visiting friends and family (23 per cent). On average, those visiting for a holiday stayed 3.6 days in Byron Shire, whereas those visiting friends and family stayed around 3.2 days.

It can also be seen that a small fraction of domestic overnight travel to Byron Shire (6.4 per cent) is for business purposes. This data indicated that Byron Shire is a significant state tourist region, attracting more people through holiday attractions than relatives and friends or business. Roughly 53 per cent of domestic overnight visitors come from either Brisbane (30 per cent) or Sydney (23 per cent).

3.2.2. Trends

Table 5 shows the change in the number of domestic overnight visitors and visitor nights to Byron Shire since 2013/14. Annual changes in visitor nights has varied considerably, from -11 per cent to 33.2 per cent.

Table 5: Domestic overnight visitors, Byron Shire 2011/12 to 2016/17

	Visitors	Visitor nights	Per cent change from previous year*	Average length of stay (days)
5-year average	765,856	2,710,719		3.6
2017/2018	837,035	2,733,456	-7.7	3.3
2016/17	835,026	2,962,524	+13.5	3.5
2015/16	783,060	2,610,822	-11.0	3.3
2014/15	783,102	2,934,065	+26.9	3.8
2013/14	602,261	2,312,726	+33.2	3.8

Source: Tourism Research Australia, unpublished data from the International Visitor Survey 2016/17.

* % change from previous year – visitor nights

3.3. Domestic daytrip visitors

3.3.1. Characteristics

Table 6 below shows the number of domestic daytrip visitors to Byron Shire over the 5 years through 2016/17. In total, there were 4,616,907 domestic day trippers to the Byron Shire.

Table 6: Domestic daytrip visitors – 5-year total Byron Shire 2013/14 to 2017/18

Main reason for trip	Visitors	Per cent
Visiting friends and relatives	874,852	18.9
Holiday	3,366,549	72.9
Business		
Other reason		
Total	4,616,910	100

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17

For most domestic daytrip visitors, the main purpose in visiting Byron Shire was for a holiday (72.9 per cent), followed by visiting friends and family (18.9 per cent).

3.3.2. Trends

Table 7 shows the change in the number of domestic daytrip visitors to Byron Shire since 2013/14. Annual day trip visitors have increased each year, with exception of 2017/18 which decreased by 5.4 per cent on 2016/17.

Table 7: Domestic daytrip visitors, Byron Shire and NSW, 2013/14 to 2017/18

	Visitors	Per cent change from previous year*
2013/14	722,756	+13.0
2015/15	872,676722,756	+20.7
2015/16	911,602	+4.5
2016/17	1,084,298	+18.9
2017/18	1,025,575	-5.4
5-year average	923,381	

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17

3.4. Tourist visitor comparison

Table 8 provides a comparison of domestic, international visitor nights and day trip visitors over the past five years. The analysis (below) uses visitor nights as a proxy for days spent in Byron Shire, and as such is comparable to daytrips.

Table 8: International and Domestic Visitor Nights, Domestic Daytrip Visitors, Byron Shire, 2013/14 - 2017/18

Year	International Visitor Nights	Domestic Visitor Nights	Domestic Daytrips Visitors
2013/14	1,203,979	2,312,726	722,756
2014/15	1,340,449	2,934,066	872,677
2015/16	1,428,375	2,610,823	911,602
2016/17	1,565,916	2,962,525	1,084,298
2017/18	1,315,318	2,733,456	1,025,576

Source: Tourism Research Australia, Unpublished data from the National Visitor Survey and International Visitor Survey 2016/17

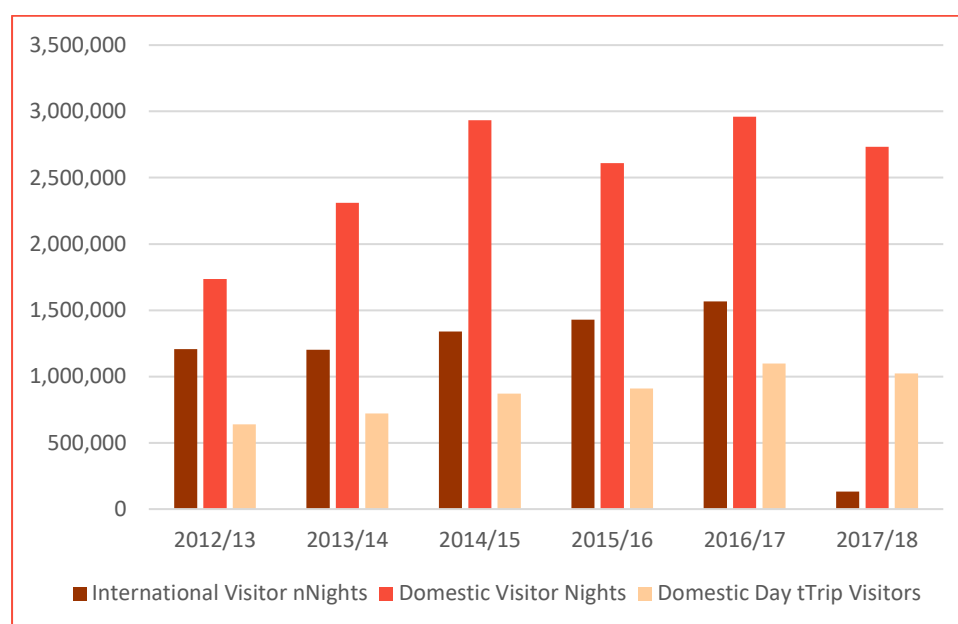


Figure 3: International and Domestic Visitors Nights and domestic daytrip Visitors, Byron Shire 2011/12 to 2017/18

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2017/18.

In the Byron Shire, domestic visitor nights reached a peak in 2016/17 of 2.96 million nights, with the second highest number of nights (2.93 million) being recorded in 2014/15. International visitor nights also peaked in 2016/17 (1.57 million nights), growing consistently since 2013/14. Domestic daytrips were at their highest in 2016/17 (1.08 million), growing steadily over the preceding five years.

As can be seen from Figure 3, domestic daytrip visitors are significantly less than domestic and international visitor nights. Domestic daytrips only account for less than 20 per cent of the total visitor days spent in Byron when taking visitor nights as a proxy for visitor days.

4. Tourism metrics

Table 9 shows the key tourism metrics for Byron Shire. It shows that over the four years from 2014–2017⁷ there were on average 2.1 million visitors to Byron Shire per year. Of these, there were 194,000 international visitors, compared with 758,000 domestic overnight visitors and 933,000 domestic day visitors. That is, international visitors accounted for 10.3 per cent of total visitors, with domestic visitors accounting for 89.7 per cent (with domestic overnight and day visitors accounting for 40.2 per cent and 49.5 per cent of total visitors, respectively).

Additionally, according to Tourism Research Australia (TRA), over 2 million people visit Byron Shire each year, which range from domestic day visitors to overseas tourists. In 2018, there were:

- 201,000 international overnight visitors (1,315,000 international visitor nights)
- 818,000 domestic overnight visitors (2,733,000 domestic visitor nights)
- 1,024,000 domestic day visitors.

International visitors accounted for 1.4 million visitor nights, or 33.6 per cent of total visitor nights in Byron Shire. Domestic visitors accounted for the largest proportion, 66.4 per cent, of visitor nights (2.766 million nights).

International visitors tended to stay more nights in Byron Shire than domestic overnight visitors (7 nights versus 4 nights). However, domestic overnight visitors tended to spend more than international visitors, with an average spend per trip of \$635 for domestic versus \$476 for international visitors and per night of \$174 and \$66, respectively. Domestic overnight travellers also tended to spend more on accommodation per night, with an average spend of \$234 per night compared with \$71 for international visitors. Domestic day visitors average spend per trip was significantly lower than the spends of international and domestic overnight visitors, at \$88 per day.

Table 9: Tourism Research Australia key tourism metrics for Byron Shire (4-year average from 2014-2017)

	International	Domestic overnight	Domestic day	Total
Visitors ('000)	194	758	933	1,855
Nights ('000)	1,400	2,766	-	4,165
Average stay (nights, rounded)	7	4	-	-
Spend (\$m)	92	481	82	656
Average spend per trip (\$)	476	635	88	348
Average spend per night (\$)	66	174	-	138
Average spend (commercial accommodation) per night (\$)	71	234	-	173

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17.

NB: Figures stated above differ from 2017 (Destination Byron figures). We have used these figures because they are useful in comparing the LGAs within the Northern Rivers.

⁷ 2016/2017 data has been applied in the Economic analysis.

Table 10 shows the reasons that people visited Byron Shire. For all visitors, the top reason was for a holiday, followed by visiting friends and family. Most international visitors travelled unaccompanied, whereas most domestic overnight visitors travelled with friends/relatives or as a couple.

In terms of accommodation nights, most international visitors used 'other' (not specified) accommodation (499,000 nights, or 36 per cent of total international visitor accommodation nights), followed by backpacker accommodation (471,000 accommodation nights, 34 per cent) or stayed with a friend or relative (219,000 nights, 16 per cent). The use of backpacker accommodation may contribute to explaining the lower average spend per night of international visitors compared with domestic overnight visitors, as shown in Table 4. However, a significant proportion of domestic overnight visitors also stayed in the homes of friends and family — this was second largest category of accommodation nights for this group (734,000, or 27 per cent of domestic overnight visitor nights), following 'other' (unspecified) accommodation (39 per cent of total domestic overnight visitor nights). Domestic overnight visitors were much less likely than international travellers to use backpacker accommodation and much more likely to use hotel accommodation (17 per cent of domestic visitor nights), although many also used caravan/camping accommodation (15 per cent of domestic visitor nights).

Table 10: Byron Shire, Reasons for visits and accommodation utilized 2016/17

Visitors to Byron (A)	International	Domestic Overnight	Domestic Day	Total
Reason (visitors '000)				
Holiday	179	512	679	1,370
Visiting friends or relatives	11	183	191	385
Business	np	47	np	np
Other	3	np	np	np
Travel party type (visitors '000)				
Unaccompanied	112	132	-	244
Couple	36	228	-	264
Family group	11	104	-	115
Friends/relatives travelling together	34	279	-	313
Accommodation (nights '000)				
Hotel or similar	92	464	-	555
Home of friend or relative	219	734	-	953
Commercial camping/caravan park	119	407	-	526
Backpacker	471	82	-	553
Other	499	1,072	-	1,571

Source: Tourism Research Australia, Unpublished data from the International Visitor Survey 2016/17

4.1. Analysis

Population centres in the Byron Shire are spread relatively evenly, with two townships (Ocean Shores, Byron Bay) having a population over 5,000 (see Table 11). However, tourism attractions are centred around Mullumbimby, Byron Bay, Brunswick Heads and Bangalow. These towns are assumed to attract the majority of both domestic and international visitors. Most visitors arrive from the Gold Coast Airport.

Table 11: Locality/stations along railway corridor with associated populations

Locality/Station	Population
Yelgun	213
Ocean Shores ⁽¹⁾	5,355
Mullumbimby	3,569
Myocum	985
Tyagarah	152
Quarry Siding ⁽²⁾	825
Byron Bay ⁽⁴⁾	5,521
St Helena ⁽³⁾	239
Bangalow	2,021
Total	18,880

1. Includes populations Billinudgel & Ocean Shores
2. Population from Ewingsdale
3. Includes populations from Hayters Hill, McLeods Shoot and Talofa
4. Includes populations of Byron Bay and Suffolk Park

Source: Tourism Research Australia, National and International Visitor Surveys

5. How tourists reach Byron Shire

5.1. Airports

Around 15 per cent of tourists in Byron Shire arrive via air transport.⁸ Byron Shire is accessible from three different airports, within two hours' drive:

- The Ballina Byron Bay Gateway Airport in Ballina, from which shuttle buses travel to Byron Shire in around 35 minutes; Ballina Byron Gateway Airport caters to half a million passengers each year and over the last five years was the fastest growing airport amongst Australia's top 20⁹
- the Gold Coast Airport situated at Coolangatta on the Queensland/NSW border, which is 40 minutes from Byron Bay; it receives over 420 flights per week from destinations across Australia, New Zealand, Asia and beyond. Regular domestic services are provided by Jetstar, Virgin Australia, Tigerair and Qantas. The Gold Coast – Brisbane Airport TransLink line provides travellers with the opportunity to stay on the one train between airports. The travellers can either hire cars or take Gold Coast Airport shuttle busses. Shuttle buses connect to Byron Shire direct from the terminal. In 2016/17, 7 per cent of international visitors to Byron Shire entered Australia from the Gold Coast Airport.¹⁰
- Brisbane International and Domestic Airport at Eagle Farm on the eastern side of Brisbane is served by all domestic and most international carriers. There are also direct shuttles to Byron Shire, which take around two hours.

5.2. Self-drive and public transport

A Tourism Research Australia survey found that 72 per cent of visitors to the region were self-drive. In total, 26 per cent of tourists are not self-drive, with 15 per cent arriving by air, 11 per cent by bus/coach and 1 per cent by railway. More than a third (36 per cent) of international visitors travelled to the region by bus/coach.¹¹

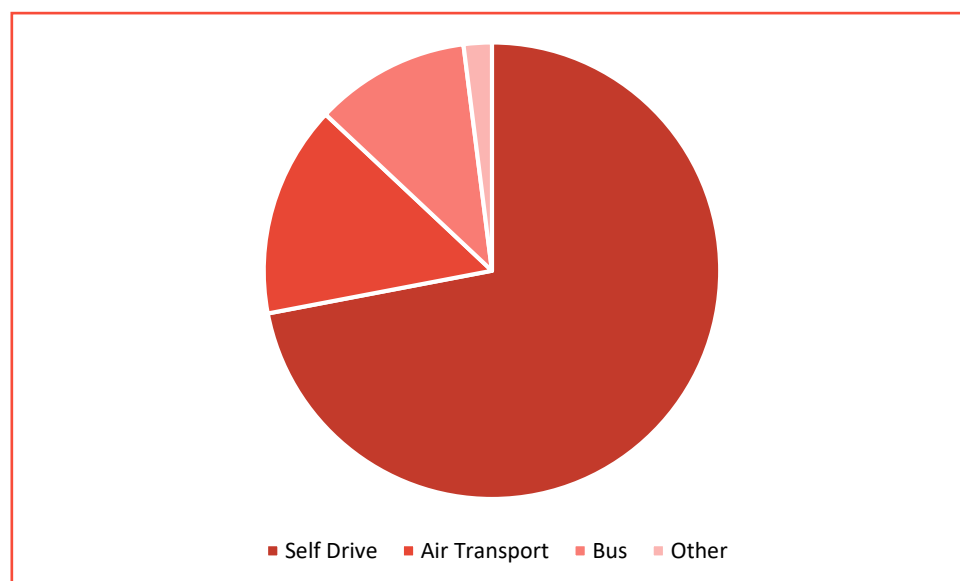


Figure 4: How tourists currently reach Byron Shire - transport options used

Source: Tourism Research Australia, Byron Shire Tourism Visitor Profile and Satisfaction Survey

⁸ Byron Shire Visitor Profile and Satisfaction Report: Summary and Discussion of Results, Tourism Research Australia 2011.

⁹ BITRE, Airport Traffic data 2018

¹⁰ Byron-Shire-Council-Tourism-scale-and-impact-analysis-November-2018

¹¹ Byron Shire Visitor Profile and Satisfaction Report: Summary and Discussion of Results, Tourism Research Australia 2011. The inclusion of the proportion of rental car hires from the airport will be undertaken in further developments for this project.

5.3. Where tourists visit

Tourism attractions are centred around Mullumbimby, Byron Bay, Brunswick Heads and Bangalow. These towns are assumed to attract the majority of both domestic and international visitors. Most visitors arrive from the Gold Coast Airport.

5.4. Analysis

As noted above, Byron Shire's actual enumerated population is a lot larger than its resident population, by around 2,000 extra people, as a result of the tourism influx. Although there are benefits from tourism, peak visitor periods can cause considerable congestion costs, particularly given that over 70 per cent of tourists are self-drive tourists. Both anecdotal evidence and traffic count data indicate increased congestion on Byron Shire roads, particularly during festivals, with social and environmental costs for both tourists and residents.

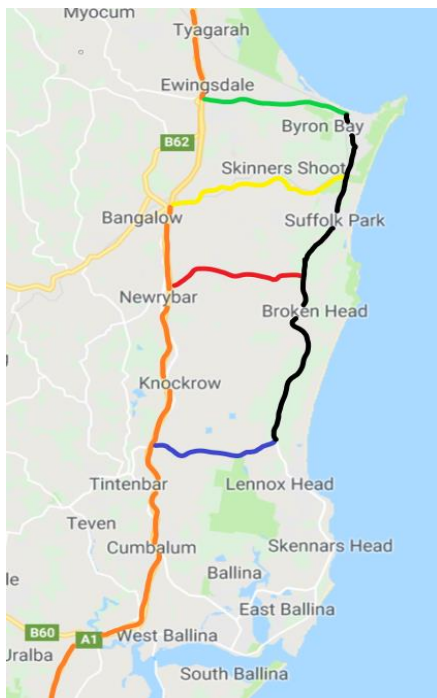


Figure 5: Popular routes into Byron Bay

Approximate travel distances from M1 to Byron Bay using:

Route	length	Colour
Ewingsdale Road (from North)	6.2 km	Green
Bangalow Road (from south)	11.8 km	Yellow ⁽¹⁾
Midgen Flat Road (from south)	17.0 km	Red ⁽¹⁾
Ross Lane (from south)	23.2 km	Blue ⁽¹⁾

1. Black outlined road is used for multiple routes

A 2014/15 Visitor Survey of visitors to Byron found that, while visitors were very satisfied with the experiences in Byron Shire overall, 25 per cent were dissatisfied with the level of local traffic in Byron Bay, with comments on the surveys indicating that the issues were mainly around traffic congestion in Byron Bay in general.¹² Other reasons for dissatisfaction were parking (27 per cent dissatisfied); issues were noted around the cost of parking, lack of parking and signage about parking and local roads (15 per cent dissatisfied), with issues noted around the general state of the roads. These dissatisfactions may indicate willingness to consider public transport options along the rail transport corridor. However, it is not possible to accurately estimate the number of tourists who might switch to a rail corridor transport option to avoid congestion without further studies.

The above would indicate that the tourist visiting Byron Shire would greatly benefit from an alternative form of transport in the corridor. Providing a transport solution which links the three main tourist destinations Mullumbimby, Byron Bay, and Bangalow and accommodation centres such as Ocean Drive would enhance the experience in the Byron Shire for the tourist. A transport solution which connects these centres seamlessly and provides the flexibility to connect the corridor directly with accommodation and attraction facilities would reduce the requirement to self-drive, this would relieve congestion on Byron Shire roads as well as providing transport for people to further enjoy the facilities on hand without being concerned about drink driving regulations, parking and other driving constraints.

¹² <http://www.destinationnsw.com.au/wp-content/uploads/2014/05/Byron.pdf?x15361>

