

Technical Paper

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Economic Impact Assessment



North Byron Parklands

Economic Impact Assessment

10 June 2010

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Report No: **PR102495**

Version/Date: **Final, June 2010**

Contents

EXECUTIVE SUMMARY	3
INTRODUCTION	5
1 ECONOMIC OVERVIEW	6
1.1 Introduction	6
1.2 Demographic Trends	6
1.3 Economic Overview	8
1.4 Tourist Overview	12
1.5 Implications	15
2 NORTH BYRON PARKLANDS	16
2.1 Introduction	16
2.2 North Byron Parklands	16
2.3 Proposed Uses	17
2.4 Proposed Events	17
2.5 Implications	17
3 ECONOMIC AND EMPLOYMENT ANALYSIS	19
3.1 Introduction	19
3.2 Assumptions and Data Inputs	19
3.3 Tourism	23
3.4 Expenditure	24
3.5 Employment	27
3.6 Income	27
3.7 Regional Multiplier Effects	27
3.8 Implications	29
4 BENEFIT ASSESSMENT	31
4.1 Introduction	31
4.2 Benefit Assessment	31
4.3 Conclusion	34
ASSUMPTIONS	35
APPENDIX	36
APPENDIX	39

Executive Summary

Byron Shire and Byron Bay in particular, is considered to be one of the most popular tourism destinations within the Northern Rivers. The area comprises a high provision of short stay accommodation, retail and food and beverage options for visitors.

The economic profile of Byron shows that the Shire is heavily reliant on tourism. This reliance is strongly supported by the visual amenity of Byron Bay and the coast, and a warm climate year round. Byron Shire has a higher than average provision of employment within the Accommodation and Food Services and Retail Trade industries which can be directly related to the development of Byron Shire, with Byron Bay in particular, as a tourist destination.

The proportion of Cultural and Recreational Services businesses in the Byron Shire is 6%, which is significantly higher than the national average of 1.2% of all businesses. In addition, there is a significantly higher proportion of non-employing Cultural and Recreational Service businesses in Byron Shire (71%) than the national average (63%). However, at current this industry sector is essentially hobby / lifestyle focused, and provides only a minimal proportion of the employment opportunities available within Byron Shire (2%).

There is the potential for Cultural and Recreational Services to become a strong economic driver within the local and regional area. The potential for this cultural asset to be developed into a significant economic driver in the local and regional economy will dependent on the provision of sufficient investment into the Cultural sector.

The North Byron Parklands are proposed to provide a permanent cultural arts and event space in the north east corner of Byron Shire in Yelgun. This is due to Belongil Fields, the traditional site of festivals such as Bluesfest and Splendour in the Grass, being proposed for imminent residential development. In order to provide a permanent venue for Splendour in the Grass in the Byron Shire, the Billinudgel Property Trust was formed and purchased this 256 Ha property with the intent to create a cultural arts and event space for the people of Byron Shire and this region.

As a cultural arts and event space, North Byron Parklands will include a conference centre, cultural centre, a mix of restoration and agricultural uses and event space. A number of events are proposed to occur in limited times per year, including, Minor, Small, Moderate and Major events, catering from less than 300 patrons to over 10,000 patrons.

The establishment of the North Byron Parklands will generate significant economic benefits to the Byron Shire, Northern Rivers Region and New South Wales. This includes an increase in direct employment for the maintenance and management of the North Byron Parklands as well as the organisation of the proposed events at the facility. This is anticipated to generate 20.5 EFT jobs for the maintenance and management of the North Byron Parklands, with events estimated to generate an additional 145 EFT jobs in the first year of operation, increasing to 210 EFT jobs in the fifth year of operation.

The increased capacity for events at the facility will generate a significant increase in visitors to the area such as day trippers for Minor and Small events and overnighters for Moderate and Major events. Based on the

proposed capacities for these events, it is anticipated that these events will attract approximately 12,577 day trippers in the first year of operation, increasing to 22,907 in the fifth year of operation. In addition, approximately 70,815 visitor nights will be generated in the first year of operation, increasing to 97,418 in the fifth year of operation.

Other benefits that can directly be attributed to the local, regional and state include:

	Byron Shire	Northern Rivers Region	New South Wales
Direct Expenditure	\$2,976,550 in Year 1	\$3,654,900 in Year 1	\$3,994,150 in Year 1
	\$818,530 in Year 5	\$878,260 in Year 5	\$910,610 in Year 5
Indirect Expenditure	\$5,986,763 in Year 1	\$8,977,284 in Year 1	\$8,114,388 in Year 1
	\$8,511,943 in Year 5	\$12,566,728 in Year 5	\$11,375,664 in Year 5

The direct expenditure indicated comprises construction costs (which is why this expenditure is higher in year one) and events related expenditure. The indirect expenditure indicates expenditure of event attendees on accommodation, food and other expense items/activities.

A summary of the full range of benefits including those direct and indirect benefits (Initial Effects) and the associated economic multiplier effects for the proposed North Byron Parkland facility and associated events is indicated in the table below. These economic multiplier effects indicate the extent of intra-industry flows for both output and employment as a result of the initial increase in output, which in this instance is related to the North Byron Parklands facility and the associated events.

	Industry Output				Employment (EFT jobs)			
	Initial Effects	Production Induced Effects	Consumption Induced Effects	Total Effects	Initial Effects	Production Induced Effects	Consumption Induced Effects	Total Effects
Year 1	\$25,270,834	\$34,866,734	\$60,137,568	\$120,275,136	221	228	380	829
Year 2	\$33,148,398	\$45,779,366	\$78,927,764	\$157,855,528	227	234	391	852
Year 3	\$35,521,774	\$48,447,838	\$83,969,612	\$167,939,224	255	252	427	934
Year 4	\$37,426,804	\$50,749,501	\$88,176,306	\$176,352,611	279	272	462	1,013
Year 5	\$40,877,338	\$55,429,457	\$96,306,794	\$192,613,589	303	295	503	1,101

Source: RPS and provided data

The proposed North Byron Parklands facility will generate substantial and significant economic benefits for Byron Shire, the Northern Rivers Region and New South Wales. These economic benefits will be realised throughout a broad range of industries that will be supportive to the North Byron Parklands facility, particularly the arts, cultural and recreational services industries. As previously mentioned, these industries are currently represented predominantly by non commercial business activities which while it has established a very strong culture within the region it does little to supplement the economy. The investment generated by the North Byron Parklands facility will provide a strong catalyst for economic growth and development within these industry sectors which has the potential to become a significant economic driver and contributor within the Byron Shire economy over the long term.

On the basis of the economic benefits indicated through this report, it is considered that the proposed North Byron Parklands facility will be a significant contributor to the Byron Shire, Northern Rivers region and New South Wales economies.

Introduction

This report was commissioned by Billinudgel Property Trust in January 2010. The client has requested RPS Economics to prepare an Economic Report for the proposed North Byron Parklands, Yelgun which will accompany the application to New South Wales Department of Planning. This report will investigate the economic impacts and benefits of the proposed North Byron Parklands at a local, regional and state level.

Objectives

The key objective of the economic modelling and final report is to identify the direct and indirect, as well as qualitative and quantitative, benefits of the proposed North Byron Parklands on the local, regional, and state economies.

The economic analysis will highlight the following:

- Ongoing economic impact and benefit created by the North Byron Parklands
- Economic context of the North Byron Parklands as a venue, brand and tourist attractor
- Direct and indirect employment generation
- Broader economic development opportunities and capacity
- Broader community benefits

I Economic Overview

1.1 Introduction

North Byron Parklands is intended to be a key recreational, social and economic facility within the local area and region as a whole. The approval of the facility, which will build on Byron's reputation of hosting events of differing scales, will have an influence on the local, regional and state economies. The capacity of the North Byron Parklands to accommodate a range of events will influence the tourist market, employment generated and sustained by event organisation and increases to visitor numbers, as well as other economic influences.

This section provides an overview of Byron Shire and the Northern Rivers, including a detailed assessment of business and industry trends and tourism trends.

1.2 Demographic Trends

The demographic trends have been identified for Byron Shire, the Northern Rivers region, and New South Wales.

The Northern Rivers region comprises of the following Local Government Areas:

- Ballina;
- Byron;
- Clarence Valley;
- Lismore;
- Richmond Valley;
- Tweed; and
- Kyogle.

1.2.1 Resident Characteristics

The following presents key demographic characteristics for Byron Shire, in comparison to the Northern Rivers region and New South Wales demographic characteristics. This data has been based on the 2006 Australian Bureau of Statistics (ABS) Census.

- The proportion of children aged 0 to 19 years within Byron Shire (26.3%) is in line with the Northern Rivers (26.4%) and NSW (26.5%) averages.
- The proportion of people aged 20 to 34 years in Byron Shire (15.2%) and the Northern River region (13.9%) is lower than the average of 20.2% across NSW.
- Byron Shire has a higher proportion of residents aged 35 to 54 years old, with 34.2%, in comparison to Northern Rivers (28.8%) and NSW (28.4%).
- The proportion of people aged 55 years and older in the Byron Shire (24.3%) is in line with the NSW average of 24.8%. The Northern Rivers region has the highest proportion of older residents, accounting for 30.9% of the population.
- Byron Shire has the highest proportion of separate house dwellings (81.3%). This is higher than the Northern Rivers region (76.8%) and significantly higher than the NSW average of 71.4%. NSW has a

significantly higher proportion of flat, unit and apartment dwellings (17.7%), in comparison to Byron Shire (7%) and the Northern Rivers (9.2%).

- The proportion of dwellings that are either fully owned or being purchased directly in Byron Shire (64%) is lower than that of the Northern Rivers (68.6%) and NSW (66.7%). Byron Shire has a marginally higher proportion of dwellings which are being rented (31.3%).
- The average annual household income in the Byron Shire is substantially lower than NSW with \$55,676 compared with \$71,587 (March 2010 dollars). The Byron Shire average household income is marginally higher than the Northern Rivers average of \$52,978.
- The average monthly home loan repayments are significantly lower in the region than the NSW average (\$1,889), with \$1,581 in the Byron Shire and \$1,422 across the Northern Rivers.
- The proportion of Upper White Collar employees in Byron Shire (36.4%) is higher than that of the Northern Rivers (29.9%) and NSW (34.8%). Whereas the proportion of Lower White Collar employees in Byron Shire (31.3%) accounts for a lower proportion of employees in comparison to Northern Rivers (34%) and NSW (33.7%).

The demographic characteristics outlined above are indicative of an aging community with a high proportion of retiree aged people and many young people aged 20 to 34 leaving the Byron Shire to seek education and employment opportunities. The higher proportion of residents aged 35 to 54, in line with a higher proportion of Upper White Collar employees, illustrates that Byron Shire has an established upper class residential population.

A detailed demographic profile of Byron Shire, Northern Rivers and New South Wales is provided in Appendix A.

1.2.2 Population Projections

The estimated resident population (ERP) of Byron Shire in 2006 was approximately 30,700. The following provides an indication of the anticipated population growth within Byron Shire based on population projections published by the New South Wales Department of Health, which were produced in collaboration with the NSW Department of Planning.

Year	Population
2006	30,700
2011	32,983
2016	35,303
2021	37,688
2026	40,112
2031	42,528
2036	44,835

Based on the population projections presented above, the current population of Byron Shire is approximately 32,530 people. This population is expected to increase by an average of 463 people per year between 2010 and 2016. Between 2016 and 2026 the average annual population increase is expected to be approximately 481 people per year.

The current population of the Northern Rivers is approximately 293,999 people, and is anticipated to increase to approximately 376,000 people by 2036. Population growth is expected to occur at an average of 3,417 people per year between 2010 and 2016, reducing to an average of 3,325 people per year between 2016 and 2026.

The population of NSW is projected to increase by approximately 2 million people between 2006 and 2031, increasing from 6.8 million to 8.8 million people.

1.3 Economic Overview

The Byron Shire has a diversified economic base, with population serving industries and tourism related industries supporting the greatest proportion of employment. The following economic overview will assess the number of businesses by industry (including their size and turnover) and the level of employment by industry within Byron Shire.

1.3.1 Businesses by Industry

The ABS Count of Australian Businesses outlines the number of businesses within Byron Shire between June 2003 and June 2007.

According to the ABS Count of Australian Businesses (2007), within Byron Shire:

- Property and Business Services accounts for 22% of the total number of businesses.
- The Construction industry accounts for 15% of the total number of businesses.
- Retail Trade accounts for 12% of the total number of businesses.
- Agriculture, Forestry and Fishing accounts for 10% of the total number of businesses.
- Cultural and Recreational Services accounts for 6% of the total number of businesses.

In comparison to Byron Shire, the Northern Rivers Region has a varied business profile:

- Agriculture, Forestry and Fishing accounts for a higher proportion of Northern Rivers businesses with 21%.
- Property and Business Services accounts for a higher proportion of total businesses, with 17%.
- Construction businesses account for 15% of the total number of businesses.
- Retail Trade accounts for a similar proportion of business in the Northern Rivers, with 11%.
- Cultural and Recreational Services account for 5% of the total number of businesses, which is in line with Byron Shire business trends.

In comparison to Byron Shire and the Northern Rivers Region, the proportion of Cultural and Recreational Services business is significantly higher than the national average of 1.2% of all businesses.

The ABS Count of Businesses also provides an outline of the employment size of businesses within the Northern Rivers and Byron Shire, and illustrates that the majority of businesses within the Byron Shire (60%) and the Northern Rivers Region (62%) are non-employing. This is in line, albeit marginally higher than the national average of 58%. The industries with the highest proportion of non-employing businesses varies between the three areas varies slightly. The proportion of non-employing Cultural and Recreational Service businesses in Byron Shire (71%) is significantly higher than the national average (63%). This indicates that at current this industry sector is essentially hobby / lifestyle focused, and provides only a minimal proportion of the employment opportunities available within Byron Shire (2%).

Whilst Cultural and Recreation Service businesses in Byron Shire are not currently providing a high level of employment within the local economy, ABS data indicates that these businesses are performing well financially. The ABS Business Count indicates that annual turnover for Cultural and Recreation Services reached a peak of between \$500,000 and \$1 million in 2007. Therefore the few business entities within the local area which are supporting employment appear to be successful at generating reasonable levels of turnover.

A detailed outline of the number of businesses per industry, by employment size is located in Appendix B. Appendix B also provides an overview of businesses by industry within the Byron Shire by total annual turnover.

This Cultural and Recreational Service industry is essentially built on a strong cultural asset derived from the music and art 'scene' in Byron. Whilst the industry is currently based primarily on hobby and lifestyle activities, there is the potential for Cultural and Recreational Services to become a strong economic driver within the local and regional area. The potential for this cultural asset to be developed into a significant economic driver in the local and regional economy will dependent on the provision of sufficient investment into the Cultural sector.

1.3.2 Employment by Industry

The following trend analysis provides an overview of the types of industries and employment within Byron Shire and the Northern Rivers Region in 2006 based on the workforce population within each respective region. The trend analysis will highlight the number and proportion of people employed per industry.

Table 1.1 indicates the employment by industry within the Byron Shire and the Northern Rivers Region when compared to New South Wales, as indicated by the ABS 2006 Census.

Table 1.1
Working Population Profile - Industry of Employment

	Byron Shire		Northern Rivers		NSW	
Industry of Employment						
Accommodation & food services	1,484	14%	8,001	9%	175,509	7%
Administrative & support services	311	3%	1,959	2%	73,430	3%
Agriculture/ forestry & fishing	490	5%	5,490	6%	70,670	3%
Arts & recreation services	204	2%	1,193	1%	35,354	1%
Construction	869	8%	5,551	6%	141,589	5%
Education & training	804	7%	8,371	9%	206,684	8%
Electricity/ gas/ water & waste services	72	1%	795	1%	26,970	1%
Financial & insurance services	175	2%	1,852	2%	139,144	5%
Health care & social assistance	1,081	10%	12,318	14%	281,536	11%
Information media & telecommunications	177	2%	1,376	2%	63,482	2%
Manufacturing	929	9%	6,988	8%	255,285	10%
Mining	13	0%	131	0%	18,022	1%
Other services	394	4%	3,494	4%	99,783	4%
Professional/scientific & technical services	643	6%	3,746	4%	198,715	8%
Public administration & safety	392	4%	5,309	6%	158,769	6%
Rental/ hiring & real estate services	310	3%	1,726	2%	48,038	2%
Retail trade	1,598	15%	13,675	15%	301,702	12%
Transport/ postal & warehousing	282	3%	3,006	3%	125,842	5%
Wholesale trade	479	4%	2,940	3%	127,621	5%
Inadequately described/Not stated	123	1%	808	1%	29,419	1%
Total	10,830	100%	88,729	100%	2,577,564	100%

Source: ABS Census 2006, RPS

As outlined in Table 1.1, whilst the industry of employment characteristics of Byron Shire are in line with those of the Northern Rivers Region as whole, the Byron Shire characteristics are different from those of the New South Wales state averages.

The industry of employment data for Byron shows that the Shire is heavily reliant on Retail Trade (15%) and the tourism industry, with Accommodation and Food Services accounting for 14% of the working population. This is higher than the proportion of employment in the Northern Rivers (9%), and significantly higher than the state average (7%). Other significant industries of employment are Health Care and Social Assistance (10%), and Manufacturing (9%).

- The Northern Rivers has a higher proportion of the workforce employed in the Health Care and Social Assistance industry in comparison to Byron Shire and New South Wales.
- The proportion of financial services employment is lower in Byron Shire and the Northern Rivers Region in comparison to the state average.
- Construction accounts for a higher proportion of the workforce in Byron Shire than in the Northern Rivers and NSW.
- Retail trade is lower across New South Wales (12%) in comparison to Byron Shire and the Northern Rivers (both with 15%).

Table 1.1 also shows that the total working population of the Byron Shire is 10,830, accounting for 12% of the working population of the Northern Rivers region (88,729 workers). The highest proportion of employment within the Northern Rivers is located within Tweed (25%) and Lismore (21%). Despite the lower level of employment opportunities provided within Byron, there are still a proportionate number of jobs provided within the service industries, such as health care and social assistance, administrative and support services, and education and training. This therefore illustrates that whilst Byron industries of employment

are smaller in size in terms of the number of employees in each industry, the level of employment generated is sufficient to meet demand for such services based on population size.

The higher than average provision of employment within the Accommodation and Food Services and Retail Trade industries is directly related to the development of Byron Shire, with Byron Bay in particular, as a tourist destination. The economic profile of Byron shows that the Shire is heavily reliant on tourism. This reliance is strongly supported by the visual amenity of Byron Bay and the coast, and a warm climate year round.

1.3.3 Gross Regional Product

Table 1.2 provides an overview of the Gross Regional Product (GRP) of Byron Shire in the year ending June 2009.

Table 1.2
Byron Shire Gross Regional Product (Year to June 2009)

	Employed	GRP
Accommodation and Food Services	1,484	\$78,673,350
Administrative and Support Services	311	\$41,134,334
Agriculture, Forestry and Fishing	490	\$43,796,693
Arts and Recreation Services	204	\$19,557,300
Construction	869	\$114,158,651
Education and Training	804	\$56,207,763
Electricity, Gas, Water and Waste Services	72	\$20,057,306
Financial and Insurance Services	175	\$68,425,716
Health Care and Social Assistance	1,081	\$82,155,867
Information Media and Telecommunications	177	\$42,618,480
Manufacturing	929	\$117,706,188
Mining	13	\$8,326,395
Other Services	394	\$25,621,822
Professional, Scientific and Technical Services	643	\$80,742,578
Public Administration and Safety	392	\$39,837,698
Rental, Hiring and Real Estate Services	310	\$69,602,481
Retail Trade	1,598	\$81,336,911
Transport, Postal and Warehousing	282	\$41,630,534
Wholesale Trade	479	\$63,761,650
Total	10,707	\$1,095,351,719

Source: ABS State Accounts, RPS

Utilising the New South Wales state factor income by industry, and the currently level of employment provided by industry in Byron, the GRP for the Shire was approximately \$1.1 billion in the year ending June 2009.

As illustrated in Table 1.2, Manufacturing accounts for the highest proportion of the Byron Shire GRP (11%). The Construction industry accounts for the second highest proportion of the local economy with 10%, followed by Health Care and Social Assistance (8%). Arts and Recreation Services currently accounts for approximately 20% of GRP, which is in line with the level of employment it provides within the local economy (also 2%).

1.4 Tourist Overview

The tourism industry is a significant driver of the Byron Shire economy, with the Accommodation and Food Services and Retail Trade industries largely supported during the summer months by domestic visitors (both overnight visitors and day trippers) and by international visitors.

Tourism data is currently available for the Northern Rivers Region to the year ending June 2009, and for the Byron Shire LGA to the year ending June 2007. An overview of these tourism markets are provided below.

1.4.1 Northern Rivers Tourism Overview

The Northern River Region includes a number of established and emerging tourist hot spots along the coast, including Byron, Tweed, Cabarita Beach, Brunswick Heads, Kingscliff, and Casuarina.

Table 1.3 provides an overview of the total number of overnight visitors to the Northern Rivers, and how many nights they spent there, from 2005 to 2009.

Table 1.3
Domestic and International Overnight Visitors (2005-2009)

	Domestic		International		Total	
	Visitors	Nights	Visitors	Nights	Visitors	Nights
YE June 05	1,786,000	7,180,000	205,000	1,638,000	1,991,000	8,818,000
YE June 06	1,742,000	6,818,000	199,000	1,351,000	1,941,000	8,169,000
YE June 07	1,820,000	7,561,000	221,000	1,678,000	2,041,000	9,239,000
YE June 08	1,774,000	6,867,000	228,000	1,612,000	2,002,000	8,479,000
YE June 09	1,546,000	6,423,000	226,000	1,974,000	1,772,000	8,397,000

Source: TNSW

As illustrated in Table 1.3, there has been an overall decrease in the total number of visitors and visitor nights to the region. However, this is attributed to the decrease in the number of domestic visitors to the Northern Rivers, as the total number of international visitors to the region has increased over the five year period. Whilst decreases occurred in domestic visitation (13%) and domestic visitor nights (11%), international visitor levels increased by 10% and international visitor night increased by 21%.

In addition to overnight visitors to the region, there are domestic daytrip visitors that account for the highest proportion of visitors to Northern Rivers between 2005 and 2009, as outlined in Table 1.4.

Table 1.4
Domestic Daytrip Visitors (2005-2009)

	Domestic Visitors
YE June 05	2,603,000
YE June 06	2,923,000
YE June 07	2,593,000
YE June 08	2,926,000
YE June 09	3,151,000

Source: TNSW

With a total of 3.15 million domestic daytrip visitors to the Northern Rivers in the year ending 2009, the total number of visitors to the region was approximately 4.9 million. Domestic daytrip visitors accounted for 64% of total visitors.

The proportion of international and domestic overnight visitors and domestic daytrip visitors have a differing impact on the region in regards to expenditure during their visit and accommodation utilised during their trip.

Expenditure

- International overnight visitors spent \$120 million in the region. On average, they spent \$61 per night in the region. International overnight visitors spent an average of 8.7 nights in the region.
- Domestic overnight visitors spent \$831 million in the region. On average, they spent \$129 per night in the region. Domestic overnight visitors spent an average of 4.1 nights in the region.
- Domestic daytrip visitors spent \$343 million in the region. On average, they spent \$109 per trip in the region.

Accommodation

- The majority of international overnight visitors (32%) stayed in backpackers / hostel, 27% stayed at the home of friends or relatives, and 12% rented a house/apartment/unit/flat.
- The majority of domestic overnight visitors stayed at the home of friends or relatives (32%), 20% rented a house/apartment/unit/flat for their trip, and 19% stayed at a caravan park or commercial camping ground.

1.4.2 Byron Shire Tourism Overview

Byron Shire and Byron Bay in particular, is considered to be one of the most popular tourism destinations within the Northern Rivers. Byron Bay was ranked third in the top 10 beach and sun destinations in the world by Trip Advisor.¹ The area comprises a high provision of short stay accommodation, retail and food and beverage options for visitors.

Due to limited tourism data available at the Local Government Level, Byron Shire visitor data is only available to the year ending June 2007.

Table 1.5
Domestic and International Overnight Visitors (2005-2009)

	Domestic		International		Total	
	Visitors	Nights	Visitors	Nights	Visitors	Nights
Average to June 2007	484,000	1,912,000	169,000	1,070,000	653,000	2,982,000

Source: TNSW

As identified in Table 1.5, the number of domestic overnight visitors to Byron Shire was significantly higher than the number of international overnight visitors. However, the average number of visitor nights spent in the area by international visitors (6.3 nights) was higher than that of domestic visitors (3.9 nights).

As identified in Table 1.3, there were 1.82 million domestic visitors and 221,000 international visitors to the Northern Rivers in 2007. Therefore 76% of visitors to the Northern Rivers have also visited Byron Shire.

¹ <http://www.tripadvisor.com/TCDestinations>

Table 1.6 provides an overview of the accommodation used by domestic and international overnight visitors to Byron Shire.

Table 1.6
Accommodation used by Overnight Visitors (2007)

	Domestic		International*		Total	
	Visitors	Nights	Visitors	Nights	Visitors	Nights
Hotel/resort/motel or motor inn	119,000	385,000	24,000	72,000	143,000	457,000
Rented house, apartment, flat or unit	70,000	375,000	6,000	112,000	76,000	487,000
Caravan park or commercial camping	74,000	316,000	25,000	110,000	99,000	426,000
Friends or relatives	154,000	637,000	10,000	141,000	164,000	778,000
Backpackers	-	-	102,000	569,000	-	-
Other	45,000	137,000	5,000	66,000	50,000	203,000

Source: TRA

*Three year average to June 2007

The type of accommodation utilised by domestic and international overnight visitors differ significantly. Whereas the highest proportion of domestic visitors stayed with friends or relatives (33%) or at a hotel/resort/motel or motor inn (26%), international visitors were most likely to stay at backpacker accommodation (59%). Whilst 14% of international visitors stayed in a hotel/resort/motel/motor inn, this accommodation type only accounted for 7% of total international visitor nights. The high proportion of international visitor nights spent in backpacker accommodation, in correlation with a low proportion of usage of hotel/resort/motel or motor inn accommodation is an indication that these visitors are utilising more affordable accommodation options as they are staying for longer periods of time.

International visitors stay an average of 6.3 nights per visit, spending an average of \$384 (or \$61 per night). Domestic overnight visitors stay an average of 3.9 nights per visit, spending an average of \$614 (or \$156 per night).

Table 1.7 provides an overview of the top activities undertaken by domestic and international visitors to Byron Shire.

Table 1.7
Top Activities for Overnight Visitors*

	Domestic		International		Total
	Number	%	Number	%	
Go to the beach	352,000	73%	162,000	96%	514,000
Eat out	305,000	63%	149,000	88%	454,000
Pubs, clubs, discos, etc	206,000	43%	126,000	75%	332,000
Visiting friends and relatives	201,000	41%	-	-	201,000
Go shopping (pleasure)	184,000	38%	126,000	74%	310,000
Just walk or drive around	164,000	34%	-	-	164,000
Surfing	-	-	73,000	43%	73,000
Going to the markets	-	-	55,000	33%	55,000

Source: TRA

*Three year average to June 2007

Domestic and international visitors to Byron undertake similar activities during their visit, with the majority going to the beach and eating out. This is a clear reflection of the nature of the region which is strongly focused on the coast, with a high provision of food and beverage outlets to meet the needs of visitors. International visitors are more likely, however, to go to pubs, clubs or discos and go shopping. These activities are considered to be expenditure intensive, with more money being spent on nightlife and shopping than would be required on a day to the beach.

1.5 Implications

The Byron Shire supports a diversified range of employment opportunities; however this is currently largely reliant on the tourism industry as is evident by the high proportion of employees in the Accommodation and Food Services and Retail Trade industries. The high proportion of employment in the Retail and Accommodation and Food Services industries not only meets the food and beverage needs of the local population, but also meets the needs of overnight visitors and day-trippers to the area.

At current, the Cultural and Recreational Services industry sector in Byron Shire and Northern Rivers is essentially hobby and lifestyle based, with the majority of businesses generating no additional employment opportunities to their respective economies. However, it appears that the businesses are still successful at generating income. It is considered that at present there is a strong cultural and arts community, however there is potential for this cultural asset to be developed into a significant economic driver for the local and regional economies. In order for the Cultural and Recreational Services industry to build on the current cultural asset, increasing the commercial viability of the industry sector, sufficient investment is required.

Events and festivals in Byron, such as Splendour in the Grass in previous years and Bluesfest, have attracted a large number of visitors to the region. The previous location of these festivals at Belongil Fields, in close proximity to Byron Bay, had significant benefits to food and beverage outlets, retailers, and short stay accommodation retailers within Byron Bay. The approval and development of North Byron Parklands will significantly increase the capacity of the area to accommodate small, medium and large scale events and festivals and therefore the increase in attendees in the area will benefit the local and regional economies in particular, with on-flow effects to the wider state economy.

2 North Byron Parklands

2.1 Introduction

This section provides an overview of the North Byron Parklands, including details on the types of events to be held within the first five years of operation.

2.2 North Byron Parklands

The Byron Shire has historically hosted music festivals such as Splendour in the Grass and the Byron Bay Bluesfest. Both festivals were held at Belongil Fields in Byron Bay. Belongil Fields is undergoing a rezoning process for residential development, meaning that it is no longer a suitable venue for these festivals. As a result, Bluesfest has moved to Tyagarah Tea Tree Farm in Tyagarah, a site which is owned by its organisers, while Splendour in the Grass has temporarily relocated to Woodford in Queensland.

In order to provide a permanent venue for Splendour in the Grass in the Byron Shire, its organisers and other individuals formed the Billinudgel Property Trust in September 2006 and purchased a 256 Ha property with the intent to create a cultural arts and event space for the people of Byron Shire. This property has been called the North Byron Parklands and is located in the north east corner of Byron Shire in Yelgun, north of Byron Bay. The Parklands can be accessed from the Pacific Highway via Tweed Valley Way and Jones Road. Figure 2.1 illustrates the location of the North Byron Parklands and surrounding uses.

Figure 2.1 North Byron Parklands



2.3 Proposed Uses

The North Byron Parklands will be divided into four major zones. These include:

- Department of Environment, Climate Change and Water (DECC) extensions – Over 30 Ha of the site to be dedicated to the DECC, including land with Aboriginal heritage, habitat and wildlife corridors.
- Habitat Areas – Large areas of the site to be upgraded and maintained solely for habitat purposes.
- Managed Parklands – Some areas of the site to be planted out with less dense native plantings to function as habitat areas, as well as temporary other uses such as an event, camping or car parking.
- Non Habitat Areas – The majority of the site to be used for agricultural purposes for most of the year, and for events and conferences for limited times during the year.

Other uses proposed for the site include a conference centre, cultural centre and a mix of ecological restoration and agricultural uses.

2.4 Proposed Events

A number of events are proposed to occur in the North Byron Parklands in limited times per year. Such events could include festivals, music concerts, jamborees, gymkhanas, field days, art exhibitions, movies, and performances. The proposed events for the North Byron Parklands have been defined as follows:

- Minor Event – less than 300 patrons, with no daily limits.
- Small Event – 300 to 3,000 patrons, occurring over no more than 4 days per annum.
- Moderate Event – 3,000 to 10,000 patrons, with no more than 4 event days per annum.
- Major Event – more than 10,000 patrons, with no more than 12 event days per annum.

As the North Byron Parklands develop, so too will the number of events. The schedule of events for the first five years of operation is proposed as follows:

- Year 1 – 3 Major events.
- Year 2 – 2 Minor events, 1 Small event and 3 Major events.
- Year 3 – 2 Minor events, 2 Small events, 1 Moderate event and 3 Major events.
- Year 4 – 2 Minor events, 2 Small events, 1 Moderate event and 3 Major events.
- Year 5 – 2 Minor events, 2 Small events, 1 Moderate event and 3 Major events.

Some events are proposed to include ancillary camping, with a temporary camping site to be set up in current cleared grassed areas with associated infrastructure including access roads, water supply and wastewater services as well as amenities including toilet and shower facilities. A capacity for 17,500 campers can be accommodated on-site for large events in the first year, with the opportunity to grow this over time to 25,000 based on successful management.

2.5 Implications

The proposed North Byron Parklands will provide the opportunity for a permanent cultural base in Byron Shire in order to continue to attract events to the region. Its location in Yelgun surrounded by rural uses yet accessible to the Pacific Highway is considered to be appropriate to attract such events as it will not impact

on existing residential uses. In addition, the designation of much of the site for agricultural and habitat uses with designated space for events will mitigate any potential impact on the environment.

The establishment of a permanent cultural centre and event space provides the opportunity to build on Byron's existing reputation as a cultural destination. While Byron has an established cultural identity this reputation / brand largely appeals to a limited market attracted by the alternative lifestyle and culture provided in the area. Artists and festival goers know Byron as an established alternative cultural destination, with an existing cultural identity which has been generated by an active art and music scene which originated with Splendour in the Grass and Bluesfest. The North Byron Parklands will increase capacity for festivals of all scales and varieties, therefore providing an opportunity to increase the identity of Byron Shire as a cultural asset of regional, state, and national significance.

3 Economic and Employment Analysis

3.1 Introduction

This section will provide an analysis of the economic and employment benefits which will be created by the establishment of the North Byron Parklands. This will consider the full range of economic impacts to Byron Shire, the Northern Rivers Region and New South Wales including visitor expenditure, capital expenditure, income and employment.

3.2 Assumptions and Data Inputs

For the purpose of this study, economic impacts have been modelled for Byron Shire, the combined Northern Rivers Region, and New South Wales. The current economic environment of Byron Shire and the Northern Rivers is largely influenced by the existing strong tourism industry. This includes a strong employment base in those industries of accommodation, cafes and restaurants.

The North Byron Parklands will allow for a maximum of 12 days of Major events per year, with additional capacity for Minor, Small and Moderate events throughout the year, generating a range of direct and indirect economic impacts that will have benefits at the local, regional and state level. These benefits will largely be realised by the tourism industry within the local and regional area, however the development will also translate into broader regional benefits across several related industries and an overall increase to Gross Regional Product (GRP).

The analysis conducted has utilised regional input output modelling to determine the level of economic impact in regard to employment generation, level of investment, impact on GRP and impact to the tourism industry. These impacts have been estimated at a local (Byron Shire), regional (Northern Rivers) and State level where appropriate. The economic impacts to be measured will include impacts for the first five years of operation of the North Byron Parklands, as well as the potential 'long run' benefits related to the future prolonged operation of the facility.

The impacts to the economic environment have been analysed based on a number of assumptions and collected data inputs. These assumptions and inputs are outlined below.

Event Types

A number of events are proposed to occur in the North Byron Parklands. Such events by Event Category are considered to include, but not limited to, the following:

- Minor Events – local sports and recreation events such as tournaments / sports carnivals, jamborees, markets, as well as private functions.
- Small Events – local and regional sports and recreation events, such as performances, markets, and community events.
- Moderate Events – medium scale events appealing to a regional audience, such as festivals, concerts, exhibitions, and markets.
- Major Events – large scale events appealing to broader audience such as festivals, music concerts,

regional expos and exhibitions.

Attendance

RPS has utilised the information received from the project organisers to establish assumptions on project evolution and the likely capacity of the North Byron Parklands over the first five years of operation. Where available, RPS has utilised event numbers based on data provided for past events, otherwise the total capacity provided for the event category has been prorated depending on the total number of events anticipated to occur each year.

Tourist Expenses

Tourist expenditure has been derived for visitors that will stay within Byron Shire and the Northern Rivers region.

Accommodation costs are based on an online assessment of accommodation rates for a wide range of accommodation options (including hotels, motels, backpackers, holiday apartments, caravan parks, and camping sites). These costs have been averaged by accommodation option based on per person per night on annual basis (i.e. average for both high and low seasons).

The number of visitor nights that will be generated in Byron Shire include people camping onsite at North Byron Parklands. Based on a survey conducted in 2007 for attendees at the Splendour in the Grass festival, approximately 49% of attendees are anticipated to utilise the onsite camping facilities. While this will not be at capacity in the first year of operation, the number of people camping onsite is expected to reach capacity in the fifth year of operation.

Expenditure on meals and other expenses is derived utilising Tourism Research Australia data for overnight visitors and day-trippers to Byron LGA, and Tourism New South Wales data for overnight visitors and day-trippers to the Northern Rivers region. The average accommodation cost per person and the average expenditure per person at an event (derived from Bar Income from the Splendour in the Grass profit and loss statement) have been excluded from the tourist expenditure so that these figures are not double counted.

Byron Shire

- The total average visitor expenditure in Byron Shire is \$171 per person per day.
- The average expenditure on accommodation in Byron Shire per person per day is \$46 (though ranges between \$20 and \$94 depending on the specific accommodation type).[†]
- The average expenditure on meals and other expenses varies depending on other costs (i.e. accommodation) and event type though averages between \$90 and \$115 per person per day.
- Day-trippers will come to Byron Shire for Minor and Small Events, as well as to attend one day of a larger event, and are anticipated to spend approximately \$55 outside of the event.

Northern Rivers

- The total average visitor expenditure in Northern Rivers is \$129 per person per day.

[†] Please note that the financial modelling is based on the number of visitor nights for each specific accommodation type and the cost for each accommodation type.

- The average expenditure on accommodation in Northern Rivers per person per day is \$48 (though ranges between \$20 and \$110 depending on the specific accommodation type).[†]
- The average expenditure on meals and other expenses varies depending on other costs (i.e. accommodation) and event type though averages between \$45 and \$70 per person per day.

Expenditure

Direct expenditure is considered to be the expenses covered by North Byron Parklands for the construction, maintenance, and operation of the facility. This will include capital expenditure for the construction of facilities and infrastructure onsite (approximately \$7.3 million over the first three years) and site management costs (\$675,000 per annum). These figures have been supplied by North Byron Parklands.

Direct expenditure also includes the expenses covered by event organisers to ensure that the event is fully catered for. The expenses required for the establishment of an event are dependent on the event type and capacity, and assumptions on the expense requirements are based on expenditure figures received from previous Splendour in the Grass events.

Standard expenditure requirements for each event type are anticipated to include:

- Accommodation;
- Food and catering;
- Transport;
- Local Services; and
- First Aid and Health Services.

With the following anticipated expenditure requirement:

- Minor Event – expenditure requirement of approximately \$2,200
- Small Event – expenditure requirement of approximately \$5,500
- Moderate – expenditure requirement of approximately \$31,000
- Major Event – expenditure requirement of approximately \$82,000

These expenditure requirements are considered to be very conservative based on an assumed level of general requirements from the local area, based on rates of provision of expenses as identified by Splendour in the Grass. These expenses will be dependent on the specific scale and type of event and the operational requirements of these events. Expenses related to employment are not included in the above figures as employment has been assessed separately.

Indirect expenditure is considered to be the tourist expenditure on accommodation and food and beverage in the local and regional area. This expenditure is identified utilising the tourist expenditure assumptions as detailed above.

[†] Please note that the financial modelling is based on the number of visitor nights for each specific accommodation type and the cost for each accommodation type.

Event Income

There are two levels of income to be generated by the events held at the North Byron Parklands; income generated for the event organisers and income generated by stallholders/vendors at the event.

Event organisers will generate income from ticketing fees, stallholder fees, and other revenue streams (potentially including car parking, cloakroom, etc). Ticket prices have been based on an assessment of event capacity. Stallholder fees have been derived based on advertised rates for stalls at Splendour in the Grass 2010 provided by The Outpost².

- Minor event ticket price - \$5
- Small event ticket price - \$10
- Moderate event ticket price - \$50
- Major event ticket price - \$88
- Food and beverage stall fee - \$850 per day
- Art market stall fee - \$197 per day
- Merchandise and info stall fee - \$288 per day

Stallholders will generate income through merchandise and food and beverage sales. The potential expenditure on merchandise is based on an assessment of event type and capacity and the likely merchandise vendors and goods for sale. Food and beverage expenditure assumptions for smaller events are based on an assessment of event capacity and likely expenditure by attendees, whereas food and beverage expenditure at the Moderate and Major events is derived from analysis of the Splendour in the Grass 2009 Profit and Loss Statement.

- Attendees at Minor and Small events will spend approximately \$10 on merchandise
- Attendees at Moderate and Major events will spend approximately \$15 on merchandise
- Attendees at Minor events will spend approximately \$10 on food and beverage
- Attendees at Small events will spend approximately \$15 on food and beverage
- Attendees at Moderate and Major events will spend \$36 on food and beverage

Employment

Employment will be generated by the construction of the North Byron Parklands facility and required infrastructure, the ongoing maintenance, operation and management of the facility, and by the individual events (with the Moderate and Major events in particular).

The ongoing equivalent full time equivalent (EFT) positions for the facility have been provided by North Byron Parklands, comprising of the following:

- Parklands – 1.5 EFT

² <http://www.theoutpost.net.au/events/markets/2>

- Cultural Centre – 7 EFT
- Conference Centre – 12 EFT

The number of full time employees and contractors supported by Splendour in the Grass 2009, in comparison to the number of attendees, has been utilised to assume the level of employment which will be supported by the different event types. This included 7.6 EFT jobs for the event management and a further 19.4 EFT contractor jobs for an event hosting 17,500 attendees. These assumptions have been adjusted where necessary based on the likely scale and type of event.

Direct and indirect expenditure within Byron Shire and the Northern Rivers region will generate demand for additional employment opportunities, predominantly within the accommodation and food services and construction industries. The level of employment generated by this expenditure has been calculated utilising regional input-output modelling for the Byron Shire and Northern Rivers Region. This additional employment has been assessed in Section 3.7 below.

3.3 Tourism

The tourism industry is a major contributor to the Byron Shire and Northern Rivers Region economies, with visitation critical to the regions' economies. Due to the natural amenity of these areas and their proximity to the rapidly increasing South East Queensland, the regions are well placed in terms of tourism potential.

The establishment of a permanent cultural arts and event space at North Byron Parklands will result in an increase in the number of events in the Shire and subsequently an increase in tourism numbers to the area. In the first year of operation the events at North Byron Parklands are anticipated to attract approximately 68,500 people over 12 days. This is anticipated to increase to approximately 136,500 people over 20 days in the fifth year of operation.

Due to the North Byron Parklands' location proximate to South East Queensland, the Northern Rivers region and Byron Bay, an event at the Parklands can expect to attract both day trippers and overnight visitors. A Minor event would be more likely to attract day trippers while a Major event would be more likely to attract overnight visitors. Both types of visitors will provide positive economic impacts to the region through the increase in expenditure in the region.

The events at North Byron Parklands are estimated to generate the following number of day trippers and visitor nights to the Byron Shire:

Year	Day Trippers	Visitor Nights
Year 1	12,577	41,200
Year 2	15,705	41,404
Year 3	20,097	47,668
Year 4	21,435	52,051
Year 5	22,907	56,873

As the North Byron Parklands are located on the border of Byron Shire within the Northern Rivers Region, the events at North Byron Parklands are also expected to generate visitor nights for the Northern Rivers Region. These include:

Year	Visitor Nights
Year 1	29,615
Year 2	29,615
Year 3	33,953
Year 4	37,092
Year 5	40,545

The combined number of visitor nights in the Byron Shire and Northern Rivers generated by the events at the North Byron Parklands is therefore anticipated to increase from 70,815 in the first year of operation to 97,418 in the fifth year of operation. Many of these attendees will extend their stay in the region before and after the event. This will generate a direct positive impact for accommodation providers as well as food and beverage establishments within the local area and region.

The indirect impacts will be by way of the increased national promotion of the region as a result of the national marketing campaign and word of mouth from attendees which is likely to increase demand and visitation to the region throughout the year.

3.4 Expenditure

The development and maintenance of the North Byron Parklands and the organisation of events at the facility will generate direct expenditure into the local and regional economy. The establishment of a permanent cultural arts and events space at North Byron Parklands will attract event attendees to Byron and the greater Northern Rivers Region, therefore generating indirect expenditure on accommodation, food and beverage, and other uses within the area.

Direct Expenditure

Direct expenditure from the development and maintenance of the facility, followed by the utilisation of the facility for a range of events will be spent across the local and regional area, in particular, with some expenditure also being spent across the state of New South Wales and a proportion leaving New South Wales for Southeast Queensland.

The majority of the expenditure is, however, anticipated to remain within Byron Shire as identified:

	Capital Expenditure	Ongoing Site Management Costs	Event Expenditure
Year 1	\$2,182,600	\$648,000	\$101,780
Year 2	\$2,182,600	\$648,000	\$150,430
Year 3	\$735,000	\$648,000	\$170,530
Year 4	\$0	\$648,000	\$170,530
Year 5	\$0	\$648,000	\$170,530

Expenditure on goods and services is expected to extend throughout the Northern Rivers (excluding Byron Shire).

	Capital Expenditure	Ongoing Site Management Costs	Event Expenditure
Year 1	\$623,600	\$27,000	\$19,380
Year 2	\$623,600	\$27,000	\$28,630
Year 3	\$210,00	\$27,000	\$32,730
Year 4	\$0	\$27,000	\$32,730
Year 5	\$0	\$27,000	\$32,730

A small proportion of expenditure on goods and services is expected to extend elsewhere in New South Wales (excluding Byron Shire and Northern Rivers). It is anticipated that the majority of these expenses will be generated by Moderate and to a larger extent Major events at the North Byron Parklands, which will be requiring the resources available in Sydney to support large scale cultural and arts events onsite.

	Capital Expenditure	Ongoing Site Management Costs	Event Expenditure
Year 1	\$311,800	\$0	\$19,250
Year 2	\$311,800	\$0	\$28,400
Year 3	\$105,000	\$0	\$32,350
Year 4	\$0	\$0	\$32,350
Year 5	\$0	\$0	\$32,350

The total direct expenditure which will be generated as a result of the North Byron Parklands will be approximately \$3.6 million in the first year of operation. Following the completion of capital works on the development of the North Byron Parklands there will be a rapid reduction in expenditure, with ongoing site management costs and event expenditure being the remaining forms of event expenditure. Whilst RPS identifies that the total direct expenditure in the fifth year of operation will reduce to approximately \$1 million, this is considered to be a conservative estimate based on the lack of operational expenditure data which is currently available. Operational expenditure will be dependent on the types of events being held at North Byron Parklands, and therefore the requirement for construction of additional facilities, payment for artists, transportation, catering, equipment hire, and so on.

Indirect Expenditure

Indirect expenditure will be predominantly generated by the attendees travelling to the local and regional area for events. The level of indirect expenditure spent in other locations within New South Wales will be minimal, and cannot be calculated with sufficiently acceptable assumptions.

Whilst there is potential for New South Wales residents to travel by car to Byron for events at the North Byron Parklands, making stops along the way and therefore contributing to other local economies with expenses on accommodation and food and beverage, RPS does not have the data available to make any reliable assumptions. Therefore, RPS has taken a conservative approach and assumed that the impact of indirect expenditure elsewhere in New South Wales will be negligible. Tourist expenditure is also anticipated to occur within Queensland, due to the proximity of the Gold Coast to the site, and the ease of accessibility to the North Byron Parklands from the southern Gold Coast via the Pacific Highway. It is anticipated that a small proportion of event attendees may utilise accommodation in the Gold Coast, such as in Coolangatta, to ensure close proximity to Coolangatta Airport.

The total level of indirect expenditure generated as a result of the events at North Byron Parklands within Byron Shire will increase significantly between Year 1 and Year 5, as identified below. The indirect expenditure on meals and other expenses includes expenditure in Byron Shire by overnight and day tripper visitors.

	Accommodation	Meals and other expenses	Total
Year 1	\$1,788,990	\$4,197,773	\$5,986,763
Year 2	\$1,797,859	\$4,401,982	\$6,199,841
Year 3	\$2,069,853	\$5,104,893	\$7,174,746
Year 4	\$2,260,172	\$5,551,465	\$7,811,636
Year 5	\$2,469,250	\$6,042,693	\$8,511,943

The total level of indirect expenditure generated as a result of the events at North Byron Parklands within Northern Rivers (excluding Byron Shire) will increase significantly between Year 1 and Year 5, as identified below.

	Accommodation	Meals and other expenses	Total
Year 1	\$1,812,774	\$1,177,747	\$2,990,521
Year 2	\$1,819,425	\$1,129,273	\$2,948,698
Year 3	\$2,085,935	\$1,300,483	\$3,386,418
Year 4	\$2,278,783	\$1,425,775	\$3,704,558
Year 5	\$2,491,188	\$1,563,596	\$4,054,784

The total indirect expenditure that is anticipated to be generated by the North Byron Parklands is anticipated to increase from \$8,977,284 in the first year of operation to \$12,566,728 in the fifth year of operation within Byron Shire and the Northern Rivers region.

3.5 Employment

The establishment of a permanent cultural arts and event space at North Byron Parklands will generate an increase in employment opportunities. These employment opportunities will be supported by the maintenance and management of the facility, and employees and contractors required for the organisation of separate events that will use the North Byron Parklands (presumably on an annual basis).

The total anticipated level of direct employment generated as a result of the events at North Byron Parklands by year includes:

Year	Employees	Contractors
Year 1	41 EFT jobs	104 EFT jobs
Year 2	42 EFT jobs	108 EFT jobs
Year 3	50 EFT jobs	123 EFT jobs
Year 4	54 EFT jobs	139 EFT jobs
Year 5	59 EFT jobs	151 EFT jobs

The direct employment generated by the establishment of a permanent cultural arts and event space at North Byron Parklands will be distributed within Byron Shire and the Northern Rivers region.

During the events, indirect employment will also be generated in the accommodation, retail, food and beverage and construction (short term) industries. These employment benefits have been analysed using regional input output modelling and are indicated in Section 3.7 below.

3.6 Income

Income will be generated by the events held at the North Byron Parklands. This income will be distributed to event organisers as well as vendors at each event. The organisers of each of the events are anticipated to derive income through the sale of tickets, stallholder fees and other income streams such as car parking, coach and shuttle bus fees, sponsorship and advertising. The vendors at each of the events are anticipated to derive income through the sale of merchandise and food and beverages.

These potential income streams will generate a number of flow on benefits such as employment and increased industry output for those industries related to and supportive of the events that will be held at North Byron Parklands. These benefits have been quantified in the following sections of this report.

3.7 Regional Multiplier Effects

Regional input-output multipliers have been used to analyse the full extent of the range of anticipated economic benefits generated directly and indirectly from the proposed North Byron Parklands facility and the events that will occur at the facility. Input output multipliers provide an indication of the intra-industry flows within an economy resulting from an initial increase in industry output, however these multiplier effects should be treated as indicative only.

	Industry Output				Employment (EFT jobs)
	Direct			Indirect	Direct
	Event Income	Construction	Expenditure	Accommodation, Food and Other	Operational
Year 1	\$12,300,000	\$3,117,400	\$876,150	\$8,977,284	145
Year 2	\$20,000,000	\$3,117,400	\$882,460	\$9,148,538	150
Year 3	\$23,000,000	\$1,050,000	\$910,610	\$10,561,164	173
Year 4	\$25,000,000	\$0	\$910,610	\$11,516,194	193
Year 5	\$27,400,000	\$0	\$910,610	\$12,566,728	210

Source: RPS and provided data

The regional multipliers used for this assessment have been generated using National Accounts and national multipliers which have then been adjusted based on Byron Shire's economic base including industry capacity and activity as well as household expenditure by industry sector. The multipliers are therefore specific to Byron Shire however do include exports or benefits that will be realised outside of Byron Shire. The extent of benefits that will be contained within Byron Shire will be dependant on the scale of demand for each industry sector and the capacity for each industry sector.

Input output analysis provides the opportunity to analyse the intra industry flows in terms of output and employment resulting from an increase to output for a given industry. For the purpose of this assessment, input output analysis has been used to determine the *production induced effects*, *consumption induced effects* and *total multiplier effects* from the increased output (including income and expenditure) and employment generated as a result of North Byron Parklands and the associated events.

Those multiplier effects that have been used to analyse the extent of economic impacts are defined as follows:

- Initial Effect – This describes the initial effect or requirement for an extra dollar's worth of output of a given industry.
- Production Induced Effects – This describes the additional output required from all industries of the economy to produce the initial one dollar of extra output and all the subsequent induced output.
- Consumption Induced Effects – This describes the additional output that is generated from the wages and salaries of that employment generated as a result of the Initial and Production Induced Effects. As additional employment is generated, the spending of these additional employees will induce further production by all industries.
- Total Multiplier Effects – This describes the total of the Initial, Production Induced and Consumption Induced Effects and indicates the value of the total potential output/employment as a result of the initial increase in output (Initial Effect).

Those potential benefits that will be realised as a result of the multiplier effect within the economy have been calculated based on the known categories and values indicated below.

Those known direct and indirect economic benefits for industry output and employment indicated above are some of the Initial Effects related to the proposed North Byron Parklands facility. In addition to those Initial Effects indicated above there will also be a range of other employment generated as an Initial Effect related to those industry output values indicated. The full extent of those Initial Effects for North Byron Parklands is indicated in the table below.

	Industry Output				Employment (EFT jobs)			
	Direct			Indirect	Direct			Indirect
	Event Income	Construction	Expenditure	Accommodation, Food and Other	Operational	Construction	Expenditure Related	Accommodation, Food and Other
Year 1	\$12,300,000	\$3,117,400	\$876,150	\$8,977,284	145	8	5	63
Year 2	\$20,000,000	\$3,117,400	\$882,460	\$9,148,538	150	8	5	64
Year 3	\$23,000,000	\$1,050,000	\$910,610	\$10,561,164	173	3	5	74
Year 4	\$25,000,000	\$0	\$910,610	\$11,516,194	193	0	5	81
Year 5	\$27,400,000	\$0	\$910,610	\$12,566,728	210	0	5	88

Source: RPS and provided data

Based on the Initial Effects indicated above, the following table indicates the range of multiplier effects anticipated as a result of the development of the proposed North Byron Parklands facility and the hosting of those associated events.

	Industry Output				Employment (EFT jobs)			
	Initial Effects	Production Induced Effects	Consumption Induced Effects	Total Effects	Initial Effects	Production Induced Effects	Consumption Induced Effects	Total Effects
Year 1	\$25,270,834	\$34,866,734	\$60,137,568	\$120,275,136	221	228	380	829
Year 2	\$33,148,398	\$45,779,366	\$78,927,764	\$157,855,528	227	234	391	852
Year 3	\$35,521,774	\$48,447,838	\$83,969,612	\$167,939,224	255	252	427	934
Year 4	\$37,426,804	\$50,749,501	\$88,176,306	\$176,352,611	279	272	462	1,013
Year 5	\$40,877,338	\$55,429,457	\$96,306,794	\$192,613,589	303	295	503	1,101

Source: RPS and provided data

As indicated, there is potential for significant economic benefits to be realised through the economic multiplier effects relevant to the development and operation of the proposed North Byron Parklands facility and associated events. These multiplier effects indicate the additional industry output and employment that will potentially be generated as a result of the Initial Effects (including direct and indirect industry output and employment) generated by the facility and associated events.

The large majority of these additional benefits will be realised throughout the Byron Shire, Northern Rivers and New South Wales regions. The scale of these benefits that will be contained locally within Byron Shire will be dependant on the capacity of those industries that will support the facility and associated events. Based on the current capacity of those industries likely to support the North Byron Parklands facility and associated events, it is estimated that approximately 60% of the total multiplier effects will be contained locally within Byron Shire however it is expected that this will increase over time as industries expand due to the increase in local demand generated by the facility and the increased number and scale of events.

3.8 Implications

The establishment of a permanent cultural arts and event space at North Byron Parklands will generate considerable positive economic impacts for the Byron Shire and broader Northern Rivers Region. This will occur as a result of enhancing the region as a tourist and event destination, which will in turn increase the

number of day trippers and visitor nights in the region. This will subsequently provide a positive impact on employment and expenditure in the region.

The benefits that are anticipated to be derived from the establishment of the North Byron Parklands in the first and fifth year of operation are as follows:

- An estimated 12,577 day trippers in Year 1, increasing to 22,907 in Year 5.
- An estimated 70,815 visitor nights in Year 1, increasing to 97,418 in Year 5.
- An estimated \$3,601,764 in total expenditure on accommodation in Year 1, increasing to \$4,960,438 in Year 5.
- An estimated \$5,375,520 in total expenditure on meals and other items in Year 1, increasing to \$7,606,289 in Year 5.
- Direct employment (maintenance and management) to increase from an estimated 41 EFT employee jobs in Year 1 to 59 EFT employee jobs in Year 5.
- Direct employment (contractors) to increase from an estimated 104 EFT jobs in Year 1 to 151 EFT jobs in Year 5.

In addition to these Initial Effects indicated above, there will be a range of other economic benefits generated as a result of the economic multiplier effects within an economy. The development and operation of the proposed North Byron Parklands facility and associated events will support a significant increase in industry output and employment for a range of industries that will provide industrial support. It is estimated that up to 60% of these additional economic benefits will be contained within the Byron Shire economy based on current capacities however this proportion is likely to increase over time as businesses and industries increase in capacity in response to the demand generated by the North Byron Parklands facility and associated events.

4 Benefit Assessment

4.1 Introduction

This section provides an assessment and summary of the benefits associated with establishing a permanent cultural arts and event space at North Byron Parklands. These benefits will be realised throughout the Byron Shire, Northern Rivers Region and New South Wales economies.

4.2 Benefit Assessment

The enhancement of the Byron Shire and greater Northern Rivers Region as a tourist destination will provide economic benefits to this region. These benefits will directly increase expenditure and investment in the region, and will increase employment. The benefits associated with the North Byron Parklands are outlined in the table below.

	Benefit
	<p>During the first three years of operation, the capital expenditure for the construction of the North Byron Parklands will be distributed to the Byron Shire and Northern Rivers Region economies. A total of approximately \$7.3 million in capital expenditure is anticipated to be generated from the establishment of the North Byron Parklands. Due to North Byron Parklands' proximity to South East Queensland, it is considered that a proportion of this expenditure may also be distributed to this region, dependant on construction companies utilised by North Byron Parklands. Construction will occur over three years, generating employment for local and regional construction companies.</p>
Direct Expenditure	<p>Onsite management expenses are anticipated to be \$675,000 per year, with the majority being retained within the Byron Shire as it is expected that North Byron Parklands will utilise local contractors and labour to manage and maintain the facility.</p> <p>The different event types are expected to utilise a different mix of local, regional and state products and services. Small and Minor events are anticipated to predominately utilise local services and products. Moderate events are expected to utilise a mix of local, regional and state services and products dependent on the type of event being held, whereas Major events may utilise products and services from a variety of locations including other states due to the nature of the event. This will largely be dependent on future interest in the site from other existing or new establishing festivals.</p>
Indirect Expenditure	<p>The establishment of the North Byron Parklands will result in an increase in visitor numbers to the Byron Shire and Northern Rivers Region due to the significant increase in capacity for Byron Shire to accommodate Major Events. Based on previous attendance numbers, an assumption of 2 nights stay and available data sources, it is considered that Splendour in the Grass has historically resulted in approximately 32,000 visitor nights per festival (of which approximately 22,000 are considered to have stayed at commercial short stay accommodation).</p> <p>During the first year of operation North Byron Parklands is estimated to generate</p>

	<p>approximately 70,800 visitor nights throughout Byron Shire and the Northern Rivers region, increasing to approximately 97,400 in the fifth year of operation. The majority of visitor nights generated by the North Byron Parklands will be attributed to Major Events, such as Splendour in the Grass.</p> <p>The significant increase in visitor nights generated from the increased capacity will increase the total level of tourist expenditure captured within the Byron Shire and Northern Rivers Region. The total indirect expenditure that is anticipated to be generated by the North Byron Parklands is estimated to increase from \$8.98 million in the first year of operation to \$12.57 million in the fifth year of operation within Byron Shire and the Northern Rivers region.</p>
Direct Employment	<p>The establishment of the North Byron Parklands will generate additional employment opportunities for the management and maintenance of North Byron Parklands and event organisation. Employment for the management and maintenance of North Byron Parklands will be largely locally sourced, while employment generated from the events will be influenced by contractual agreements between North Byron Parklands and the event organisers. It is unknown whether contractors and part time employees responsible for the running of the events will be organised by North Byron Parklands management or commissioned by the event organisers themselves. EFT employment generated by events at the North Byron Parklands will increase as a result of the increased capacity for more events at this facility.</p> <p>The total number of EFT employees generated from the events at North Byron Parklands is estimated to increase from 145 EFT in the first year of operation to 210 EFT in the fifth year of operation.</p> <p>Other direct employment benefits have been estimated using input output analysis. This includes construction employment that will be generated over the first three years of operation with approximately 8 EFT jobs during the first two years and then approximately 3 EFT jobs for the third year.</p> <p>Employment related the expenditure of the North Byron Parklands organisation and event organisers will also generate direct employment which is estimated to generate 5 EFT jobs per annum.</p>
Indirect Employment	<p>The indirect employment generated as a result of the North Byron Parklands facility and associated events is related to the additional accommodation, food and other expenditure of event attendees. The value of this expenditure is estimated to generate approximately 63 EFT jobs in year one which is expected to increase to approximately 88 EFT jobs in year five as the number of events and attendees increases.</p>
Byron Shire Benefit	<p>The development of the North Byron Parklands is anticipated to have a nett benefit of approximately \$6.0 million to the Byron Shire economy in the first year of operation. This is anticipated to increase to a total benefit of approximately \$8.5 million during the fifth year of operation.</p> <p>Byron Shire has a strong arts and cultural community. However, the cultural strength of the local area is not contributing to the local economy as there are minimal employment opportunities and turnover generated by the businesses within the Cultural and Recreational Services sector. There is potential for this industry sector to become more commercially viable, provided that sufficient investment is provided to increase economic development opportunities.</p>

	<p>The establishment of a permanent cultural centre and event space provides the opportunity to build on Byron's existing reputation as a cultural destination. Artists and festival goers know Byron as an established alternative cultural destination, with an existing cultural identity which has been generated by an active art and music scene. The North Byron Parklands will increase capacity for festivals of all scales and varieties, therefore providing an opportunity to increase the identity of Byron Shire as a cultural asset of regional, state, and national significance. The national marketing campaign associated with Major events in particular will increase people's awareness of the Byron Shire as a destination that has a cultural identity that sets it apart from other beach destinations.</p>
Northern Rivers Benefit	<p>The development of the North Byron Parklands is anticipated to have a nett benefit of approximately \$9.0 million to the Northern Rivers regional economy in the first year of operation. This is anticipated to increase to a total benefit of approximately \$12.6 million during the fifth year of operation.</p> <p>The Northern Rivers Region will benefit as an extension of the increased awareness, visitation and investment in the Byron Shire.</p> <p>The Northern Rivers Region economy has historically been heavily reliant on the agricultural and rural sector, however with increasing property prices and demand for residential development in proximity to coastal areas, the reliance on agricultural output is reducing. Therefore economic diversification of the regional economy is required to replace economic output and employment historically provided by agriculture. Enhancing the tourism industry and cultural and recreational services is considered to be commercially viable and will ensure the continued economic development of the region.</p>
New South Wales Benefit	<p>The development of the North Byron Parklands is anticipated to have a nett benefit of approximately \$8.1 million to the New South Wales State economy in the first year of operation. This is anticipated to increase to a total benefit of approximately \$11.4 million during the fifth year of operation. The benefit to New South Wales is less than that for Byron Shire and the Northern Rivers Region as these regions will receive a net benefit from event attendees that reside elsewhere in New South Wales.</p>
Economic Multiplier Effects	<p>In addition to those direct and indirect economic benefits that will be generated from the North Byron Parklands facility and associated events, there will be a range of additional broader economic benefits as a result of the economic multiplier effect within an economy. The benefits indicated above are essentially the Initial Effects.</p> <p>From an Initial Effect of approximately \$25.3 million for industry output in year one, it is estimated that up to an additional \$95.0 million will be generated for the broad range of supportive industries to the North Byron Parklands. The Initial Effect is expected to be approximately \$40.9 million by year five which is estimated to generate up to an additional \$151.7 million in industry output for supportive industries.</p> <p>From an Initial Effect of approximately 182 EFT jobs generated in year one, it is estimated that up to an additional 496 EFT jobs will be generated throughout the broad range of supportive industries to the North Byron Parklands. The Initial Effect is expected to increase to approximately 303 EFT jobs by year five which is estimated to generate up to an additional 798 EFT jobs throughout supportive industries.</p> <p>The proportion of these benefits that will be contained in the local area (Byron Shire)</p>

	will be dependent on the capacity of businesses and industries within the area. At current it is estimated that up to 60% of the Total Effects will be contained locally however this is likely to increase over time.
Community Benefits	<p>The North Byron Parklands will provide additional benefits to the local and regional community through the provision of a facility that allows for increased social and recreational activities. Events held at the facility will provide the opportunity for families to spend time together. It will also provide the opportunity for local groups and organisations to establish activities to support local fundraising initiatives.</p> <p>The development of North Byron Parklands will also generate employment within the local and regional area, and to a lesser extent within the state.</p>

4.3 Conclusion

The proposed North Byron Parklands facility will generate substantial and significant economic benefits for Byron Shire, the Northern Rivers Region and New South Wales. The increase in capacity for events of various types and scales will support a significant increase in visitors to the region, therefore providing additional expenditure and employment. In addition to those direct economic benefits such as expenditure and employment, the North Byron Parklands will strengthen the region's existing cultural and tourism identity, further enhancing and diversifying the industry and economic base of the region.

Assumptions

This report has been prepared on the instructions of the stated party and is intended to address the issues as defined in the methodology. The data, analysis and findings contained in this report are, therefore, not appropriate for use in any other circumstance. The report contains a series of projections and forecasts, which have been prepared on the basis of the best available information. Due to the dynamic nature of many of these issues and the number of variables involved, RPS can give no guarantee that these projections and forecasts will be realised.

Documents issued electronically are susceptible to being altered. Therefore, only versions held and issued by PRS can be used as an acceptable reference or source of information.

Appendix A

Demographic Profile

Demographic Profile	Byron Shire		Northern Rivers		New South Wales	
Total Persons	28,766		267,474		6,549,178	
Age						
0 to 4	1,596	5.5%	14,885	5.6%	420,431	6.4%
5 to 14	3,993	13.9%	37,335	14.0%	878,483	13.4%
15 to 19	1,973	6.9%	18,338	6.9%	439,863	6.7%
20 to 24	1,350	4.7%	12,236	4.6%	431,854	6.6%
25 to 34	3,013	10.5%	24,992	9.3%	891,040	13.6%
35 to 44	4,357	15.1%	35,454	13.3%	957,842	14.6%
45 to 54	5,488	19.1%	41,536	15.5%	904,337	13.8%
55 to 64	3,518	12.2%	33,822	12.6%	719,551	11.0%
65 to 74	1,706	5.9%	24,572	9.2%	465,327	7.1%
75 to 84	1,328	4.6%	18,343	6.9%	328,795	5.0%
85 years and over	445	1.5%	5,961	2.2%	111,656	1.7%
Marital Status - Persons						
Married	9,068	39.1%	103,512	48.1%	2,628,074	50.1%
Separated	965	4.2%	7,931	3.7%	162,358	3.1%
Divorced	3,162	13.6%	22,711	10.6%	417,319	7.9%
Widowed	1,284	5.5%	16,206	7.5%	323,233	6.2%
Never Married	8,701	37.5%	64,902	30.2%	1,719,273	32.7%
Total	23,180	100.0%	215,262	100.0%	5,250,257	100.0%
Language Spoken at Home						
English Only	25,029	94.3%	247,276	97.0%	4,846,670	78.7%
Other	1,500	5.7%	7,730	3.0%	1,314,556	21.3%
Total	26,529	100.0%	255,006	100.0%	6,161,226	100.0%
Relationship in Household						
Husband or wife in registered marriage	7,945	30.9%	94,553	38.0%	2,394,428	39.7%
Partner in de facto marriage	2,571	10.0%	18,973	7.6%	364,903	6.1%
Lone parent	1,704	6.6%	13,541	5.4%	275,800	4.6%
Child under 15	4,967	19.3%	49,083	19.7%	1,215,947	20.2%
Dependent student (15-24)	1,166	4.5%	10,593	4.3%	303,887	5.0%
Non-dependent child	1,232	4.8%	12,878	5.2%	414,436	6.9%
Other related individual	393	1.5%	4,197	1.7%	136,365	2.3%
Unrelated individ living in family h/hold	376	1.5%	2,333	0.9%	50,002	0.8%
Group household member	1,589	6.2%	7,949	3.2%	180,733	3.0%
Lone person	2,936	11.4%	28,029	11.3%	571,653	9.5%
Visitor (from within Australia)	796	3.1%	6,451	2.6%	119,515	2.0%
Total	25,675	100.0%	248,580	100.0%	6,027,669	100.0%
Household Structure						
Couple with no children	2,593	36.0%	30,847	42.6%	618,583	36.0%
Couple family with children	2,819	39.1%	27,149	37.5%	792,686	46.2%
One parent family	1,707	23.7%	13,545	18.7%	275,798	16.1%
Other family	93	1.3%	903	1.2%	29,152	1.7%
Total	7,212	100.0%	72,444	100.0%	1,716,219	100.0%
Internet Connection						
None	3,178	29.7%	42,929	41.7%	817,252	35.1%
Broadband or Dial up	7,118	66.5%	56,235	54.7%	1,430,876	61.5%
Not Stated	415	3.9%	3,677	3.6%	80,088	3.4%
Total	10,711	100.0%	102,841	100.0%	2,328,216	100.0%

Demographic Profile	Byron Shire		Northern Rivers		New South Wales	
Dwelling Type						
Separate house	8,706	81.3%	78,934	76.8%	1,662,621	71.4%
Semi-detached and townhouse	781	7.3%	10,375	10.1%	226,552	9.7%
Flat, unit, apartment	746	7.0%	9,444	9.2%	411,793	17.7%
Other dwelling	473	4.4%	4,048	3.9%	25,703	1.1%
Not stated	5	0.0%	40	0.0%	1,548	0.1%
Total	10,711	100.0%	102,841	100.0%	2,328,217	100.0%
Persons per Household						
Separate house	2.56		2.62		2.84	
Semi-detached and townhouse	2.13		-		2.26	
Flat, unit, apartment	1.68		-		1.88	
Other dwelling: Total	1.55		1.65		1.80	
Not stated	-		-		-	
Total	2.42		2.43		2.60	
Dwelling Ownership						
Fully owned	3,854	36.0%	42,316	41.1%	810,706	34.8%
Being purchased directly	3,001	28.0%	28,242	27.5%	742,157	31.9%
Rented	3,353	31.3%	28,025	27.3%	687,430	29.5%
Other Tenure	78	0.7%	937	0.9%	19,259	0.8%
Not Stated	425	4.0%	3,319	3.2%	68,666	2.9%
Total	10,711	100.0%	102,839	100.0%	2,328,218	100.0%
Monthly Housing Loan Repayments						
Average Repayment - Sept 2006 \$	\$1,415		\$1,272		\$1,730	
Average Repayment - Current \$	\$1,581		\$1,422		\$1,889	
Weekly Rent						
Average Rent - Sept 2006 \$	\$249		\$194		\$233	
Average Rent - Current \$	\$278		\$216		\$254	
Employment						
Employed - Full-time	5,730	44.1%	57,828	51.3%	1,879,628	60.8%
Employed - Part-time	5,318	41.0%	38,556	34.2%	842,715	27.2%
Employed - Away From Work	797	6.1%	6,871	6.1%	187,104	6.1%
Employed - Total	11,846	91.2%	103,256	91.6%	2,909,448	94.1%
Unemployed	1,140	8.8%	9,461	8.4%	183,157	5.9%
Total labour force	12,985	100.0%	112,716	100.0%	3,092,604	100.0%
Not in the labour force	8,169		90,020		1,801,010	
Occupation						
Upper White	4,316	36.4%	30,852	29.9%	1,012,736	34.8%
Lower White	3,706	31.3%	35,162	34.0%	979,819	33.7%
Upper Blue	1,718	14.5%	15,242	14.8%	396,721	13.6%
Lower Blue	1,894	16.0%	20,365	19.7%	464,684	16.0%
Other	214	1.8%	1,653	1.6%	55,480	1.9%
Total	11,848	100.0%	103,274	100.0%	2,909,440	100.0%
Average Number of Cars	1.60		1.55		1.54	
Household Income						
Average Weekly - Sept 2006 \$	\$956		\$909		\$1,257	
Average Weekly - Current \$	\$1,068		\$1,016		\$1,373	
Household Income - Sep 2006 \$	\$49,824		\$47,409		\$65,541	
Household Income - Current \$	\$55,676		\$52,978		\$71,587	

Source: ABS, RPS

Current Dollars - March 2010

Appendix B

Business Profile

Table B.1
Business by Industry, by Size of Employment

Industry	Number of Employees per Business							Total Businesses
	Non employing	1-4	5-19	20-49	50-99	100- 199	200+	
Agriculture, Forestry and Fishing	279	69	27	12	0	0	0	387
Mining	0	0	3	0	0	0	0	3
Manufacturing	117	63	30	0	0	0	0	210
Electricity, Gas and Water Supply	3	0	0	0	0	0	0	3
Construction	351	141	27	3	0	0	0	522
Wholesale Trade	108	48	27	9	0	0	0	192
Retail Trade	180	162	87	6	6	0	0	441
Accommodation, Cafes and Restaurants	51	60	60	27	12	3	3	216
Transport and Storage	66	51	27	3	0	0	0	147
Communication Services	12	6	3	0	0	0	0	21
Finance and Insurance	69	18	6	0	0	0	0	93
Property and Business Services	567	159	45	9	0	0	0	780
Education	24	0	6	0	0	0	0	30
Health and Community Services	81	66	27	3	3	3	3	186
Cultural and Recreational Services	141	48	9	0	0	0	0	198
Personal and Other Services	60	30	15	0	0	0	0	105
Total	2,109	921	399	72	21	6	6	3,534

Source: ABS Count of Australian Businesses, 2007

Table B.2

Byron Shire Business Count by Industry, by Annual Turnover

	\$0- \$25,000	\$25,000- \$50,000	\$50,000- \$75,000	\$75,000- \$100,000	\$100,000- \$150,000	\$150,000- \$200,000	\$200,000- \$500,000	\$500,000- \$1M	\$1M- \$2M	\$2M- \$5M	\$5M- \$10M	\$10M- \$20M	\$20M- \$50M	\$50M- \$200M	\$200M +
Accommodation Cafes And Restaurants	15	15	3	9	18	21	66	33	12	15	6	3	0	0	0
Agriculture Forestry And Fishing	123	63	54	21	30	24	45	15	12	0	0	0	0	0	0
Communication Services	3	6	0	0	3	0	9	0	0	0	0	0	0	0	0
Construction	42	54	81	81	75	57	87	27	15	3	0	0	0	0	0
Cultural And Recreational Services	45	33	24	12	24	21	33	6	0	0	0	0	0	0	0
Education	3	6	3	3	3	3	6	0	3	0	0	0	0	0	0
Electricity Gas And Water Supply	0	0	0	3	0	0	0	0	0	0	0	0	0	0	0
Finance And Insurance	15	12	9	6	12	12	15	3	6	3	0	0	0	0	0
Health And Community Services	15	27	15	18	24	12	57	6	3	9	0	0	0	0	0
Manufacturing	33	42	27	18	6	9	48	21	6	0	0	0	0	0	0
Mining	0	0	0	0	0	0	0	0	3	0	0	0	0	0	0
Personal And Other Services	12	21	18	9	9	9	18	9	0	0	0	0	0	0	0
Property And Business Services	105	114	87	81	114	72	108	66	24	6	0	0	0	3	0
Retail Trade	39	24	30	39	42	42	111	60	24	27	0	3	0	0	0
Transport And Storage	21	24	15	6	24	15	30	3	9	0	0	0	0	0	0
Wholesale Trade	36	36	9	0	24	9	30	21	12	12	3	0	0	0	0
Total	507	477	375	306	408	306	663	270	129	75	9	6	0	3	0

Source: ABS Count of Businesses, RPS