

BYRON SHIRE EMPLOYMENT LANDS

BACKGROUND REPORT

JUNE



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CONSULTING

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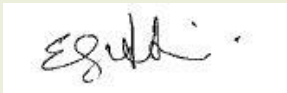
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Reviewer

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INTRODUCTION

1.0 INTRODUCTION

Positioning Byron LGA as an attractive place to invest means building on its competitive advantages. This document examines the opportunities for Byron Council to best manage its employment lands to attract investment and growth.

This Employment Lands Background Report (Background Report) presents research findings and projects future demand for employment land in Byron LGA. It provides a comprehensive evidence base that has informed the development of an Employment Land Strategy for Byron Local Government Area (LGA). The Employment Lands Strategy provides a comprehensive pathway for Council to attract and accommodate growth. The Strategy includes recommendations and actions to assist Council exercise strong leadership in planning and facilitating future growth in employment lands in the LGA.

1.1 Purpose

This Background Report:

- Identifies the drivers for economic growth and emerging industries
- Assesses the availability of employment lands
- Projects future demand for employment lands
- Assesses the adequacy of existing employment lands to accommodate future growth and change
- Identifies additional employment land supply needed in terms of employment type, timing and location
- Provides guiding principles to inform site suitability assessment and mapping of future employment lands.

The accompanying Employment Lands Strategy provides an action plan to:

- Deliver an employment land supply that will meet future demand
- Provide a planning framework that will be responsive to needs and market drivers
- To maximise the benefits of Council's economic development plans.

The Strategy will guide Council's decision making to ensure there is an adequate and appropriate supply of employment lands - to provide for sustainable growth into the future.

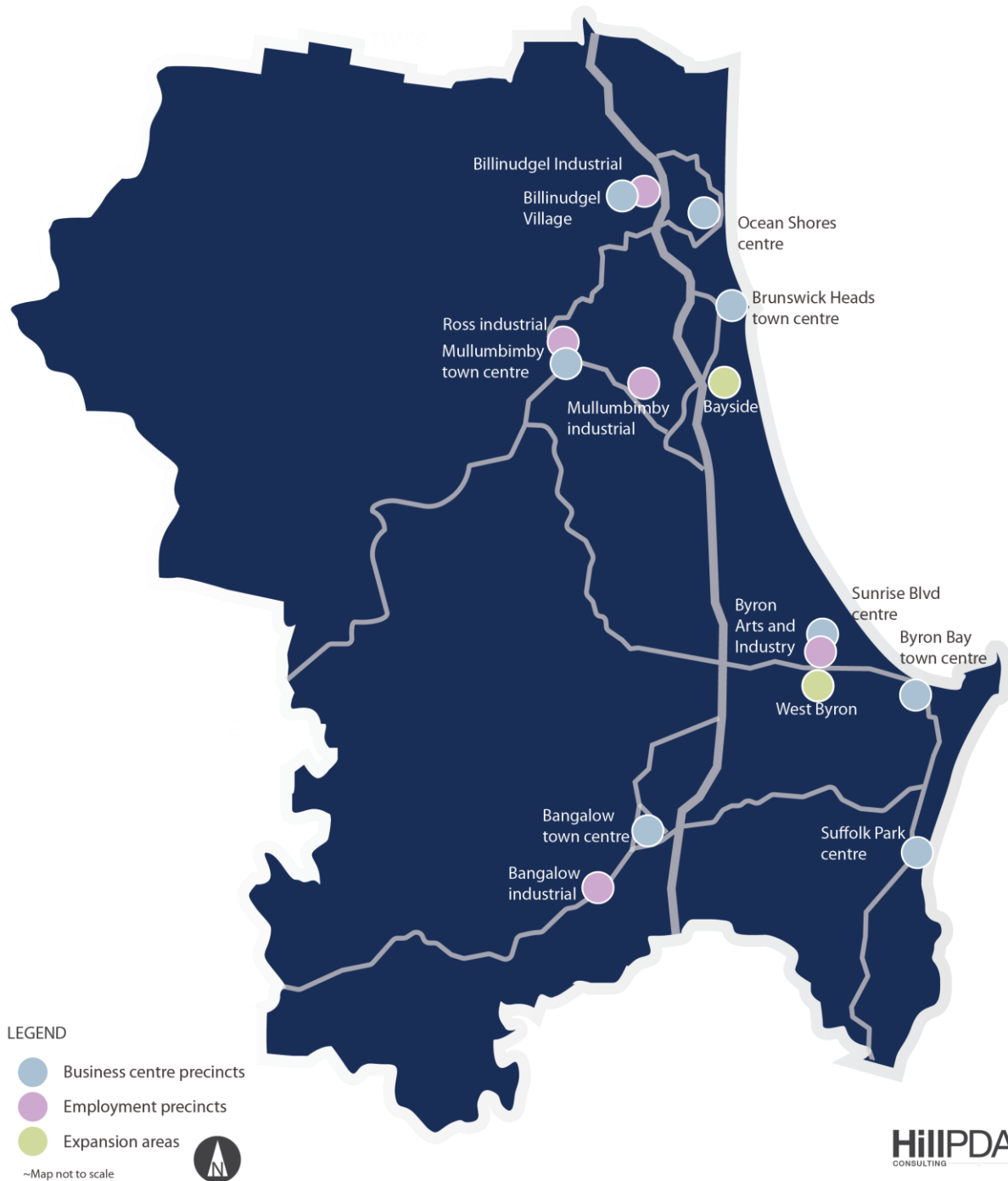
1.2 Employment land defined

Employment land in Byron LGA includes "land that is predominantly used for commercial or industrial activities resulting in employment". The Background Report and Employment Lands Strategy focuses on land designated for industrial, retail and commercial office uses under the Byron Local Environmental Plan 2014 (BLEP). Specifically, the Strategy applies to land in the following zones:

Business centre precincts	Employment precincts
B1 Neighbourhood Centre	IN1 General Industrial
B2 Local Centre	IN2 Light Industrial
B4 Mixed Use	B7 Business Park
RU5 - Village (only Billinudgel)	

Figure 1-1 identifies the location of Byron LGA's employment lands.

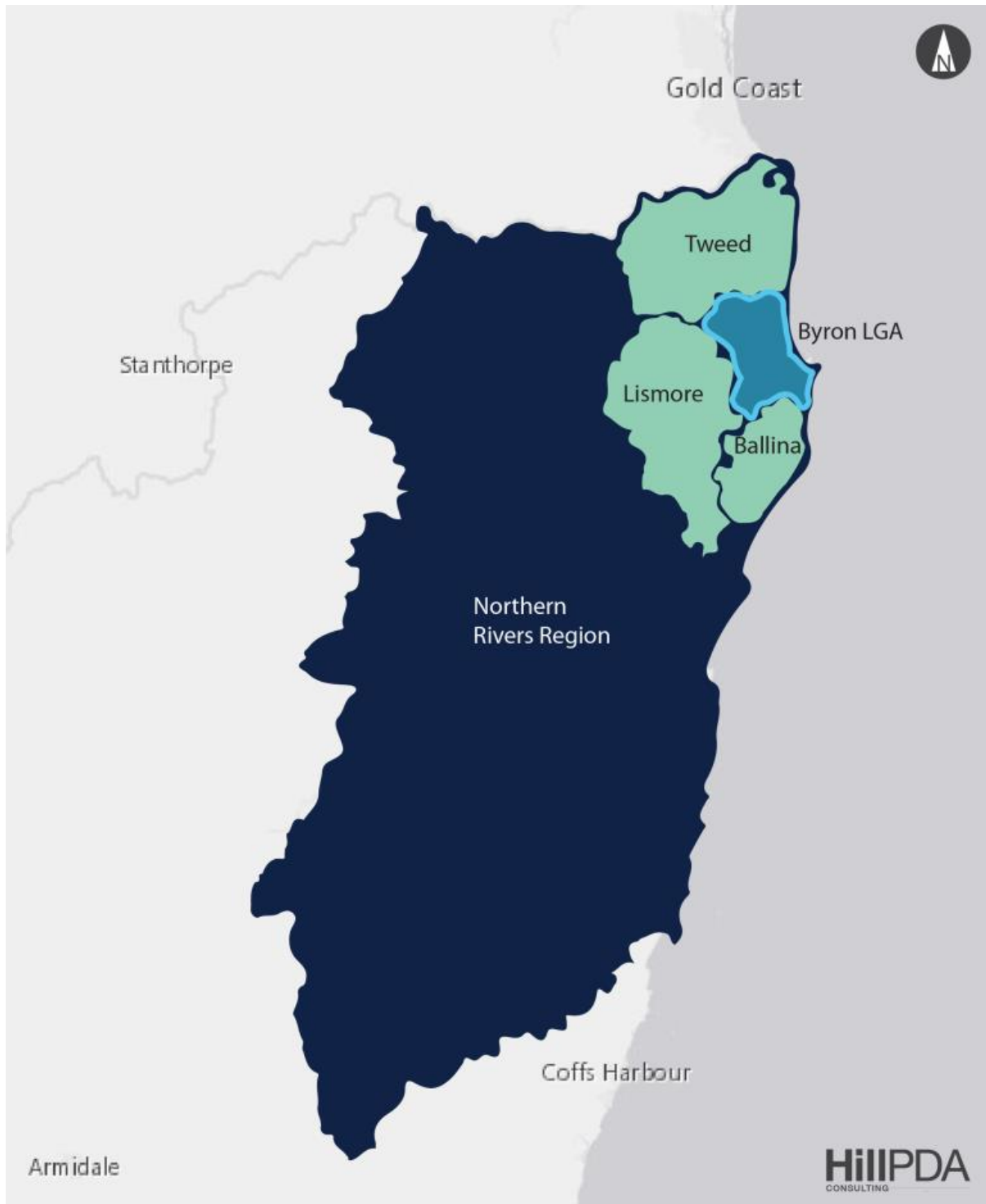
Figure 1-1: Byron LGA's Employment Lands



1.3 Study area context

The study area is the Byron LGA is located in Northern NSW, about 800km north of Sydney CBD and 200km south of Brisbane CBD. The LGA has an area of approximately 567 square kilometres and is bounded by the local government areas of Tweed, Lismore and Ballina. These local government areas, together with Kyogle, Richmond Valley and Clarence Valley LGA, make up the Northern Rivers District (see Figure 1-2). This district has been used as the benchmark when discussing the socio-economic profile (see Section 3).

Figure 1-2: Study area context



Source: HillPDA 2018

The LGA has a diversity of land uses including rural areas, national parks, residential, rural-residential, commercial and industrial.

The Byron LGA straddles the Pacific Motorway, which is the main arterial connection between Brisbane and Sydney. The Pacific Motorway is also the strategic connection between the major economic nodes along the east coast of Australia. Progressive upgrades to the Pacific Motorway and the planned future upgrade of the Gold Coast International Airport will improve connectivity to the LGA in the future.

Urban areas are concentrated along the coast at Byron Bay, Brunswick Heads, New Brighton, Ocean Shores, South Golden Beach and Suffolk Park. The largest town within the LGA is Byron Bay, which provides a range of retail, business and community uses to serve the LGA. Construction of the planned Byron Bay Town centre bypass, when completed, will reduce travel times, improve pedestrian safety and reduce traffic volumes in the town centre, particularly during the busy summer holiday period. Construction on the bypass is scheduled to commence in early 2018. Mullumbimby is the second largest town.

The Byron LGA supports a vibrant economy of service industries largely led by tourism.

The region is building its profile as a destination for musical events and other creative pursuits. Major festivals such as 'Bluesfest', 'Splendour in the Grass' and 'Falls Festival' have been successful in attracting significant visitors to the LGA. The North Byron Parkland offers a permanent fixture for major music and cultural events and is a major drawcard for tourists.

Rural and farming contributions are strong with fresh fruit, vegetables, meat, macadamias, honey, bread, bush foods, avocados, oils, muesli, beer, wine, sugar, tea, coffee and a range of unique food products, arising from create and innovative industries.

In recent years the LGA has attracted strong growth in small businesses in search of creative influences, lifestyle and the attraction of our villages and towns.

1.4 Methodology

The following tasks have been undertaken in the development of this Background Report:

- Engagement with Council, businesses, landowners and community groups to identify issues and future expectations
- Review of relevant National, State and local planning documentation
- Analysis of population and employment profiles within the Byron LGA using ABS Census data and Bureau of Transport data
- Analysis of macro and micro economic trends including emerging industries that may influence the future of employment lands in Byron LGA
- Audit of existing land uses across employment areas to identify the strengths and weaknesses of each area
- Projection of future employment growth to predict future floor space demand
- Examination of trends in retail demand and implications for future retail floor space demand
- Assessment of the future capacity of employment lands to accommodate projected growth
- Identification of rezoning opportunities to promote, facilitate and accommodate future employment growth within the LGA.

1.5 Report structure

This Background Report is structured into three parts as follows:

PART 1: STRATEGIC CONTEXT

Section 2 - Planning and policy context

- Provides a summary of the recent and relevant state and local policies that would influence employment land.

Section 3 – Population and employment profile

- Identifies the latest (2016) population and employment characteristics of the LGA.

Section 4 – Trends and drivers

- Explores broader trends and drivers that may influence the type and operation of employment land in the future.

PART 2: ASSESSMENT OF EMPLOYMENT LANDS

Section 5 – Precinct profiles

- The precinct profiles identify the economic, planning and employment characteristics of each precinct, including capturing floor space information and the SWOT analysis findings.

PART 3: GROWTH, DEMAND AND CAPACITY

Section 6 – Growth, demand and capacity

- Builds on the information provided in Section 3 and 4 to forecast growth and change in Byron LGA over three time periods (2021, 2026 and 2036). The section seeks to identify demand for employment related floorspace in order to identify the needs for land, appropriate zones and development controls.
- Explores the spatial opportunity for rezoning further employment land including opportunities as constraints of each scenario.

Section 7 – Site suitability principles

- Identifies locational and environmental factors that are necessary to support successful employment lands.

Section 8 – Key observations

- Outlines how the findings of this Background Report will be translated into strategies and directions for the LGA. The recommendations will be communicated as guiding principles with strategies around zoning and development controls.

PART 1

STRATEGIC CONTEXT

2.0 PLANNING AND POLICY CONTEXT

This section outlines the existing planning and policy context at a national, state and local level, relevant to the growth and direction for employment land within Byron LGA.

2.1 National and interstate policy context

2.1.1 Regions 2030 – Unlocking opportunity

In 2017, the Commonwealth of Australia released Regions 2030 to provide a coordinated approach across five key areas: jobs and economic development; infrastructure, health, education and communication. The document outlines the Australian Government's investments, achievements and future directions for regional Australia.

Initiatives that may assist businesses and development within Byron LGA include:

- Lower taxes through the Enterprise Tax Plan – in 2015-2016 the Government cut the business tax rate to 28.5 per cent for businesses with an annual turnover of up to \$2 million. The Government's Enterprise Tax Plan will reduce the business tax rate for companies with a turnover of less than \$50 million to 25 per cent by 2026-27.
- Our Plan for Manufacturing in Regional Australia – includes initiatives to grow Australia's manufacturing in the regions and assist start-ups to be competitive by building the capability of the Incubator Support element of the Entrepreneurs' Programme. This initiative may be available to some businesses in the Byron LGA and may increase demand for land in industrial estates.

2.1.2 South East Queensland Regional Plan (SEQRP) 2017

The South East Queensland Regional Plan, known as ShapingSEQ, was released in 2017. ShapingSEQ is a statutory regional plan that provides a framework to manage growth, land use and development in South East Queensland. ShapingSEQ acknowledges connections with northern New South Wales as identified in Figure 2-1.

The Plan recognises Northern NSW as a key coastal and inland interstate connection that facilitates a strong tourism network with South East Queensland. It also recognises the importance of agricultural production in the North Coast to markets in South East Queensland. Access to the South East Queensland markets via M1 Pacific Motorway connection is particularly important for economic development in North Coast and Byron LGA. The plan recognises opportunities for businesses to leverage off planned enhancements to North Coast infrastructure networks, including improvements to the M1 Pacific Motorway.

Figure 2-1: ShapingSEQ regional relationships



Source: Qld Government, ShapingSEQ, 2018

2.2 State policy context

2.2.1 North Coast Regional Plan (2017)

The North Coast Regional Plan states the NSW Government's land use planning priorities to 2036. The plan applies in the 12 local government areas extending from the Port Macquarie in the south to the Queensland border in the north. It predicts that the region's population will increase by 76,200 persons between 2016 and 2036.

The Plan acknowledges that Byron LGA has a strong economy based in tourism, creative arts, agricultural, food manufacturing and health sectors. It predicts that improvements to road, air and telecommunications infrastructure will support future economic growth and opportunities in the LGA. In particular, the plan seeks to maximise opportunities associated with the growth of South East Queensland. It also foreshadows investigations into opportunities for additional employment land at West Byron Bay.

A number of directions and actions in the Plan are relevant to Byron LGA employment lands. These are outlined in Table 2-1.

Table 2-1: Relevant Actions in the North Coast Regional Plan

Directions and Actions	Implications for Byron LGA
Direction 6: Develop successful centres of employment Actions 6.1-6.7	Growth in knowledge intensive industries and small businesses due to roll-out of National Broadband Network Potential to leverage the concentration of creative professionals in the fields of visual arts, design, literature, publishing, screen and digital content in Byron. An increasing emergence of creative hubs and clustering of creative business communities will need to be managed so not to “push-out” traditional industrial uses in the industrial estates. New commercial precincts outside of centres Additional commercial precincts are not to be encouraged. Proposals for new commercial precincts located outside existing centres are appropriate only if they respond to retail supply and demand, accommodate innovations in the retail sector, maximise the use of existing infrastructure and enhance the value of the public realm. Local Growth Management Strategies Local Growth Management Strategies will inform employment supply in locations that are supported by freight access and protected from encroachment by incompatible development. Certain industries to be located away from existing centres due to their type, scale and nature, will be identified in the strategies. Unique local qualities and competitive advantages The identity and focus for each local centre needs to be established and reiterated by: - Facilitating economic activity around industry anchors such as health facilities (e.g. Byron Centre Hospital) and by introducing planning controls that encourage clusters of related activity - Promoting knowledge industries by applying flexible planning controls, providing business park development opportunities and identifying opportunities for start-up industries - Reinforcing centres through local growth management strategies and local environmental plans as primary mixed-use locations for commerce, housing, tourism, social activity and regional services - Focusing retail and commercial activities in existing centres and develop place-making focused planning strategies for centres - Promoting and enabling an appropriate mix of land uses and preventing the encroachment of sensitive uses on employment land through local planning controls - Delivering an adequate supply of employment land through local growth management strategies and local environmental plans to support jobs growth - Ensuring employment land delivery is maintained through an annual North Coast Housing and Land Monitor
	The Plan identifies Byron Bay as a prime tourism development area, with conference and function centres, access to public transport and large-scale accommodation venues. It encourages: - Actions to capitalise and build on the region’s reputation as a host of major sporting events and cultural festivals - Large-scale tourism developments in prime tourism development areas - Tourism and visitor accommodation and supporting land uses in coastal and rural hinterland locations being promoted through local growth management strategies and local environmental plans - Medium to smaller-scale nature-based and coastal tourism accommodation outside prime tourism areas. - Event, dining and accommodation options in rural areas should only be considered where they complement and are consistent with prime agricultural pursuits. - Eco-tourism and nature-based tourism should only be located where a long-term, beneficial and sustainable relationship with the environment can be established.

Directions and Actions	Implications for Byron LGA
Direction 9 – Strengthen Regionally Significant Transport Corridors	The upgrade of the Motorway has created opportunities for new and expanded freight facilities and distribution centres. Improved regional roads are increasing the efficiency of the freight network across the North Coast, which is contributing to job and business growth.
Direction 14: Provide great places to live and work	Precinct planning in key centres will promote jobs through the management of employment lands and employment uses.

2.2.2 Regional Development Framework

The NSW Department of Industries Regional Development Framework provides a model of investment in regional NSW that seeks to:

- Provide quality services and infrastructure in regional NSW
- Align efforts to support growing regional centres, acknowledging the needs of areas with strong growth in population, jobs or both
- Identifies and activates economic potential by looking across regional NSW for opportunities to change the economic outlook and activate local economies.

The Framework cites Byron as a growing regional centre, appropriate for future investment in infrastructure.

2.2.3 Economic Development Strategy for Regional NSW

Regional Development Australia has developed an Economic Development Strategy for regional NSW that seeks to boost the regional economy by:

- Enabling competition and building capability in the economy
- Fostering strategic engagement and partnerships with industry
- Investing in infrastructure and other drivers of productivity growth
- Implementing innovative and fiscally responsible economic policy.

The strategy identified growth in retirees population to the Byron LGA as a key driver of increased demand for health and aged care. This suggests opportunities to leverage the new health precinct on Ewingsdale Road to expand and cluster supporting health and aged services around the hospital.

2.2.4 Employment Land Submarket Analysis for the North Coast (MacroPlan)

MacroPlan was appointed by the Department of Planning and Environment to undertake an employment land assessment for the North Coast Region. The assessment concluded, based on population and employment projections (from 2011), that:

- More employment land may be required to accommodate commercial and retail demand post 2031
- Some demand for commercial and retail floorspace could be accommodated at the West Byron Urban Release Area, which includes some B1 Neighbourhood Centre and B4 Mixed Use land in its master plan (this has occurred)

- Rezoning of sites at the periphery of existing commercial cores, towns and centres (i.e. local and neighbourhood) may represent another practical approach to delivering more ‘business’ land in Byron LGA
- Byron LGA does not provide a comprehensive retail hierarchy, of the likes of the surrounding LGAs of Ballina and Tweed. For example, land that can accommodate bulky goods retail and major supermarkets.

Detailed outcomes of this document have been considered during the preparation of this Employment Land Strategy.

2.3 Local policy context

2.3.1 Enterprising Byron 2025

Enterprising Byron 2025 is the Byron Council’s Economic Development Strategy. It aims to accelerate employment generation and work creation; create resilient communities and build community capacity; and retain and attract industry and private/public investment.

The strategy includes an analysis of Byron LGA’s economic strengths and challenges. It also provides Strategic Direction to foster growth in local businesses. It identifies a number of strategic economic drivers that have influence on the directions for the employment land strategy, these include:

- Visitor economy – higher yield, low impact
 - Investigate the function and facilitation of retail and entertainment uses that support tourism
 - Investigate influence tourism has on other employment uses (i.e. rents and land values)
 - Space requirements for conference facilities, accommodation etc.
- Food economy – agricultural and value added manufacturing
 - Investigate land requirements for food processing and manufacturing where relevant to employment precincts
 - Consider the balance between protecting strategic agricultural land and facilitating employment land
- Creative sector and knowledge industries – innovation drivers
 - Consider land use requirements to facilitate and support creative sector and knowledge industries
 - Consider the appropriate location and services required to support and encourage this sector
- Business services and trades – local competitiveness enablers
 - Consider infrastructure upgrades required to attract and retain business services and trade
 - Investigate if current land provision is suitable in meeting the needs of this sector
 - Growing online economy – increasing creative industries and remote workspaces
 - Promote an attractive investment environment
- Property and construction – sustainable development
 - Support employment uses by ensuring sufficient land is available for development
- Environmental industries – renewable energy and circular economy
 - Determine the number of businesses incorporating sustainability elements, with a goal to encourage net zero emission and opportunities for renewables and recycling.

- Non-food related agriculture – hemp, bamboo, nurseries
 - Protecting rural agricultural land from undue encroachment and investigating processing/manufacturing space to support this expanding industry.

2.3.2 Byron Bay Town Centre Master Plan

The Byron Bay Town Centre Master Plan includes an economic development strategy that aims to diversify the town centre and increase opportunities for mixed use developments. The strategy was informed by extensive community consultation. It aims to:

- Activate and increase local business opportunities in the Laneways
- Achieve diversity in commercial floor space size and encourage/support local businesses.

The Master Plan identified a number of key sites and opportunities for consideration in the future including Caravan Park Site, western side of the Rail line, Lawson Street Car Park, Butler Street Reserve, Sandhills Estate.

The Byron Bay Town Centre master plan is informing a review of planning controls in the Byron Town Centre.

2.3.3 Byron Local Environmental Plan 2014

Byron Local Environmental Plan 2014 sets out the planning framework for employment and other lands in Byron LGA. The planning controls for each zone relevant to employment lands is summarised in Table 2-2. In general, the LEP provides for a comprehensive range of employment uses. Development standards for employment lands vary according the locational attributes.

Table 2-2: Byron LEP controls and observations

Byron LGA	Relevant Zone Objectives [Uses in separate table]	Other Relevant Planning Controls	Function and Observations	Commentary
Zone B1 Neighbourhood Centre	SILEP To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood.	- Sunrise Boulevard - Suffolk Park - Bayside FSR of 0.5:1, height of 9m	Function - Site specific retail purpose Observations - Specifically to accommodate small groups of shops in residential areas. - While most serve residential areas, one site is co-located with other employment zones, housing a small retail plaza in West Byron.	Floor space ratio controls are a considerable constraint on redevelopment on lands zoned B1.
Zone B2 Local Centre	SILEP - To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. - To encourage employment opportunities in accessible locations. - To maximise public transport patronage and encourage walking and cycling. Added by Council: To encourage vibrant centres by allowing residential and tourist and visitor accommodation above commercial premises.	- Byron Bay –FSR of 1.3:1 and height of 9m-11.5m - Mullumbimby – FSR of 0.8:1 and height of 9m - Brunswick Heads – FSR of 0.8:1, height of 9m - Bangalow – FSR of 1:1, Height, 9m - Ocean Shores – FSR of 0.8:1, height of 9m - Some towns –e.g. Bangalow have extensive heritage conservation areas/heritage items which limits scope for redevelopment.	Function - Town centre Observations - Lands that comprise the main core of town centres such as Byron Bay, Bangalow, Mullumbimby - These precincts tend to be primarily retail and residential uses. - Sometimes the standalone employment zone, at other times, co-located with other employment zones around the periphery of the B2 core.	- FSRs relatively low. FSR in the B2 zone is usually around 2:1 in neighbouring Tweed LGA. - Permissible uses and location of lands zoned B2 aligns with zone objectives. - Evidence of where lands zoned B2 are not being actively redeveloped. Single dwelling houses are common here.
Zone B4 Mixed Use	SILEP - To provide a mixture of compatible land uses. - To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.	- Byron - FSR of 0.6:1 and height of 9-11.5m. - Brunswick Heads – FSR of 0.5:1, height of 9m - Sunrise Boulevard – FSR of 0.9:1 and height of 9m	Function - Specific purpose case-by-case Observations - Applied to specific locations – rather than being applied to an entire centre (i.e. not the same application as B2) - Light industrial and warehousing allowed which is unusual for a B4 zone. - One location (Brunswick Heads) is highly underdeveloped. It is residential with vacant sites.	- FSR is unusually low for a B4 zone, at a level that does not facilitate mixed use redevelopment. - The use of the zone is obscure, usually applied to the core of main centres in a non-metropolitan context, instead it is used on a site-by-site basis, at the periphery of centres or co-located with other employment zones. - Does not align with zone objectives

Zone B7 Business Park	SILEP - To provide a range of office and light industrial uses. - To encourage employment opportunities. - To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area. Added by Council: Enable a range of other development compatible with or ancillary to industrial uses if such uses do not undermine the retail function of Byron Bay town centre.	West Byron – FSR of 0.9 – height 9m	Function - Mixed employment area. Does not have a distinctive retail or industrial character. Observations - B7 is located alongside IN2 and B1 zones close to Byron Bay Township. - Retail outlets are directly associated with the manufacture of the product within the estate itself. - Markets are prohibited in this zone - Shops greater than 200sqm are prohibited - Examples of businesses identified as operating in the B7 zone include Mr Vintage, Eastgate Christian Community Church, Byron Gourmet Pies, Byron Hire, Underwater Australasia (Diving Gear), The Work Pod (Coworking Space), Mon Manabu (Gift Shop), ECO Minerals, Nemidon Gels, Satya James Boutique (Clothing), Reece Plumbing, Liberated Heart (Clothing) and Stevie May (Clothing), Byron Bay Tile Merchants.	- Zone has a unique character. Does not resemble an industrial area, nor does it resemble an out-of-centre retail precinct or a ‘business park’ typology. - While bulky goods premises and shops up to a certain size are permitted, larger shops are not. It is unclear what would happen to the zone if the retail cap was lifted. - Currently operates in accordance with zone objectives.
Zone IN1 General Industrial	SILEP - To provide a wide range of industrial and warehouse land uses. - To encourage employment opportunities. - To minimise any adverse effect of industry on other land uses. - To support and protect industrial land for industrial uses. - To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.	- Billinudgel – FSR of 0.4-0.75, Height – 9m - Mullumbimby – FSR of 0.75:1, height 9m - Bangalow– FSR of 0.75:1, height 9m	Function - Light industry Observations - Cluster located in Bangalow. Most of the food retail is manufactured on site and sold. They appear to sell online. - Markets are prohibited in this zone - Health services facilities are prohibited - Shops greater than 200sqm are prohibited - Evidence of storage, warehousing, shops, recreation/fitness, vehicle sale and service. - Examples of businesses identified as operating in the IN1 zone include (outer Byron left) Hemp Foods Australia (Food Products Supplier), Bacroo Agribusiness (Livestock Breeder) Eden Country Store (Fence Supply Store), Bangalow Shoemaking, Gungalow Smash Repairs. - Examples of businesses identified as operating in the IN1 zone include B-Line Auto (Auto Parts Store), Ray Towers Carpets, The Branches Coffee Roasters, Mullumbimby Bus Service and Transform Fitness/Transform Martial Arts.	- Appears to be operating in line with the objectives of the zone. - These precincts are traditional industrial precincts, unlike the West Byron IN2 zone.

Zone IN2 Light Industrial	SILEP - To provide a wide range of light industrial, warehouse and related land uses. - To encourage employment opportunities and to support the viability of centres. - To minimise any adverse effect of industry on other land uses. - To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area. - To support and protect industrial land for industrial uses. Added by Council Provide for creative industrial uses such as artisan and cultural industries.	West Byron IN2 is an FSR of 0.9:1 and a height of 9m.	Function - Light industry. Observations - Cluster located adjacent to B7 in West Byron. Most of the retail here is ancillary to the actual manufacture of the product. - Shops greater than 200sqm are prohibited - Health services facilities are prohibited - Evidence of community, vehicle sale and service, home/outdoor improvement, recreation/fitness, food manufacturer, hobby retail (often associated with manufacturing), café and restaurant, supermarket, furniture retail (associated with onsite manufacturing), personal services, storage. - Examples of businesses identified as operating in the IN2 zone include Bunnings Byron Bay, The Salvation Army, Baba Slings, Mctavish Surfboards, Love Mae (Gift Shop), Sole Bros (Shoe Store), and The Academy Martial Arts.	- Aligned with objectives of the zone, particularly the unique objective added by Council. - Byron Arts – has evolved away from a traditional industrial precincts concept due to its ad-hoc evolution.
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2.4 Implications

The current policy context is one that:

- At the national and local level, is supportive of small business and industry growth
- Recognises the benefits of proximity to infrastructure and markets in South East Queensland
- Seeks to build on the strengths of existing infrastructure and growth industries
- Recognises the need for a planning framework that can capture investment opportunities
- Planning controls in some employment precincts may be constraining development. Including B1 and B4 zones.

3.0 POPULATION AND EMPLOYMENT PROFILE

This section provides a profile of the LGA's resident population and labour force. The Northern Rivers Region¹ has been applied as a benchmark to identify specific characteristics and trends that have influenced Byron's labour force and that are relevant to employment demand. The composition and strength of a region's economic profile is likely to influence future employment levels and subsequent demand for employment floor space. The two geographical areas are provided in Figure 3-1 below.

Figure 3-1: Socio-demographic geographical boundaries



Source: HillPDA 2018

¹ This area comprises the LGAs of Ballina, Byron, Clarence Valley, Tweed, Lismore, Kyogle and Richmond Valley

3.1 Resident population profile

3.1.1 Population growth

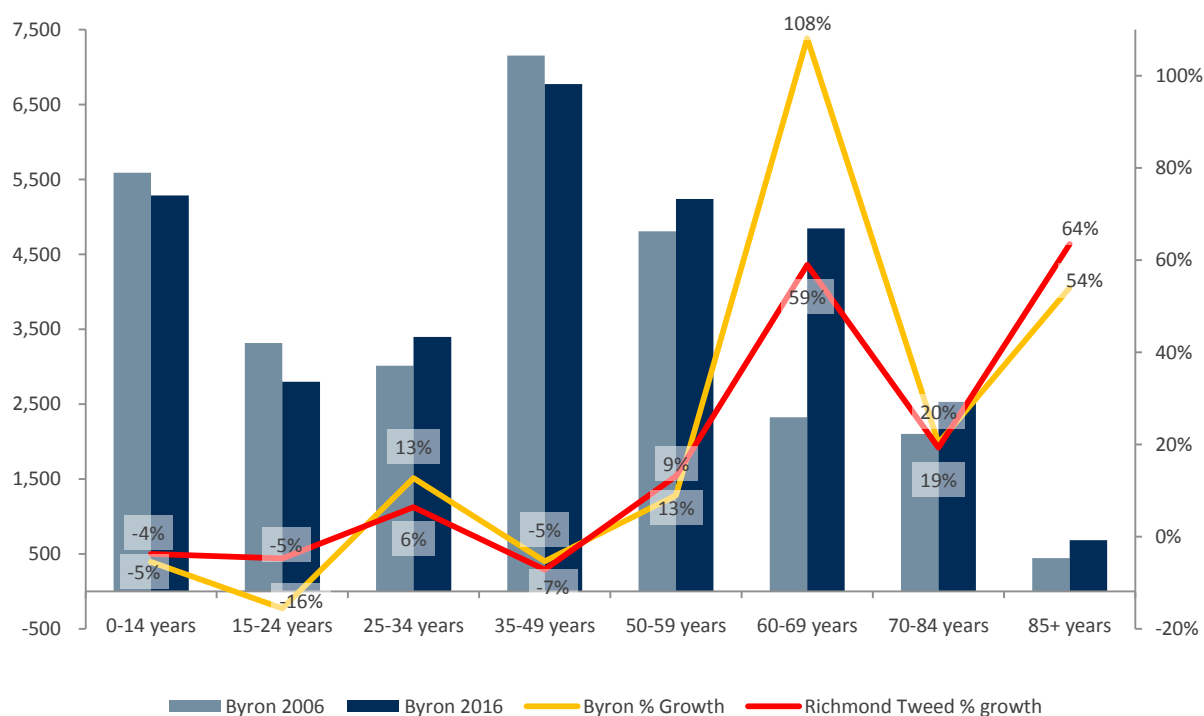
Between 2006 and 2016, the population of Byron LGA increased from 28,770 residents to 31,571. This equalled an annual compound increase of 0.93% which was higher than that for Northern Rivers Region over the same period (0.82%).

Over the period, the LGA's age profile was that of an ageing population. The age cohorts of 0-14 years, 15-24 years and 35-49 years declined, while the older age cohort of 60+ years' increased. There was also an increase in the 50 – 59 year age cohort who are typically still working or require employment options.

This trend was also reflected in the wider Northern Rivers Region which witnessed a decline / increase in the respective age cohorts experienced in Byron LGA, although, at a lower rate.

The Byron LGA experienced a 13% increase in the primary working age cohort of 25-34 years over the period.

Figure 3-2: Population growth by age composition



Source: ABS 2016 Time Series Data Community Table 3, HillPDA

3.1.2 Population projections

The NSW Department of Planning and Environment (DPE) projects that the LGA's resident population will increase by around 6,379 persons over the twenty year period to 2036. Of this additional growth, 3,250 residents or 59%, is expected to be aged 70 years and over.

Persons within the working age cohorts of 15 to 64 years are only projected to increase by 1,150 persons over to 2036, representing only 21% of the LGA's forecast additional growth. Low population growth within this primary working age cohort is likely to have implications on the amount of additional commercial, retail and industrial floor space to be developed within the LGA.

However, when compared to the Northern Rivers Region, growth in this primary working age cohorts (15-64 years in Byron LGA is relatively strong. Over the same period the wider Northern Rivers Region grew by only 1,850 persons or a proportional growth of 1%.

Byron LGA is forecast to accommodate a significant proportion of the Region's primary working age's growth (62%). It is therefore likely that a significant proportion of new businesses and demand for additional floorspace in the region will be directed towards the LGA.

Table 3-1: Population projections 2016-36

Age group	2016	2036	Proportion (2036)	Growth 16-36	% of Byron Growth	% Northern Rivers Growth
0-14 years	5,900	6,650	18%	750	14%	7%
15-24 years	3,300	3,600	9%	300	5%	0%
25-34 years	3,350	3,500	9%	150	3%	-3%
35-49 years	7,000	7,700	20%	700	13%	11%
50-59 years	5,400	5,350	14%	-50	-1%	-5%
60-69 years	4,350	4,800	13%	450	8%	8%
70-84 years	2,500	5,150	14%	2,650	48%	61%
85+ years	650	1,250	3%	600	11%	20%
Total	32,450	38,000	100%	5,550	100%	100%

Source: NSW DP&E

3.1.3 Non-schooling qualifications

Over the 15 year period from 2001, the resident population of Byron LGA attained non-schooling qualifications at a faster rate than the Northern Rivers Region. At 2016, just over 53% of the LGA's resident population aged over 15 years had attained a non-schooling qualification, a 16.7% increase from that recorded in 2001. In comparison, just over 43% the population in Northern Rivers Region had a non-schooling qualification, a 15.6% increase from that recorded in 2001.

Table 3-2: Non-schooling qualifications, persons over 15 years

	Byron LGA			Northern Rivers		
	2001	2016	Change 01-16	2001	2016	Change 01-16
Postgraduate Degree Level	1.6%	4.2%	2.6%	0.9%	2.3%	1.4%
Graduate Diploma & Graduate Certificate Level	1.6%	2.3%	0.7%	1.1%	1.6%	0.5%
Bachelor Degree Level	10.3%	17.2%	6.9%	6.4%	10.8%	4.44%
Advanced Diploma and Diploma Level	7.1%	10.6%	3.5%	5.2%	8.5%	3.26%
Certificate Level	15.9%	18.9%	3.0%	17.0%	22.9%	5.92%
Total	36.5%	53.2%	16.7%	30.6%	46.2%	15.6%

Source: ABS 2011 Census, Time Series Data

3.1.4 Unemployment rate

The unemployment rate within the Byron LGA decreased from 14.4% in 2001 to 6.5% in 2016. Compared to the Northern Rivers Region (11.2% to 7.3% unemployment rate respectively), the unemployment rate within the Byron LGA has decreased at a faster rate over the period.

3.1.5 Resident industry of employment

Over the 15 year period commencing in 2001, employed residents within the LGA increased by 2,799 or 26%, to reach a total of 13,575 in 2016.

The four most common industries that employed Byron LGA's residents remained stable over the 15 year period to 2016. These were:

- Healthcare and social assistance - (1,919 employed residents in 2016)

- Accommodation and food services - (1, 621 employed residents in 2016)
- Retail trade - (1,385 employed residents in 2016)
- Education and training - (1,322 employed residents as of 2016).

Over the period, the top three industries with the greatest growth in employment were health care and social assistance (743 employment increase); professional, scientific and technical support - (+409 jobs employment increase); construction (367 employment increase); and education and training (296 employment increase).

Residents employed within industrial job categories² decreased from 2,290 in 2001 to 1,831 in 2016. The decrease in industrial related employment is likely to decrease the demand for additional floorspace and land within the LGA.

Table 3-3: Byron LGA resident workforce industry of employment

Industry	2001	%	2016	%	Change 01-16	% of change	Northern Rivers % in 2016
Agriculture, Forestry and Fishing	597	6%	513	4%	-84	-3%	5%
Mining	15	0%	52	0%	37	1%	1%
Manufacturing	882	8%	547	4%	-335	-12%	6%
Electricity, Gas, Water and Waste Services	60	1%	69	1%	9	0%	1%
Construction	792	7%	1,159	9%	367	13%	9%
Wholesale Trade	430	4%	285	2%	-145	-5%	2%
Retail Trade	1,364	13%	1,385	10%	21	1%	11%
Accommodation and Food Services	1,341	12%	1,621	12%	280	10%	9%
Transport, Postal and Warehousing	306	3%	365	3%	59	2%	4%
Information Media and Telecommunications	209	2%	205	2%	-4	0%	1%
Financial and Insurance Services	194	2%	186	1%	-8	0%	2%
Rental, Hiring and Real Estate Services	246	2%	280	2%	34	1%	2%
Professional, Scientific & Technical Services	547	5%	956	7%	409	15%	5%
Administrative and Support Services	382	4%	631	5%	249	9%	4%
Public Administration and Safety	377	3%	430	3%	53	2%	5%
Education and Training	1,026	10%	1,322	10%	296	11%	9%
Health Care and Social Assistance	1,176	11%	1,919	14%	743	27%	16%
Arts and Recreation Services	191	2%	346	3%	155	6%	2%
Other Services	375	3%	468	3%	93	3%	4%
Inadequately described/Not stated	264	2%	834	6%	570	20%	4%
Total Industries	10,774	100%	13,573	100%	2,799	100%	100%

Source: ABS Time Series data

3.1.6 Resident workforce industry location quotient

Location quotient (LQ) is a valuable way of quantifying how concentrated a particular industry is in a region compared to a benchmark, in this case NSW. A LQ of greater than 1 reveals that there is an above representation of production in that industry compared to NSW.

The LQ is shown on the vertical axis while the change in employment from 2011 to 2016 is on the horizontal axis.

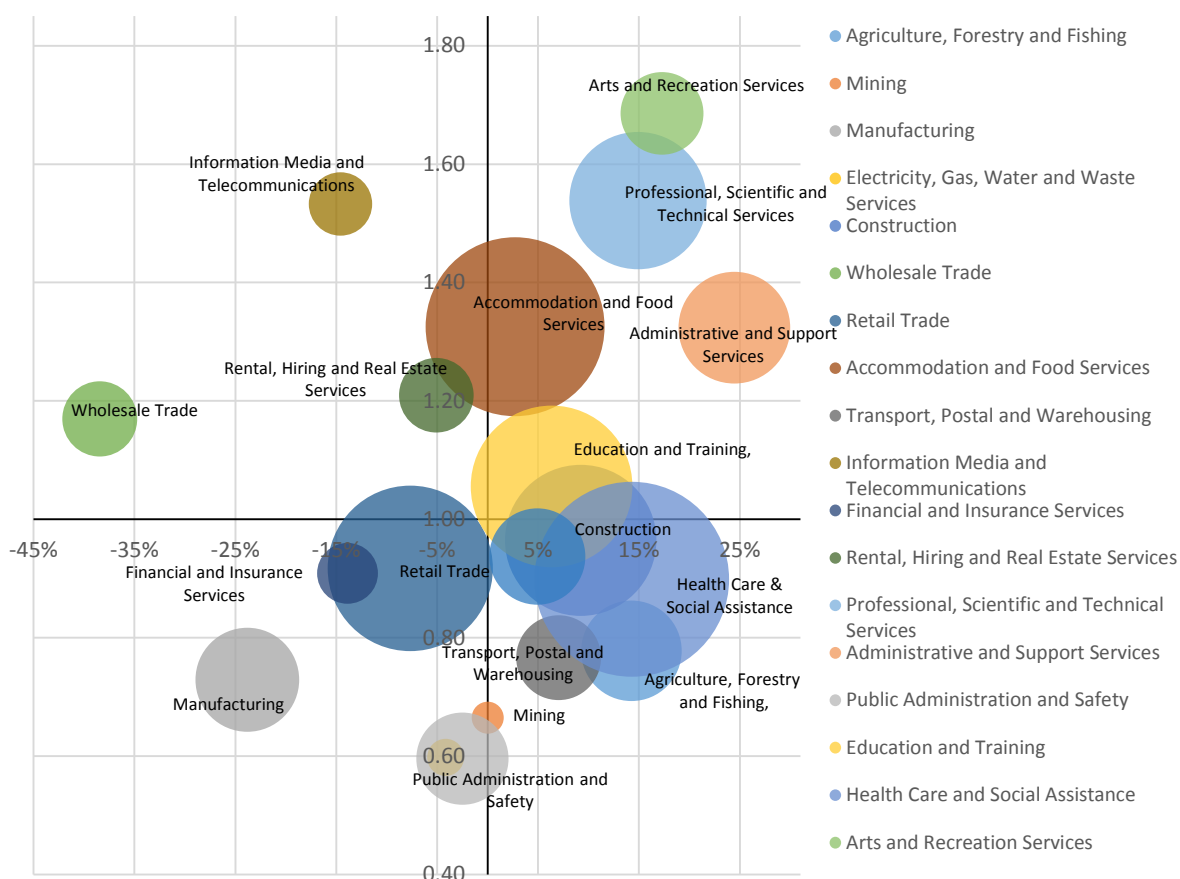
Interpreting the graph:

1. The size of the circle represents the relative size of the industry
2. The north eastern quadrant indicates specialised industries with growth over the period

² Industrial job categories are: Agriculture, Forestry and Fishing; Mining; Manufacturing; Electricity, Gas, Water and Waste Services; Wholesale Trade; and Transport, Postal and Warehousing based on the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006 used by the Australian Bureau of Statistics – Greater Sydney Commission.

3. The south eastern quadrant indicates industries with low growth and low specialisation
4. The north western quadrant indicates industries with low growth and high specialisation while
5. The south western quadrant indicates low growth and low specialisation.

Figure 3-3: Resident workforce growth-share matrix (2001-2016)



Source: ABS Time Series 2011 and 2016 – excludes inadequately described/Not stated

In the graph above the following industries were in the following quadrants:

Quadrant	Indication	Industries
North eastern	High industry specialisation and growth "industries likely experiencing an expanding stage"	Accommodation and Food Services; Administrative and Support Services; Arts and Recreation Services; Education and Training; and Professional, Scientific and Technical Services.
South eastern	Low industry specialisation and low growth "industries likely to be at the emerging stage"	Agriculture, Forestry and Fishing; Mining; Construction Transport, Postal and Warehousing; Health Care and Social Assistance; and Other Services.
North western	High industry specialisation and low growth	Wholesale Trade; Information Media and Telecommunications; and Rental, Hiring and Real Estate Services.
South western	Low industry specialisation and low growth	Manufacturing; Electricity, Gas, Water and Waste Services; Retail Trade; Financial and Insurance Services; Public Administration and Safety.

3.1.7 Household and personal income

The median personal income in Byron LGA has remained above that of the wider Northern Rivers Region over the last ten years, while median household incomes have remained lower. The lower household incomes within Byron LGA could indicate that residents may have lower disposable income, which is common in populations with large older and non-working age groups.

Lower proportions of disposable income that can be directed towards retail expenditure reduce the demand for additional services and floorspace to be developed within the LGA.

Table 3-4: Household and personal income

	Byron (2006)	Byron (2016)	Northern Rivers (2006)	Northern Rivers (2016)
Median total household income (\$/weekly)	\$932	\$1,389	\$870	\$1,265
Median total personal income (\$/weekly)	\$383	\$596	\$363	\$537

Source: 2016 ABS census

3.2 Employment generation by industry (2001 - 2016)

Byron LGA had 14,092 jobs as of 2015/16, representing a 23% increase in employment generation from that recorded in 2000/01 (11,442 jobs). Over this period almost all industry categories experienced increased employment generation. Manufacturing recorded a decrease in employment (-34 jobs) as did agriculture, forestry and fishing (-95 jobs). These two industries are associated with industrial employment categories.

Over all, the six industrial industry job categories, these being, agriculture, forestry and fishing; manufacturing; mining; electricity, gas, water and waste services; wholesale trade; and transport, postal and warehousing, collectively experienced minimal or negative increase in employment over the period.

However, employment in retail increased by 395 jobs and accommodation and food services increased by 262 jobs over the period.

In 2016 the top four employing industries were:

- Retail trade - (2,069 jobs or 14.7%)
- Accommodation and food services - (2,011 jobs 14.3%)
- Healthcare and social assistance - (1,570 jobs or 11.1%)
- Construction - (1,376 jobs or 9.8%).

These industries are primary located within existing centres. The dominance of these industries and the corresponding growth over the period may increase demand for floor space within Byron LGA's centres.

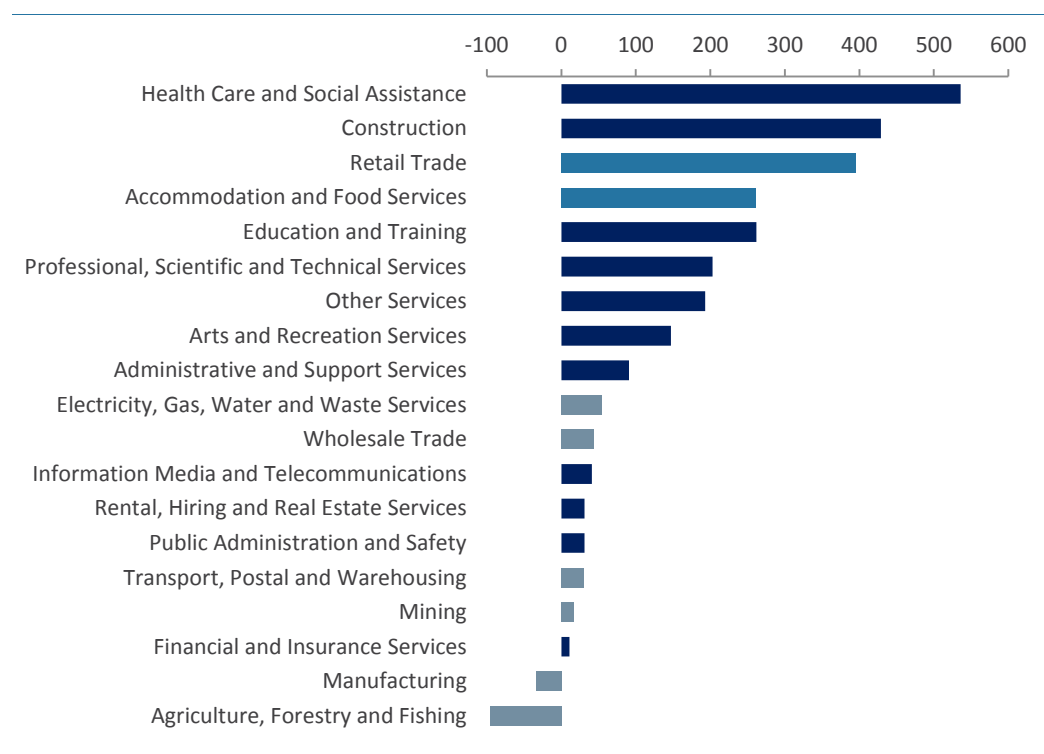
Table 3-5: Employment generation by industry (2001-2016)

	2000/01	2015/16	Change	% change	CAGR	Rank
Electricity, Gas, Water and Waste Services	77	132	55	71%	3.70%	1
Mining	26	43	17	66%	3.40%	2
Arts and Recreation Services	234	381	147	63%	3.30%	3
Health Care and Social Assistance	1,034	1,570	536	52%	2.80%	4
Construction	947	1,376	429	45%	2.50%	5
Other Services	422	615	193	46%	2.50%	5
Professional, Scientific and Technical Services	551	755	203	37%	2.10%	7
Education and Training	812	1,075	262	32%	1.90%	8
Information Media and Telecommunications	158	198	41	26%	1.50%	9
Retail Trade	1,674	2,069	395	24%	1.40%	10
Administrative and Support Services	461	552	91	20%	1.20%	11
Accommodation and Food Services	1,749	2,011	262	15%	0.90%	12
Rental, Hiring and Real Estate Services	280	311	31	11%	0.70%	13
Transport, Postal and Warehousing	330	361	30	9%	0.60%	14
Public Administration and Safety	334	366	31	9%	0.60%	14
Wholesale Trade	502	545	43	9%	0.50%	16
Financial and Insurance Services	166	178	11	7%	0.50%	16
Manufacturing	1,034	1,000	-34	-3%	-0.20%	18
Agriculture, Forestry and Fishing	650	555	-95	-15%	-1.00%	19
Total	11,442	14,092	2,649	23%	1.40%	

Source: Economy Profile

The figure below provides a visual representation on the total change in employment by industry between 2001 and 2016. Industries associated with industrial employment generation (light blue) have had minimal to negative growth over the period.

Figure 3-4: Change in employment (total) by industry, 2001 to 2016



Source: Economy Profile, HillPDA

3.3 Employment containment and self-sufficiency

3.3.1 Where Byron LGAs workers lived

In 2016, there were 12,927 jobs in Byron LGA. Of these, 9,558 or 74% were occupied by persons that also lived within the LGA.

The local workforce was also travelling from areas outside of the LGA including from Ballina LGA (1,423 workers or 11%), Tweed LGA (928 workers or 7.2%) and Lismore LGA (528 workers or 4.1%).

Table 3-6: Residential location of local workers all industries (2016)

Location	Number	Percentage	Location
Live and work in the area	9,558	73.9	Live and work in the area
Work in the area, but live outside	3,369	26.1	Work in the area, but live outside
Total workers in the area	12,927	100.0	Total workers in the area

Source: Economy Profile

3.3.2 Where Byron LGA's employed residents worked

In 2016, 70.8% (or around 9,555) of the 13,500 residents in employment in Byron LGA, worked within the LGA. Surrounding LGAs that residents travelled to for employment were Ballina (5.9% of employed residents), Lismore (5.6% of employed residents) and Tweed (4.1% of employed residents).

Table 3-7: Employment location of resident workers all industries (2016)

Location	Number	%
Live and work in the area	9,558	70.8
Live in the area, but work outside	2,893	21.4
No fixed place of work	1,048	7.8
Total employed residents in the area	13,499	100.0

Source: Economy Profile, 2016

3.3.3 Workforce participation

As of 2016, around 13,000 people contributed to the Byron Bay workforce. Part-time employees contributed the largest percentage to the workforce, with full time employees closely following. Workforce participation in the LGA was highest for those aged 40-49 years (12%), with 50-59 year olds also having a high participation rate. Interestingly, part-time work is more popular for the younger and older age cohorts (younger than 24 years and older than 60 years), most likely attributed to education commitments for the younger age and semi-retirement at an older age. Overall, the LGA has a relatively young workforce with more workers under 45 years of age.

Table 3-8: Workforce participation by age (2016)

Location	Full time	Part time	Other	Total employed persons	% workforce participation by age
15-19 years	105	473	54	637	5%
20-24 years	357	402	41	808	6%
25-29 years	572	521	61	1,151	9%
30-34 years	630	531	53	1,207	9%
35-39 years	651	585	70	1,309	10%
40-44 years	797	710	79	1,585	12%
45-49 years	850	671	63	1,580	12%
50-54 years	752	644	75	1,465	11%
55-59 years	669	695	70	1,435	11%
60-64 years	408	598	78	1,084	8%
65-69 years	145	282	24	448	3%
70-74 years	36	111	12	159	1%
75 years and over	33	46	19	91	1%
TOTAL	6,002	6,265	694	12,964	100%

Source: ABS Census 2016, W01 Labour force status by age (employed persons aged 15 years and over)

3.3.4 Employment self-containment rate (2011)³

Employment containment is a measure of the proportion of the employed population that work close to where they live, providing an indicator of the proximity of employment opportunities to residential areas. As stated earlier Byron LGA had a containment rate of 75%, with around 12,000 employed residents working within the LGA. This containment rate was higher than that for Ballina LGA and Richmond Valley (68% and 66% respectively), but was lower than Clarence Valley, Lismore or Tweed Heads (90%, 78% and 86% respectively).

Table 3-9: Richmond Tweed employment containment by LGA (2011)

LGA	Total working residents	Total residents that work in LGA	Containment rate
Clarence Valley	17,440	15,709	90%
Ballina	16,252	11,004	68%
Byron	12,059	9,078	75%
Richmond Valley	8,006	5,252	66%
Lismore	18,210	14,260	78%
Tweed heads	24,258	20,842	86%

Source: TPA 2011 JTW data Table 08

Analysis of containment rates by industry for the LGA reveals the top five industries were:

- Accommodation and food services - (91% containment rate)
- Retail trade - (89% containment rate)
- Rental, hiring and real estate services - (89% containment rate)
- Manufacturing - (86% containment rate)
- Wholesale trade - (86% containment rate).

³ At the time of this report the ABS had not release the 2016 journey to work data, which is scheduled for release in early 2018

Further, Table 3-10 orders the containment rates by the absolute number of jobs contained within Byron LGA. This indicates not only of containment rate, but also the relative importation of an employment sector to the local economy. Not surprisingly, construction is a significant local employer but jobs of this type tend to be transient as workers relocate depending on the location and type of construction projects. Similarly, health care and social assistance and education and training are large employers.

Table 3-10: Richmond Tweed employment containment by LGA (2011)

Industry	Total employed residents	Residents employed in the LGA	Containment %
Accommodation and Food Services	1,562	1,427	91%
Retail Trade	1,439	1,279	89%
Rental, Hiring and Real Estate Services	284	252	89%
Manufacturing	663	573	86%
Wholesale Trade	435	375	86%
Other Services	432	373	86%
Professional, Scientific & Technical Services	766	632	83%
Agriculture, Forestry and Fishing	441	365	83%
Arts and Recreation Services	268	217	81%
Electricity, Gas, Water & Waste Services	68	55	81%
Transport, Postal and Warehousing	307	243	79%
Information Media & Telecommunications	219	156	71%
Mining	28	20	71%
Financial and Insurance Services	185	128	69%
Administrative & Support Services	481	312	65%
Education and Training	1,189	702	59%
Health Care and Social Assistance	1,528	892	58%
Construction	1,024	595	58%
Public Administration and Safety	380	194	51%
Total	12,059	9,078	75%

Source: TPA 2011 JTW data Table 08

Based on this, accommodation and food services; professional, scientific and technical services, retail trade, manufacturing and wholesale trade are among the largest industries of employment with the largest containment rates and reflect a likely greater demand for local employment floor space than other sectors. When looking to the future, how these industries will fare over the longer term and how industry performance translates into a demand for employment lands will be key.

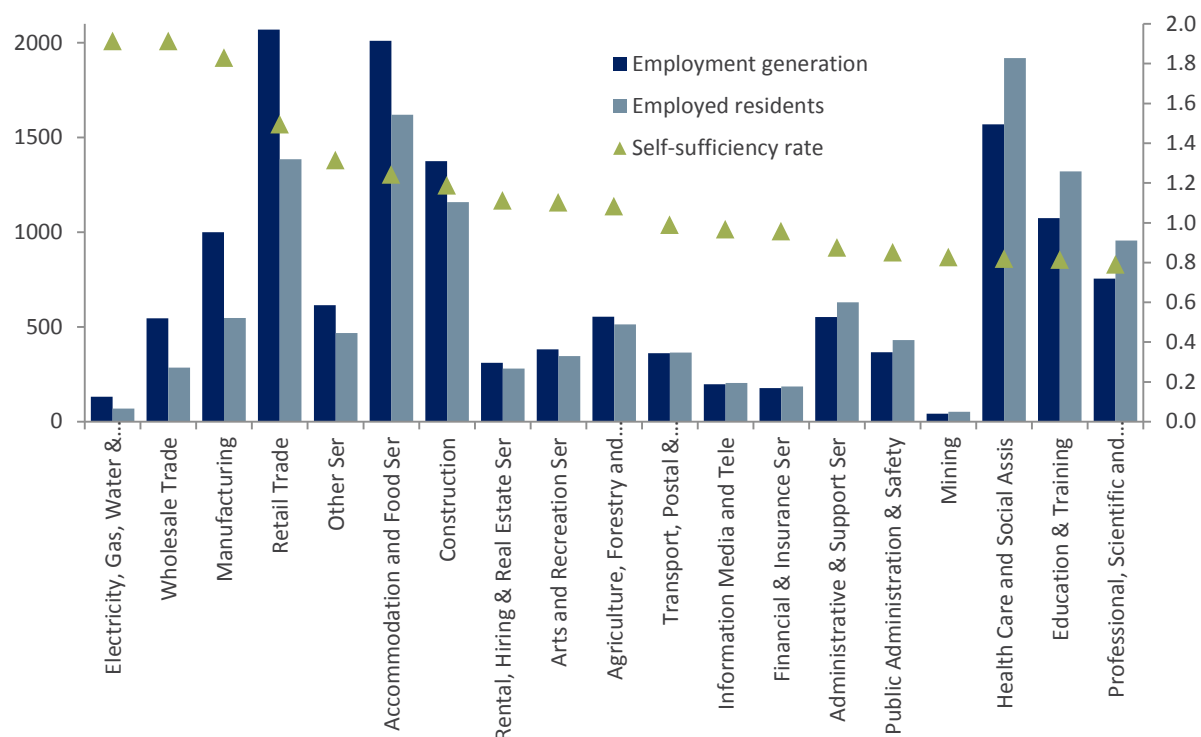
3.3.5 Employment self-sufficiency

Self-sufficiency measures the number of jobs generated within the LGA against the local workforce force. As of 2016, the LGA had a self-sufficiency rate of 111%, suggesting that there were 1.11 jobs provided within the LGA for every local resident that participated within the workforce.

Analysis of employment self-sufficiency by individual industry categories reveals that there were almost two jobs provided within the LGA for every resident employed within the industries of electricity, gas, water and waste services (1.9); wholesale trade (1.9); and manufacturing (1.8).

Industries that had a self-sufficiency rate of less than 1, where there were more employed residents than jobs in the LGA, were: administrative and support services (0.9) public administration and safety (0.9); mining (0.8); health care and social assistance (0.8); education and training (0.8); and professional, scientific and technical services (0.8).

Figure 3-5: Byron Shire self-sufficiency rate industry (2016)



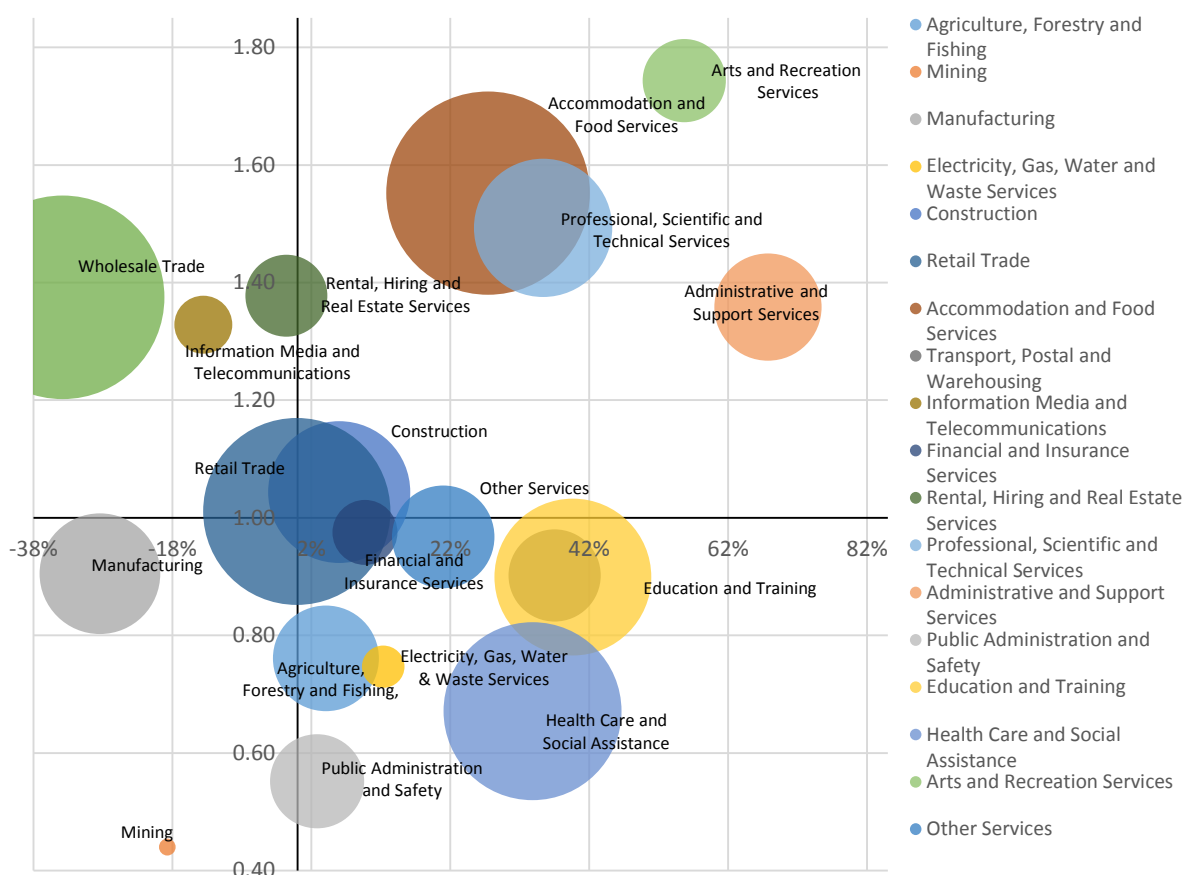
3.4 Local workforce industry location quotient

The location quotient (LQ) quantification of industry concentration for share of local workforce growth compared to NSW is provided in Figure 3-6. A LQ of greater than 1 reveals that there is an above representation of production in that industry compared to NSW.

The LQ is shown on the vertical axis while the change in employment from 2006 to 2016 is on the horizontal axis.

Refer to Section 6.1.5 for further explanation on how to integrate the graph.

Figure 3-6: Local workforce growth-share matrix (2006-2016)



Source: ABS Working Profile 2006 and 2016 – excludes inadequately described/Not stated

The following table describes the distribution of industries across each of the quadrants identified in Figure 3-6.

Table 3-11: Industry by quadrant breakdown

Quadrant	Indication	Industries
North eastern	High industry specialisation and growth “industries likely experiencing an expanding stage”	Accommodation and Food Services; Administrative and Support Services; Arts and Recreation Services; Construction; and Professional, Scientific and Technical Services.
South eastern	Low industry specialisation and low growth “industries likely to be at the emerging stage”	Agriculture, Forestry and Fishing; Education and Training; Electricity, Gas, Water and Waste Services; Financial and Insurance Services; Health Care and Social Assistance; Other Services; Public Administration and Safety; and Transport, Postal and Warehousing.
North western	High industry specialisation and low growth	Information Media and Telecommunications; Rental, Hiring and Real Estate Services; Retail Trade; and Wholesale Trade.
South western	Low industry specialisation and low growth	Manufacturing; and Mining.

3.5 Gross Regional Product (GRP)

In 2016, Byron LGA's Gross Regional Product (GRP)⁴ was \$1.56 billion, representing a 28% increase from that generated in 2001 (\$1.22 billion). This proportional growth was greater than the 22% increase in GRP recorded for Regional NSW and 27% increase across the Northern River Region over the period⁵.

Comparatively, Byron LGA's economy grew at a marginally faster rate (1.7%) than the rest of Regional NSW and Northern Rivers Region at 1.3% and 1.6% respectively.

Table 3-12: Gross Regional Product (2001-16) (\$billion)

	2001	2016	Proportional increase	CAGR6
Byron LGA	1.22	1.56	28%	1.7%
Northern Rivers	9.21	11.73	27%	1.6%
Regional NSW	106.81	130.58	22%	1.3%

Source: Economy Profile

3.5.1 Value added by industry

Industry value added (IVA) of an industry refers to the value of outputs less the costs of inputs. It measures the net contribution that the industry makes to the country's wealth. In 2015/16, the four largest industries, by IVA were:

- Accommodation and food services (\$129 million)
- Health care and social assistance (\$125 million)
- Construction (\$114 million)
- Retail trade (\$111 million).

In 2000/01 manufacturing was the largest contributing industry to Byron's economy (\$122 million). However, over the 15 year period it has experienced a \$45 million or 37% decline in IVA. In 2015/16, manufacturing was the fifth largest industry, contributing \$77 million to the LGA's GDP.

Proportionally, health care and social assistance; accommodation and food services and retail trade have significantly increased over the period. Mining has also significantly increased over the period (proportionally) but by 2015/16 was the industry with the lowest contribution.

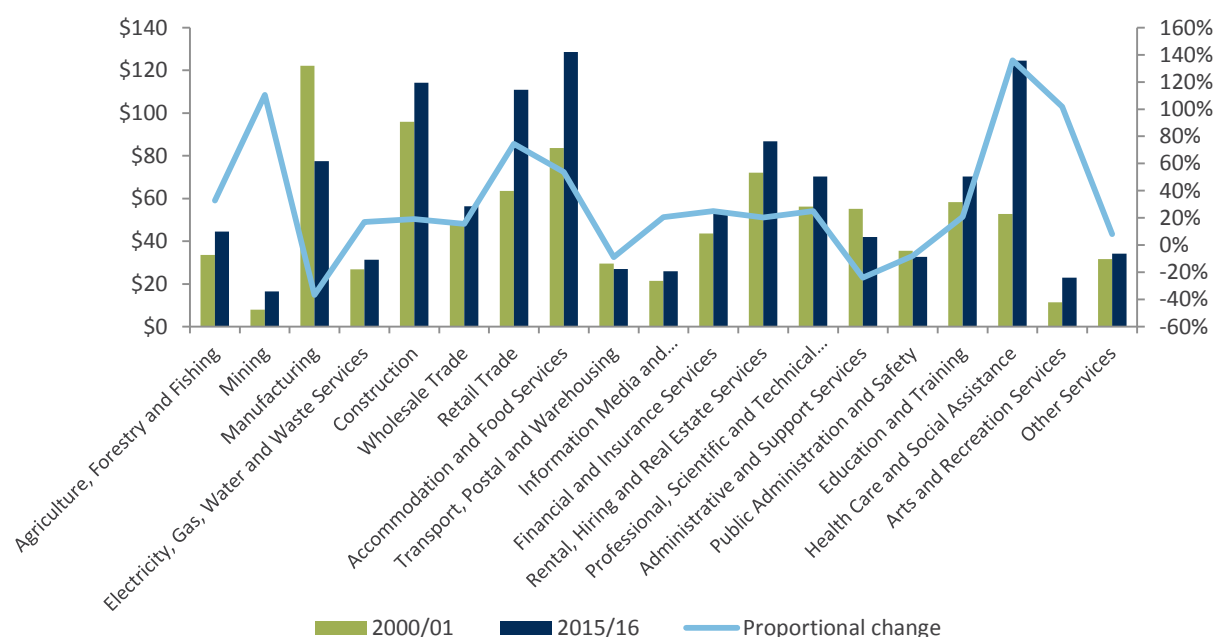
Figure 3-7 provides a summary of key economic movements between 2001 and 2016.

⁴ Local Industry GRP shows the value of the local economy, generated by the local workers within the area regardless of where they live, after taxes and dividends leave the area. It is best thought of as GRP produced by local industries (Economy Profile)

⁵ Economy Profile

⁶ Compound Annual Growth Rate

Figure 3-7: Value added by industry Byron LGA (\$m)



Source: Economy Profile

3.6 Business counts by industry

Analysis of business counts in Byron LGA reveals that between 2015 and 2016 an additional 229 business were recorded. This is significant given that only an additional 27 businesses were recorded over the previous four years between 2011 and 2015.

Table 3-13: Business counts by industry

Industry	2011	2015	2016	Change 11-16	Change 11-16 (%)
Agriculture, Forestry and Fishing	421	414	396	-24	-6%
Mining	9	9	6	-3	-32%
Manufacturing	173	172	194	21	12%
Electricity, Gas, Water and Waste Services	9	3	6	-3	-32%
Construction	586	571	633	47	8%
Wholesale Trade	188	185	182	-6	-3%
Retail Trade	382	368	391	9	2%
Accommodation and Food Services	260	298	319	58	22%
Transport, Postal and Warehousing	134	141	138	4	3%
Information Media and Telecommunications	94	76	76	-18	-19%
Financial and Insurance Services	176	204	218	42	24%
Rental, Hiring and Real Estate Services	419	413	428	9	2%
Professional, Scientific and Technical Services	518	522	534	16	3%
Administrative and Support Services	131	154	164	32	24%
Public Administration and Safety	15	9	9	-6	-39%
Education and Training	76	83	104	28	37%
Health Care and Social Assistance	252	306	318	66	26%
Arts and Recreation Services	105	93	112	8	8%
Other Services	137	124	136	-1	-1%
Industry not classified	81	48	57	-24	-30%
Total business	4,166	4,193	4,422	256	6%

Source: Economy id

Between 2011 and 2016 the health care and social assistance and accommodation and food services industries added an additional 66 and 58 business respectively. The increase in accommodation and food services businesses, and the corresponding increase in employment, reinforces the role tourism plays within the LGA's economy. The tourism industry further directly and indirectly drives demand for additional services and businesses such as those within the retail; wholesale; real estate and construction industries.

With the LGA's ageing population, health care and social assistance services are increasingly going to drive both demand for additional space and employment. This is evident in the industry being the fastest growing (by number) and being one of the four largest employers.

Additionally, over the period an additional 21 manufacturing businesses were recorded within Byron, in contrast to the wider Richmond Tweed area which recorded a decline in manufacturing businesses over the period (36 businesses). This highlights the LGA's importance as a primary location within the Richmond Tweed region for industrial businesses, possibly due to the LGA's close proximity to two airports and the Pacific Motorway.

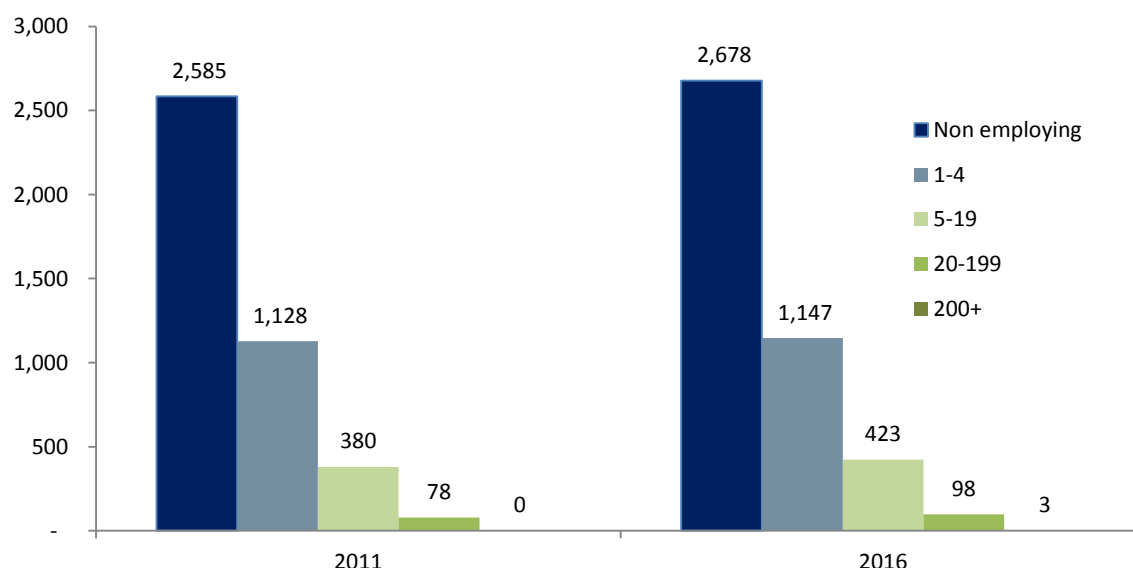
3.6.1 Business counts by number of employed staff

All business employment sizes have increased over the five year period from 2011. Proportionally, businesses employing 20-199 employees increased the greatest (26%), increasing from 78 businesses to 98 businesses in 2016.

Just over sixty percent of businesses within the LGA were sole traders in 2016, with the total number of businesses in this category increasing since 2011. Proportionally, all other business sizes categories have remained stable over the period.

Significantly, the number of businesses employing 200+ employees increased from no businesses in 2011 to three businesses in 2016. All three businesses were within the industry of health care and social assistance.

Figure 3-8: Business count by number of employed staff



Source: ABS 8165.0 Counts of Australian Businesses, including Entries and Exits

4.0 TRENDS AND DRIVERS

This section analyses trends at a macro and in some cases a micro level, in order to better understand potential future influencers to employment and employment generating land uses in the LGA. Local, regional and global trends, combined with future drivers, affect employment generating land uses, their success and economic viability, particularly the type, location and labour skill requirements.

Together with key trends and drivers for each sector, it is important to understand the wider market context to ensure the strategic advice provided is robust and capable of implementation.

4.1 Industrial trends

Demand for industrial floor space is influenced by the globalisation of trade, wider use of information technology and online retailing. Today's global economy consists of sophisticated linkages between businesses, which are designed to enable the efficient sharing of information and the delivery of goods through a global supply chain. This supply chain, once thought of as the flow of goods through production to the end user, can now be seen as an alignment of firms that design, develop, market and produce goods and services and deliver them to the customer when needed.

Industrial floor space used primarily for business related storage is in secular decline, whereas demand for space built for the transfer of goods is increasing. This 'high throughput distribution' space is essentially designed to facilitate the rapid movement of goods through the supply chain. In essence, businesses with low inventory turnover are gravitating to inexpensive land and low cost buildings. For example, traditional lower grossing industrial uses moving out of the Byron LGA Industry and Arts precinct, while higher through-put businesses are moving in.

Retail and industrial operations are becoming increasingly aligned, with omni-channel real estate emerging as a key trend in 2018. Supply chain efficiencies is a key for the success of the retail sector with the rise of online retailing has also driving demand for warehousing and distribution centres. A recent article prepared by CBRE and Jagonal indicated that proximity to key transport routes is one of the priorities for industrial occupiers due to supply change efficiencies and the increasing geographic division between consumption and production . The LGA's connection to the Pacific Motorway has it well placed to service demand for product distribution.

The evolution of industry is impacting on occupier demand. Industrial demand is increasingly being influenced by technology with high-tech manufacturing replacing traditional manufacturing. As production and manufacturing technologies evolve, there will most likely be a shift in the scale and land requirements of businesses. While the size of distribution and warehousing increases, manufacturing will become more automated reducing floorspace and car parking requirements. This will be more evident in major markets before filtering to the regions.

At the time of the study, a search of realcommercial.com indicated no subdivided, vacant land available for industrial redevelopment. However, according to land zoning maps, there are undeveloped englobo sites available that would require a development application to subdivide for industrial purpose. This land generally represents longer term supply and is dependent on the owner to action the subdivision. Future subdivision should be geared to the needs of changing and modern industries.

The future supply of industrial land needs to be able to respond to these trends.

4.2 Food production and manufacturing

The Australian food processing and manufacturing industry has been required to respond to consumer demands and trends for more convenient, healthier, fresher and less processed foods with minimal storage times. The Byron LGA has been quick to meet these challenges, with over 100 agricultural producers and food manufacturers promoting local grown and sustainable food options.

Northern Rivers has a strong local food network that supports the growth, production and manufacturing of quality, gourmet and artisan food products. The *A Northern Rivers Food and Beverage Handbook (2017/2018)*, indicates a growing demand in the export market for sustainably grown, affordable and uniquely local food and beverage products. The effective branding of 'Byron' as a creative and sustainable food economy has resonated with domestic consumers in the retail setting and at the chefs table. It is anticipated that the trend for local food production and manufacturing will continue, with growing demand for appropriately located food and beverage processing space.

The recent 'Food Hub' application demonstrates interest from the private sector to further develop space for food processing. There has also been anecdotal evidence suggesting that Brookfarm and Salumi have requirements for over 5,000sqm factories to accommodate their expansion plans, with appropriate space limited in the LGA⁷.

Food production and manufacturing straddles the expanse between industrial operations and rural operations. Various employment precincts within the LGA contain food processing and manufacturing facilities with demand growing as more companies seek to benefit from co-locating in the renowned area. These land uses will compete with traditional industrial uses if supply of land is limited.

4.3 Retail trends

The future of retail is shifting towards experience and convenience with technology driving change⁸. Over the past three decades, significant change has occurred in the retail industry, of which online retailing has caused the largest disruption. The retail industry's innovative nature is driven largely by the need to anticipate and respond to its customers' needs and desires. Changing socio-demographics and lifestyles, require individual retailers to constantly monitor shifts in demand and reposition their offer, presentation and in instances mode of operation and distribution. Factors influencing the retail sector in the LGA include:

- Online retail platforms increasing competition and expanding market opportunity
- Out-of-centre retailing
- Increasing demand for retail distribution outlets and warehouses in industrial areas
- Leveraging visitor economy
- Introduction of accommodation sharing platforms (i.e. Airbnb) improving affordability of short-stay accommodation options and increasing visitor numbers
- The ageing of the population
- Income disparity between some tourists and residents.

A major topic of debate regarding the future of retail in Australia is the continued growth of online retail and the impact this may have to 'bricks and mortar' retail.

⁷ Dobney, C 2016, '20-acre food factory and outlet precinct plan for Bangalow', cited at: echo.net.au viewed 20/2/2018

⁸ CBRE 2018 Market Outlook - Australia

The National Australia Bank (NAB) estimates that Australians spent around \$22.23 billion on online retailing, this was equivalent to 7.3% of the traditional bricks and motor retail sector in March 2017, although market penetration rates vary significantly across category types. Retail analysts agree that this will grow in the future although there is no consensus as to the amount of growth that can be expected⁹.

The growth of online retail is changing the way shoppers interact with physical retail stores, both expanding the opportunity for smaller boutique retailers in regional areas to access larger customer markets and creating competition for established bricks and mortar premises. In the last year, online purchases have increased by 11.5% compared to 2016, with many shoppers switching to online sources due to better prices, more variety, easier comparisons and convenience¹⁰. Buyers in tourist towns, such as Byron Bay, are more commonly shopping online in a bid to seek more affordable prices for everyday essentials¹¹.

An opportunity for online markets and the promotion of unique 'Byron' brands has seen the emergence of local entrepreneur retailers manufacturing and distributing goods 'made in Byron'. Online retailing has enabled boutique or speciality retailers such as Trip-A-Deal, Spell Design, Afends, Rowie, Yoli & Otis, Hendrix and Harlow and St Agni to compete in a broader market, with less reliance on traditional shops.

Despite growth, a number of barriers in online retailing are preventing some business owners in Byron leverage this market to the greatest potential. These include:

- Slow or limited internet connectivity across the LGA
- Postal distribution not regularly servicing some locations
- Limited vacancy in warehouse and distribution space.

The emergence of online retailing has affected land use and building requirements. Byron is seeing a growing demand for warehousing and distribution facilities, particularly in the Byron Arts and Industry Employment Precinct. There is growing evidence of clustering and co-location of entrepreneurial and creative businesses with the Byron Arts and Industry Estate and the new creative hub in Bangalow. As the Byron 'brand' continues to grow and cluster, it is likely that more entrepreneurs and local retailers will seek to establish themselves in the Byron market.

The following trends will influence the nature of retailing in centres in the future:

- **Increased need for engaging store experiences:** stores are less likely to be able to compete on price comparative to the internet but by promoting shopping as an experience through, for example, outstanding in store service, engaging shopfronts/ storefronts, fitouts, instore entertainment and interactive design
- **Multi-media integration:** this trend will see the merging of virtual multi-media with the in-store and in-centre experience enabling customers to check prices and product ranges on smartphones in real time (e.g. augmented reality technology)
- **Click and collect:** this trend refers to the process through which a shopper pays for goods online but collects goods from a local store or drop-off point. The growth of technology and multi-media integration will see greater numbers of businesses offering 'click and collect' and the positioning of centres as convenient hubs for collecting goods ordered online.

The online retail trend is supporting growth in out-of-centre retailing for retail that has a primary orientation to bulky goods retailing or online retailing outlet spaces. This trend has been observed in the Byron Arts and

⁹ NAB Online Retail Sales Index: Indepth report – March 2017

¹⁰ 2017 eCommerce Industry Paper, Australia Post and Startrack

¹¹ ibid.

Industry employment precinct and is emerging in the Bangalow employment precinct, where the retail industry is becoming more prominent. The Byron Arts and Industry employment precinct is increasingly becoming a destination shopping area, attracting visitors and customers to the unique and diverse retail offer and setting. The area has lower overhead costs compared to the main Byron Bay Town Centre and opportunities to collocate production and sales. Retailers are attracted to the lower rent structures and flexible spaces which are not traditionally found in the main town centre.

The impacts of this trend will be felt by traditional nodes of retail activity, which may experience a loss in trade. Traditional industrial uses may also be affected with some “pushed out” of an area due to increases in land value and rents arising from an influx of higher paying retail uses. This shift is also impacting on the function of the employment precincts with increased volumes of light vehicle movements and in some cases a lack of off-street parking is affecting the capacity of larger vehicles to move around the precinct.

4.4 Tourism trends and drivers

Accommodation and Food Services, Retail Trade and Arts and Recreation Services are all important components of the tourism sector and Byron LGA’s local economy. Understanding the tourism market, tourist visitation rates and tourism trends will help identify strategies and opportunities to build a relationship between culture and tourism.

The economic value of tourism in regional destinations is largely driven by the business community. Efforts in destination marketing and infrastructure development support or build on the success of businesses. Regions with high visitation but low business engagement may struggle to profit from tourism. Strategies aimed at specific types of tourism such as cultural tourism need to involve businesses in identifying commercial opportunities.

There are a range of tourism attractions commonly identified as being within, or in close proximity to the ocean. The most common attractions include but are not limited to the following:

- The various town centres such as Byron Bay, Bangalow and Brunswick Heads
- The coastline with its multitude of beaches
- Cultural venues and events including Byron Bay Writers’ Festival, annual Byron Latin Fiesta, Ballina Country Music Festival, Mullumbimby Music Festival, Bluesfest, Splendour in the Grass
- Markets including Bangalow Market, Byron Bay Community Market and Mullumbimby Farmers’ Market.

In addition to these main attractions there are various parks, walks, cafés and restaurants that support the tourism industry. Tourism Research Australia (TRA) report that, over 1.5 million people visited Byron LGA in 2015. Of these, 167,000 were international visitors, 584,000 were domestic overnight and 776,000 were domestic day visitors. The average stay was seven nights for international and four nights for domestic overnight visitors. Combined, visitors to the LGA spent \$504 million with 70% of this (\$355 million) being spent by domestic overnight visitors in 2015.

The most common reason for visiting the LGA was for a holiday, followed by visiting friends or relatives. Of the domestic overnight visitors 33,000 stated business was the reason for their visit. In 2014, Byron LGA’s tourist visitor profile indicated:

- The main proportion (58%) of overnight domestic visitors to the LGA travel from interstate locations, which is higher than the state average (32%)
- The main purpose for overnight domestic travel to the LGA was for a holiday, which is significantly higher than the state average

- When staying in the LGA, the majority (27%) of travellers stay at a caravan park or commercial camping ground, which was more than double that recorded for the state (13%)
- The main activity undertaken in the LGA was to eat out at restaurants (68%) and go to the beach (64%). These activities were significantly higher than the rest of state (58% and 23% respectively)
- The majority of domestic overnight tourists are 15-44 years of age and are parents travelling with children.

In 2015, there were 783 tourism businesses in the LGA and this was 11% of the total 6,872 businesses recorded in the North Coast of NSW.

Table 4-1: Tourism business overview

Business size	Byron LGA	North Coast NSW*
Micro (1-4 employees)	240	2,246
Small (5-19 employees)	183	1,618
Medium (20-199 employees)	35	291
Large (200+ employees)	0	9
Total employing	458	4,164
Non-employing	325	2,708
Total	783	6,872

Source: TRA 2015 *As defined by Tourism Research Australia

Over the short term, TRA research forecasts that total tourism spending (including spending by international visitors, and overnight and day trip spend by Australian residents), is to increase by 4.7% to \$126.2 billion in 2017–18 and a further 4.6% to \$131.9 billion in 2018–19¹². Over the longer term, TRA expects the 10-year average growth rate to be around 3.7%, which is net of:

- A 6.7% average annual growth in international spend (\$39.8 billion in 2016–17 to \$75.8 billion in 2026–27)
- A 2.1% average annual growth in domestic overnight spend (\$61.4 billion in 2016–17 to \$75.5 billion in 2026–27)
- A 1.3% average annual growth in day trip spend (19.3 billion in 2016–17 to \$21.9 billion in 2026–27)¹³.

TRA suggests that by 2026–27, the five largest inbound markets will be China, the US, the UK, NZ and India, which will represent over 58% of inbound visitor spending¹⁴.

The ongoing strength of the tourism market underpins the Byron economy and will continue to do so. However, growing number of ‘informal’ short stay accommodation premises that have emerged due to sharing platforms such as AirBNB is having a direct and indirect impact on businesses and employment land across the LGA.

Anecdotal evidence during the business surveys and observations during the floor space audit identified a growing presence of residential or short-term accommodation uses in industrial estates. Although this is largely a compliance issue as residential uses are prohibited under the Byron LEP, its difficult to monitor. This places traditional industrial uses at risk if land values inflate, rents increase or operation causes reverse amenity impacts.

¹² Tourism Research Australia. “Tourism Forecasts 2017”. August 2017. Page 12.

¹³ *ibid.*

¹⁴ *ibid.*

4.5 Workspaces

Flexible work arrangements and spaces are in greater demand as work practices respond to shifts in technological capabilities and employee preferences. Workers are increasingly mobile, with the choice to work from home often made by people setting up their own businesses or from the knowledge based industry where people do not need to be physically in the office. Key fields of home base business generally include the creative industries, professionals, online retailers, virtual offices or professional suites (e.g. psychologists).

The integration of technology in the workplace provides opportunity for people to work remotely. The traditional desire for prime location is no longer everything, with businesses increasingly looking for adaptable office space, coupled with quality lifestyle opportunities. Byron LGA has and will continue to see an emergence of businesses that are locating to the LGA for its lifestyle offering.

Co-working or shared office spaces are also a growing workplace trend with an increasing number of sole traders or small businesses choosing to share office space with other entrepreneurs and small businesses. This is particularly popular for the creative industries, who value ideas sharing and dynamic environments. Co-working spaces are defined locations where individuals from multiple businesses can engage in work. These spaces generally operate on a monthly membership basis, with members gaining access to all facilities and services. In regional locations, where internet access can be poor and lifestyle attraction and ideas sharing opportunities are strong, co-working spaces provide an appealing solution for many entrepreneur and small business owners.

There is also an emerging trend for more flexible and co-located industrial units and warehouses where small businesses and start-ups can experiment. Industrial units that are available on flexible term leases, similar to co-working office spaces, can encourage innovation and provide affordable options for new business operators.

4.6 Health and education services

Education and Training and Health Care and Social Assistance are important economic drivers in the Byron LGA. Employment growth in this sector will be influenced by investment in health and education infrastructure and underlying demographic trends.

Health and education facilities are generally not located in employment precincts or centres but they are important employment generators that a significant influence on the function and operation of locations. The establishment of the new purpose built hospital to the west of Byron Bay at Ewingsdale, can generate demand for space from complementary medical services such as physiotherapists, occupational therapists, pathologists and the like. This may “drive up” demand for commercial suites located in proximity to the hospital. Similarly, aged care services often benefit from collocation with hospitals.

The new Byron Central Hospital has been designed to provide integrated services for hospital patients and community health clients, as well as an enhanced working environment for clinical and ancillary staff. An aerial view of the hospital is shown in Figure 4.1.

Services to be offered include:

- 24-hour emergency attention
- 43 overnight inpatient beds
- Low-risk maternity services following the same model currently delivered at Mullumbimby
- A new 20-bed, non-acute mental health unit
- Enhanced X-ray and medical imaging
- Dental service, satellite chemotherapy, and ambulatory care

Figure 4-1: Byron Central Hospital



Source: Northern NSW Health District

Demand for space suited to health care and social services space is likely to grow in the future. Colliers predict that the number of Australians aged 65 and over will grow disproportionately faster than other age cohorts, more than doubling from 3.6 million people to 8.5 million people between 2015 and 2055¹⁵. Currently Government spending on aged care accounts for the vast majority of public spending. However, as aged care steers away from public funding, there could be increased spending from private sources in the future.

Colliers estimates that there are about 184,000 Australians that live in retirement villages, representing only 5.7% of the population that is 65 and older. Collier's predict that by 2025 this penetration rate could increase to 7.5% which would represent a near doubling of retirement village residents across Australia¹⁶. This national trend will have implications for land use demand.

Traditionally, seniors facilities have been viewed largely as a health care facilities, but increasingly a number of service providers are creating service offerings that target premium living and independent living lifestyles. If successful, this strategy could create an underlying demand for land to provide residential accommodation and health facilities collocated. This may present both opportunities and challenges to locate suitable sites in terms of noise, amenity, transport and infrastructure.

The education sector in Byron LGA is also changing. Revised projections suggest an increase in school-age public school students of 15,000 a year, which is three times higher than the NSW Department of Education's previous assumption of 5,000 a year¹⁷. The Government has acknowledged that there is an under-funding in education infrastructure in NSW including Byron LGA. The NSW Government is planning a major capital works

¹⁵ Colliers International. "Health Care and Retirement Living: Research and Forecast Report" September 2016. Page 5.

¹⁶ Colliers International. "Health Care and Retirement Living: Research and Forecast Report" September 2016. Page 18.

¹⁷ Sydney Morning Herald. "\$11 billion school funding shortfall raises prospect of shortage of classrooms for thousands". April 2016. Retrieved from <http://www.smh.com.au/national/education/11-billion-school-funding-shortfall-raises-prospect-of-shortage-of-classrooms-for-thousands-20160421-gocfgo.html>. Retrieved on 18 September 2016.

upgrade across the State and specifically at Byron Bay Public School to address a shortfall in existing infrastructure and meet the long term education needs of Byron Bay¹⁸.

There is also potential for growth in the tertiary education sector. SAE Qantum Creative Media Institute offers Government accredited certificates, diplomas and bachelor degrees in animation, audio, film, games and web and mobile. The campus is situated to the west of Byron Bay on Ewingsdale Road. The Southern Cross University has its main campuses in Lismore, Coffs Harbour and the Gold Coast but also has a study centre located at the SAE's campus. The study centre provides space for students to study and work and network. Although not located in a centre or employment zone, the long term growth of these facilities could present some opportunities for the LGA.

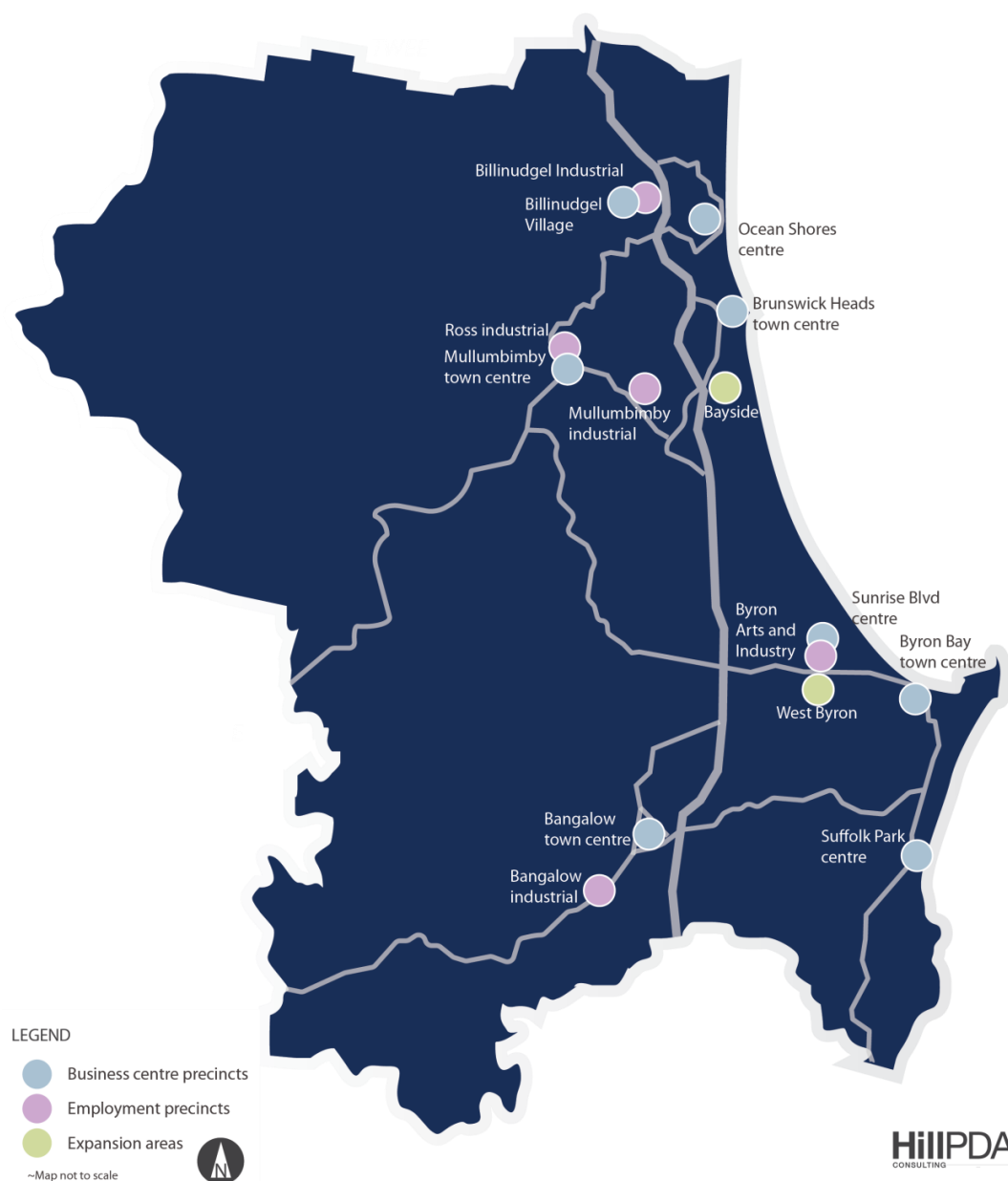
¹⁸ NSW Department of Education. "Byron Bay Public School: Project overview". Retrieved from <http://www.dec.nsw.gov.au/about-the-department/our-reforms/innovative-education-successful-students/school-upgrades/byron-bay-public-school>. Retrieved on 18 September 2017.

PART 2
ASSESSMENT OF
EMPLOYMENT LANDS

5.0 PRECINCT PROFILES

Findings of the floorspace audit, online research and business engagement have informed the precinct profiles. Byron LGA has around 126 hectares of land zoned for employment uses distributed across employment precincts, business centre precincts and planned expansion areas (see Figure 5-1). Employment precincts contribute to 57 per cent of the total employment land area and 46 per cent of the gross floor area within the LGA. The centres contribute less to the employment land area (43 per cent), but have a greater quantum of floor area (54 per cent). The following section provides an overview of the employment precincts and business centre precincts. Precinct profiles have been developed on the basis of land use audits and site visits undertaken in October of 2017.

Figure 5-1: Byron LGA Employment Land



Source: HillPDA 2018

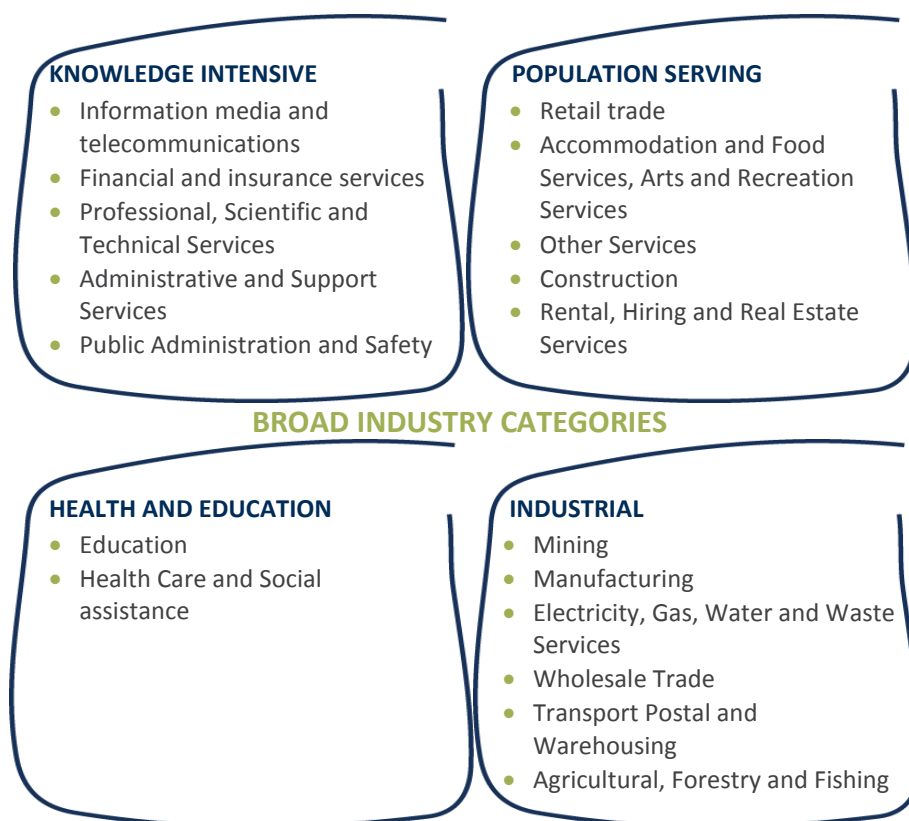
5.1 Employment precinct overview

Byron LGA's employment precincts comprise a range of industrial and urban services that support the local population and contribute to the broader economy. The employment precincts range in size and scale.

LAND AREA		GROSS FLOOR AREA	
Zoned land	72 hectares	Total GFA	202,000 sqm
Total vacant land	24 hectares	Vacant GFA	7,741 sqm
Average lot size	2,000 sqm		

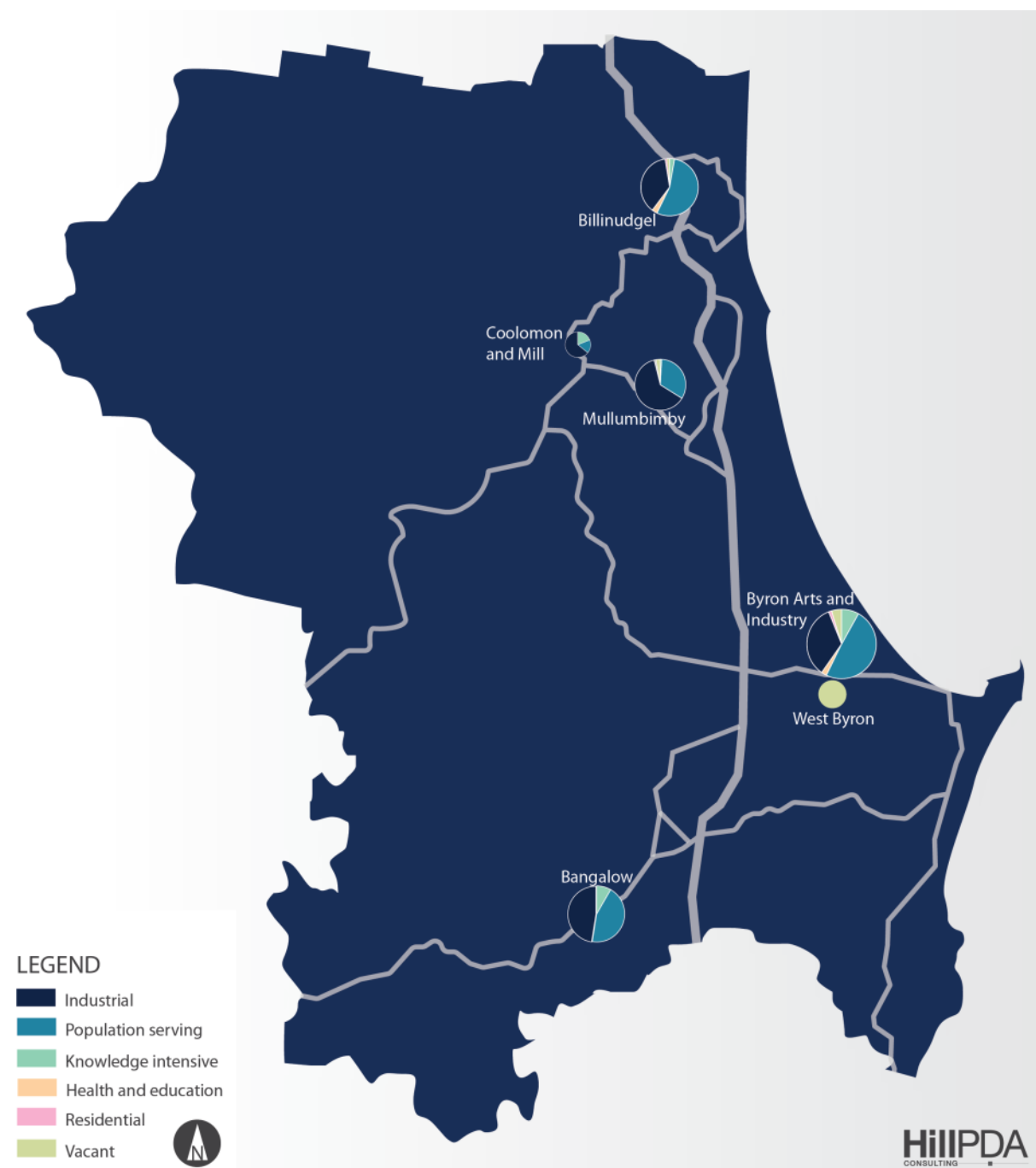
Uses within the precincts can be categorised into four broad industry themes as outlined in Figure 5-2.

Figure 5-2: Broad employment precinct categories



There are five existing employment precincts in the LGA and one future release employment precinct (West Byron), as identified in Figure 5-3 and in Table 5-1. The Byron Arts and Industry employment precinct is the largest precinct in the LGA, with the greatest diversity of uses. The pie charts in the figure below represent the proportional floor area of each broad industry category and the size represents its scale in relation to other employment precincts.

Figure 5-3: Spatial distribution of employment precincts



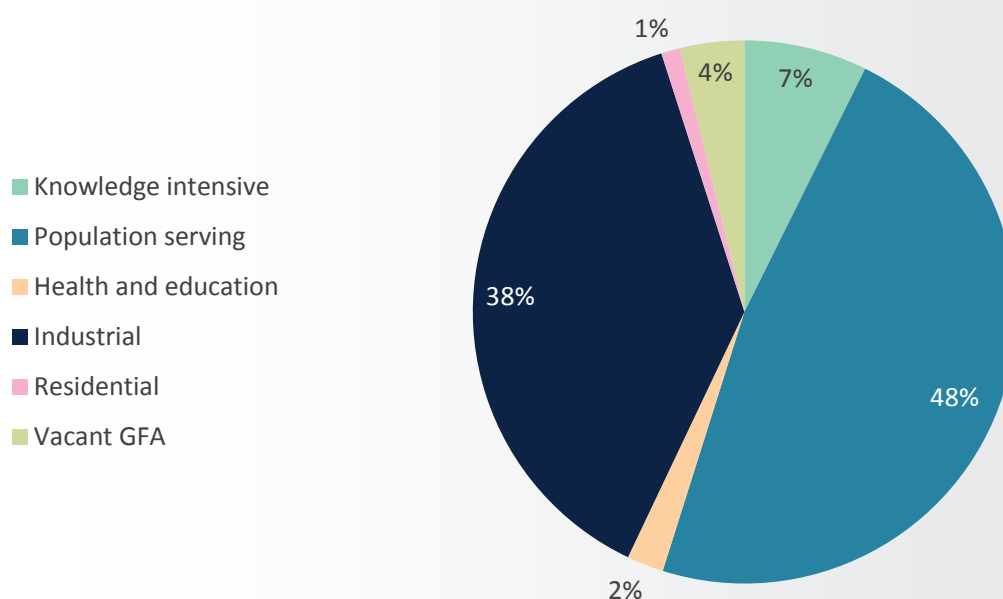
Source: HillPDA, 2018

Table 5-1: Employment precinct summary

Employment precincts	Land use zone	Broad category	Top 3 Industries (GFA)
Byron Arts and Industry	B7 – Business Park IN2 – Light Industrial	Population serving	Rental, Hiring and Real Estate Services Arts and Recreation Services Transport, Postal and Warehousing
Mullumbimby	IN1 – General Industrial	Industrial	Transport, Postal and Warehousing Other Services Manufacturing
Coolomon Scenic Drive and Mill Street	IN1 – General Industrial	Industrial	Arts and recreation services Rental, Hiring and Real Estate Services Administrative and support services
Billinudgel Industrial	IN1 – General Industrial	Population serving	Rental, Hiring and Real Estate Services Other Services Wholesale Trade
Bangalow Industrial	IN1 – General Industrial	Industrial	Rental, Hiring and Real Estate Services Wholesale Trade Manufacturing
West Byron	IN2 – Light Industrial	Vacant	Vacant

The gross floor area of Byron’s employment precincts are predominantly oriented towards population serving or knowledge intensive broad industry sectors. This is generally consistent with other regional locations, where services mainly support the local population (i.e. personal storage facilities). Figure 5-4 identifies the distribution of total gross floor area of all employment precincts across the broad industry categories.

Figure 5-4: Employment precinct GFA distribution across broader industry categories



The overall breakdown of floor space across specific industry types can be found in Table 5-2. The contribution of each industry to the overall employment precinct GFA is also identified. Retail trade, manufacturing and wholesale trade comprised the most floor area.

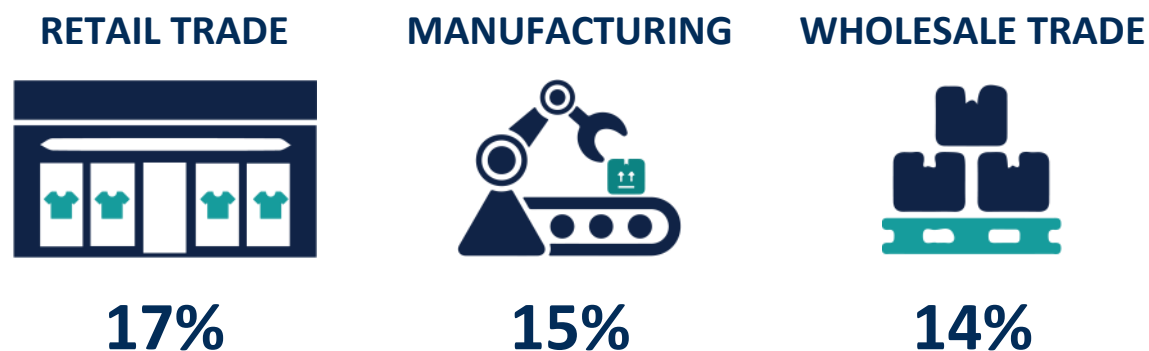


Table 5-2: Industry floor space breakdown

Industry	Floor space (sqm)	Floor space contribution (%)
Agriculture, Forestry and Fishing	789	0%
Mining	0	0%
Manufacturing	30,530	15%
Electricity, Gas, Water and Waste Services	60	0%
Construction	5,897	3%
Wholesale Trade	27,663	14%
Retail Trade	34,281	17%
Accommodation and Food Services	1,471	1%
Transport, Postal and Warehousing	17,775	9%
Information Media and Telecommunications	1,032	1%
Financial and Insurance Services	241	0%
Rental, Hiring and Real Estate Services	19,261	10%
Professional, Scientific and Technical Services	6,207	3%
Administrative and Support Services	5,489	3%
Public Administration and Safety	1,859	1%
Education and Training	2,087	1%
Health Care and Social Assistance	2,336	1%
Arts and Recreation Services	12,652	6%
Other Services	22,085	11%
Inadequately described	446	0%
Not stated	0	0%
Residential	2,262	1%
Vacant GFA	7,741	4%
TOTAL FLOOR SPACE	202,166	100%
Vacant land	243,862	
Vacant land - being constructed	3,510	

Bangalow employment precinct

Location characteristics

The Bangalow employment precinct is a small industrial estate located 2km to the south of Bangalow town centre, fronting Bangalow Road. The estate is zoned IN1 – General Industrial and is approximately 2.7 hectares in total. While in close proximity to the Bangalow Town Centre, services generally relate to rural supplies, storage, warehousing and wholesale trade rather than traditional urban support services.

Key infrastructure is described below:

- Main access road to Pacific Motorway is along Lismore Road, Byron Street and Bangalow Road, which travels through the town centre.
- There is no designated pedestrian and cyclist paths within the precinct or connecting the precinct to surrounding areas.
- The employment precinct has no access to public transport
- The employment precinct is connected to water and sewer.

Figure 5-5: Bangalow employment precinct



Source: HillPDA 2018

Table 5-3: Bangalow employment precinct quick stats

Category	Bangalow employment precinct	Employment precincts in LGA	Precinct contribution to employment lands
Precinct size	52,433 sqm	718,435 sqm	7%
Total floor space	11,710 sqm	202,166 sqm	5.79%
Average lot size	2,900 sqm	2,000 sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-4.

Table 5-4: Bangalow employment precinct planning parameters

Planning control	Parameters
Land zoning	IN1 – General Industrial
Building height	9m
Floor space ratio	0.75:1
Bushfire prone land	Nil
Minimum lot size	1,000sqm
Strategic Agricultural Land	Yes
Heritage	Nil

Development applications

One development application has been granted approval within the estate, as per Table 5-5. The application proposes the construction of a single storey industrial building.

The proposed Rural Industries Food Precinct at 201 Lismore Road is adjacent to the precinct, on land zoned RU1. Concerns have been expressed the proposed development facilitates it could negatively impact on the existing Bangalow employment precinct if it permits industrial uses.

Table 5-5: Bangalow employment precinct development applications

Address	Project details	Status	Anticipated completion year
10 Dudgeons Lane	Proposed construction of a single storey industrial unit with mezzanine level.	Possible	Early 2018
201 Lismore Road	Development of a Rural Industries Food Precinct in stages comprising 3 x 5,000sqm rural (agricultural) industrial buildings that can be doubled in size to 10,000sq m in later stages, a 3,000sq m rural industry building, 3 rural industry buildings of 800sq m, plus, a 1,000sq m food excellence facility where local and regional agricultural produce can be prepared and presented to food purchasers such as overseas and domestic buyers as well as the general public. The proposal includes a restaurant/cafe takeaway food shop primarily catering for onsite employees and limited public visitor use.	Possible	2019

Floor space audit

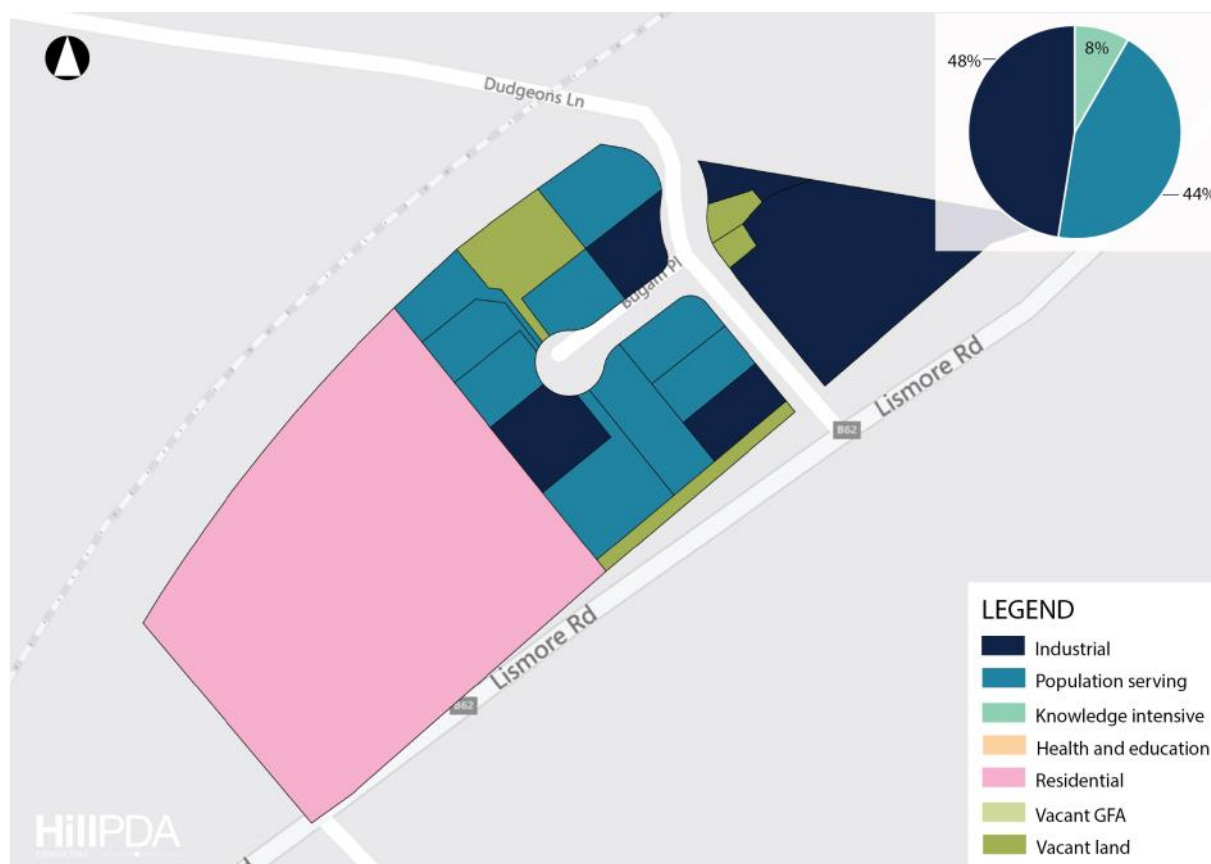
Table 5-6 indicates the floor space audit result which identified rental, hiring and real estate (25.2%) occupying the greatest proportion of floor space, followed by wholesale trade (24.4%). There was no vacant floor space in the employment precinct and approximately 2,403sqm of vacant land. There is also land to the west of the precinct currently zoned IN2. This land currently contains a residential house, however would be appropriate for industrial uses in the future, once the access arrangement challenges have been worked out.

Fifteen per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-6 identifies the distribution of land uses across the precinct.

Table 5-6: Bangalow employment precinct floor space audit

Industry	Floor space (sqm)	Floor space contribution (%)
Agriculture, Forestry and Fishing	789	7%
Manufacturing	1,904	16%
Construction	411	4%
Wholesale Trade	2,855	24%
Retail Trade	300	3%
Rental, Hiring and Real Estate Services	2,946	25%
Administrative and Support Services	979	8%
Arts and Recreation Services	300	3%
Other services	1,225	10%
Vacant GFA	0	0%
TOTAL FLOOR SPACE	11,710	100%
Vacant land	2,403	

Figure 5-6: Predominant existing floorspace use mix in Bangalow employment precinct*



Source: HillPDA *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
• Vacant land available within precinct and to the west of the precinct • Strong diversity of uses • Appropriate location to support rural services	• Minimum lot size planning controls restrict development on western site • Narrow roads (reduced further by parking) • Limited parking • Heavy vehicles required to pass through centre to access Pacific Motorway (safety concern) • Poor internet connectivity
Opportunities	Threats
• Capacity available to widen roads • Signage on frontage to further promote estate • Connection via reinstatement of the rail line • Significant parcel of land to the west of the site with capacity to accommodate future industrial uses	• Increased traffic congestion around the town centre would reduce efficiency of connection to M1 • Capacity to expand is limited reducing ability to cluster certain land uses and establish an identity • Possible increase in rents and land values if expansion to the west is not possible – this may require the relocation of some businesses to more affordable locations. • Confirming appropriate access arrangements for vacant/residential site to the west of the existing industrial precinct.

Business survey findings

No specific comments were made in relation to the Bangalow Employment Precinct.

Byron Arts and Industry employment precinct

Location characteristics

The Byron Arts and Industry employment precinct is the largest industrial estate in Byron LGA, comprising over 140 industrial premises (not including individual strata allotments). The precinct has a number of employment zonings, being IN2 General Industrial, B1 Neighbourhood Centre, B4 Mixed Use and B7 Business Park. Uses in the precinct are highly variable, including urban support services. Services support the strong tourist retail market with a number of retail outlets and internet businesses operating out of the precinct.

The precinct is located 4.5 kilometres to the west of Byron Bay town centre along one of the two entry corridors into the town. This close proximity to Byron Bay Town Centre and significant clustering of commercial, retail and industrial businesses in the precinct have contributed to the success of the precinct. The precinct experienced very strong land value increases (41% increase) over the past year, driven by strong demand, limited supply and very strong increases in rents (Valuers Australia, 2017). This growth has the capacity to “push out” lower revenue generating traditional industrial uses that are unable to respond to the increases in rent.

Key infrastructure in the precinct is summarised below:

- Ewingsdale Road is the main connector routes in and out of the precinct
- Public transport is available, however is limited
- Access to sewer and water is available.

Figure 5-7: Byron Arts and Industry employment precinct



Table 5-7: Byron Arts and Industry employment precinct quick stats

Category	Byron Arts and Industry employment precinct	Employment precincts in LGA	Precinct contribution to employment lands
Precinct size	396,601 sqm	718,435 sqm	38%
Total floor space	149,075 sqm	202,166 sqm	74%
Average lot size	2,900 sqm	2,000 sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-8.

Table 5-8: Byron Arts and Industry employment precinct planning parameters

Planning control	Parameters
Land zoning	B7 – Business Park IN2 – Light Industrial
Building height	9m
Floor space ratio	0.9:1
Bushfire prone land	Nil
Minimum lot size	1000sqm
Strategic Agricultural Land	Nil
Heritage	Nil

Development applications

Table 5-9 lists relevant development applications in this precinct. The estate currently has two approved development applications and another still under assessment. Notably all three propose caretakers dwellings as part of their application.

Table 5-9: Byron Arts and Industry employment precinct development applications

Address	Project details	Status	Anticipated completion year
15 Wollongbar Street	Four industrial units and a caretakers dwelling.	Approved, not yet built	2018
96-100 Centennial Circuit	Proposed construction of micro-brewery to include industrial retail outlet, administration offices, ancillary & caretakers dwelling. Associated car parking & landscaping.	Approved, not yet built	2019
88-94 Centennial Circuit	Construction of a 2 storey commercial & industrial development comprising a child care centre, 4 industrial retail outlets, 6 light industrial units, 2 food & drink outlets & a caretakers dwelling.	Still under assessment	2019

Floor space audit

As can be seen in Table 5-10, the floor space audit identified the following employment uses as occupying the greatest proportion of gross floor area: retail trade (20.8%); manufacturing (13.7%) and wholesale trade (12.1%). The precinct has a floor space vacancy rate of 4.7% and approximately 85,554sqm of vacant land

Fifteen per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-8 identifies the distribution of land uses across the precinct.

Table 5-10: Byron Arts and Industry employment precinct floor space audit

Industry	Floor space (sqm)	Floor space contribution (%)
Manufacturing	20,385	14%
Electricity, Gas, Water and Waste Services	60	0%
Construction	2,022	1%
Wholesale Trade	18,096	12%
Retail Trade	31,063	21%
Accommodation and Food Services	1,223	1%
Transport, Postal and Warehousing	12,630	8%
Information Media and Telecommunications	449	0%
Financial and Insurance Services	241	0%
Rental, Hiring and Real Estate Services	11,715	8%
Professional, Scientific and Technical Services	5,689	4%
Administrative and Support Services	4,184	3%
Public Administration and Safety	1,859	1%
Education and Training	1,402	1%
Health Care and Social Assistance	2,336	2%
Arts and Recreation Services	11,924	8%
Other Services	14,498	10%
Inadequately described	446	0%
Residential	1,862	1%
Vacant GFA	6,990	5%
TOTAL FLOOR SPACE	149075	100%
Vacant land	85,554	57%

Figure 5-8: Predominant existing floorspace use mix in Byron arts and industry employment precinct*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong identity - Mixture and synergy between some of the uses - Proximity to Sunrise shopping centre - Some large ownership parcels - Large Council owned parcels - Reinstatement of the rail line - Located on main road between Byron TC and Pacific Hwy - Ewingsdale Rd is being upgraded - Access to Pacific Hwy in both directions - Growing creative cluster	- Entry and egress points at capacity causing safety and congestion issues - Limited parking - Narrow streets (worsened by on-street parking) creating conflicts and pinch-points for trucks - Changing nature of the precinct from a traditional industrial precinct to a mixed use employment area - High land values - Fragmented ownership - Safety issues for pedestrian and cyclists in precinct - Poor internet connectivity - The two drains on either side of the depot site must be maintained as effluent easements
Opportunities	Threats
- Additional capacity within vacant sites - Opportunity to transition into a mixed use employment precinct - Opportunity to intensify development on sites to meet FSR and height provision - Long term opportunity to relocate the depot, but a small depot to service Byron Bay at the rear of the site is to remain - Additional capacity on the Council depot land	- Residential and short term accommodation uses within precinct - Land use conflicts - Encroachment of non-permissible uses (i.e. cafes, mainstream retailing) inflating land values and changing the objective of IN2 zone - New roundabouts potentially restricting turning circles for trucks - Additional retail uses moving into centre may alter the hierarchy of centres across Byron - Need to protect traditional industrial uses if want to maintain industrial intent of precinct - Long term traffic congestion issues (Ewingsdale Road), particularly when the newly rezoned unrelated residential precinct nearby is developed, could impact on businesses due to reduced accessibility - Extent of potential contaminants on Council depot site is undetermined

Business survey findings

The findings from the business survey (see Table 5-11) identified a number of specific ideas, needs, challenges or opportunities to support the Byron Arts and Industry employment precinct. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-11: Byron Arts and Industry employment precinct business survey summary

Theme	Survey results	Application to Strategy
Internet	Importance of having improved internet access. Access to fast internet was cited as a key challenge for business.	Poor internet connectivity is a LGA wide constraint and cannot be directly addressed through the Strategy
Roads, traffic and transport	- Comments ranged from suggesting improvements to traffic arrangements in the Estate, improving footpaths in the Estate, public transport improvements to the introduction of cycling infrastructure and road widenings. - Specifically, the expansion of bike courier deliveries was raised as something that should be supported by Council. - Ewingsdale Road was cited as being a constraint on	- Traffic congestion has the capacity to significantly stifle the function of the existing centres and employment lands in and around Byron Bay. If West Byron Bay comes online without adequate traffic solutions in place, it may seriously jeopardise the performance of the Arts and Industry precinct. - Enhanced quality transport, and streetscape amenity would support business and contribute

	existing business in the area and that its upgrade would help alleviate impacts of congestion on businesses.	to the success of the precinct.
Parking	Limited supply of parking and time restrictions.	Sufficient parking is necessary to accommodate visitors and staff and deliveries.
Planning	- A respondent supported the Estate evolving into a retail hub while other comments cited the need for flexibility in the planning provisions in the areas so that small businesses can innovate. - Additional permitted uses such as health and medical	Allowing additional permitted uses that do not align with the objectives of the relevant zone are discouraged as it would detract from the intent of the zone and impact on availability of land for existing uses (e.g. industrial).
Accommodation	- The topic of accommodation attracted a number of responses. Respondents discussed the need to ensure that local workers can live locally, through the provision of affordable housing, which could be funded through taxing holiday house operations. - Deficiency in professional accommodation options for work related travel.	The issue of affordable housing provision in Byron has been mentioned on a number of occasions through feedback and has been acknowledged, however the study would be unable to make recommendations on this topic.
Postal services	Need for improvements to postal services.	Poor postal/courier services are generally, a LGA wide constraint and cannot be directly addressed through the Strategy.
Childcare	Shortage in child care places and the impact this has on their ability to return to work.	The issue of accessible child care provision in Byron is a LGA wide constraint and cannot be directly addressed through the Strategy.

West Byron Urban Release

Location characteristics

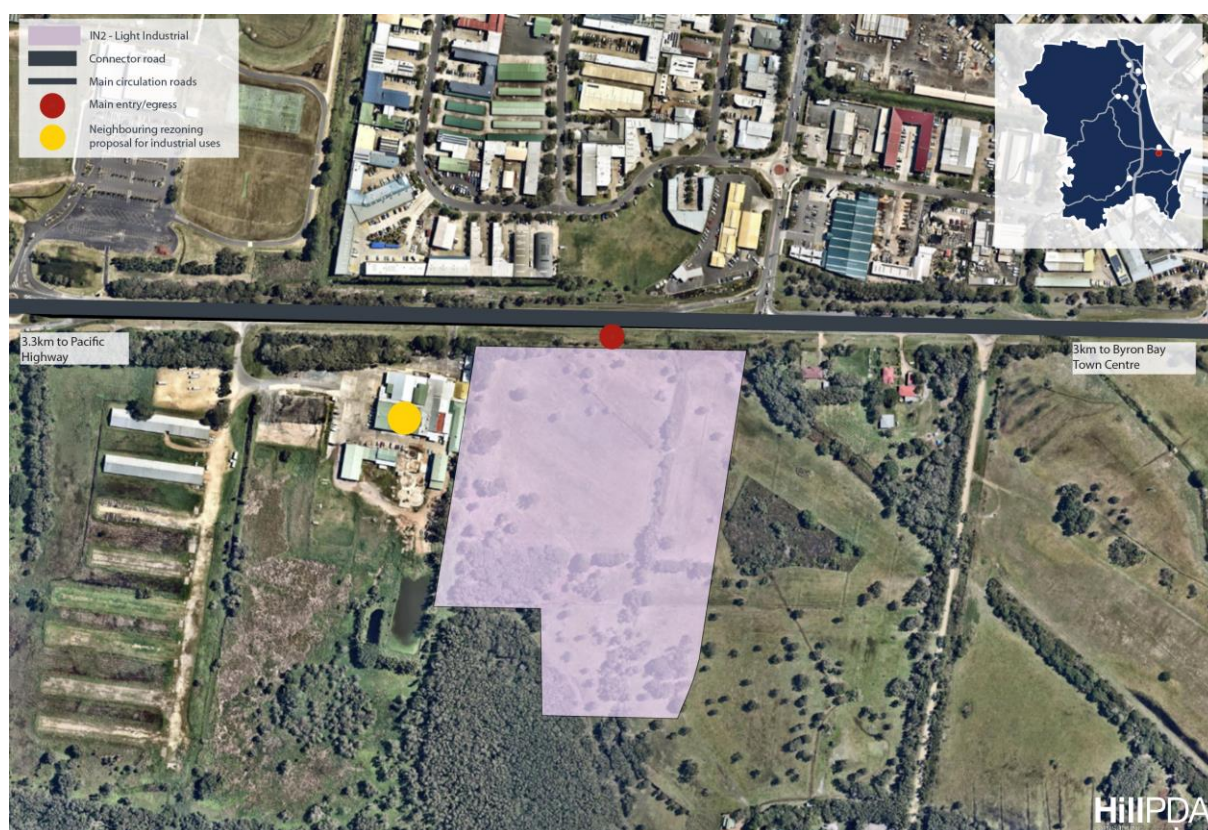
West Byron Urban Release area is located on the southern side of Ewingsdale Road, opposite the Byron Arts and Industry employment precinct. The area consists of 7.5 hectares of IN2 – Light Industrial land and 1.1 hectares of B1 – Neighbourhood Centre land. The precinct is yet to be developed. It will be accompanied by low and medium density residential once developed.

The precinct is located 4.5 kilometres to the west of Byron Bay town centre along one of the two entry corridors into the town. The area is known for recent strong land value increases (41% increase) over the past year driven by strong demand, limited supply and very strong increases in rents (Valuers Australia, 2017).

Key infrastructure in the precinct is summarised below:

- Ewingsdale Road is the main connector routes in and out of the precinct.
- Public transport is available, however is limited
- Access to sewer and water is not available.

Figure 5-9: West Byron Urban Release employment precinct



Source: HillPDA 2018

Table 5-12: West Byron Urban Release employment precinct quick stats

Category	West Byron employment precinct	Employment precincts in LGA	Precinct contribution to employment lands
Precinct size	75,000sqm	718,435	10%

Planning parameters

Planning parameters relevant to the employment precinct are identified in Table 5-13.

Table 5-13: West Byron planning parameters

Planning control	Parameters
Land zoning	IN2 – Light Industrial and B1 – Neighbourhood Centre
Building height	9m
Floor space ratio	Unzoned
Bushfire prone land	B1 – Neighbourhood Zone affected
Minimum lot size	450sqm (IN2), 200sqm(B1)
Strategic Agricultural Land	Nil
Heritage	Nil

Development applications

A proposal for a site adjacent to the West Byron Urban Release employment precinct is currently subject to a rezoning application. A development application for new employment uses was also recently approved on this site. This has not been included as part of this precinct and the proposed floorspace has not been counted in the audit. 268 Ewingsdale Road Byron Bay (DA 10.2017.337.1) was approved (17 November 2017) for the redevelopment of land zoned RU2 – Rural Landscape. This includes change of use from the existing chicken processing plant to new employment uses including:

- Agricultural Processing Industry
- Transport Depot
- Recreation Facility
- Warehouse or Distribution Centre
- 'Byron Bay Business Park'

There will be access upgrades between the site and Ewingsdale Road as specified in the approval.

While the site is currently zoned RU2 – Rural Landscape, a gateway determination was issued in February 2017 recommending its rezoning to IN2 – Light Industrial.

Floor space audit

The site is currently undeveloped.

S.W.O.T. Analysis

Strengths	Weaknesses
- Proximity to existing Industry and Arts precinct, clustering benefits. - Some large ownership parcels - Located on main road between Byron TC and Pacific Hwy - Ewingsdale Rd is being upgraded - Access to Pacific Hwy in both directions	- Ewingsdale Road already operating at or near capacity, particularly at Arts and Industry Precinct, adjacent to the West Byron release area - Potential future conflicts between residential and industrial uses - Safety issues for pedestrian and cyclists in precinct
Opportunities	Threats
- Well located land ready for redevelopment. - Part of new precinct which will have a significant residential population.	Long term traffic congestion issues (Ewingsdale Road), particularly when the newly rezoned residential precinct is developed, could impact on businesses due to reduced accessibility

Business survey findings

No specific comments were made in relation to this precinct.

Mullumbimby employment precinct

Location characteristics

Mullumbimby employment precinct is located just to the east of Mullumbimby Town Centre and provides 11.8 hectares of IN1 General Industrial zoned land. The Mullumbimby employment precinct contains some vacant land which was recently subdivided with one parcel now being developed.

Key infrastructure is summarised below:

- There is no available public transport but is fifteen minutes' walk from Mullumbimby town centre.
- 7 minutes' drive from Pacific Motorway interchange
- Access to sewer and water available.

Table 5-14: Mullumbimby employment precinct quick stats

Category	Mullumbimby employment precinct	Employment precincts in LGA	Precinct contribution to employment lands
Precinct size	107,498 sqm	718,435 sqm	15%
Total floor space	15,474 sqm	202,166 sqm	8%
Average lot size	2,900 sqm	2,000 sqm	N/A

Planning parameters

Planning parameters relevant to the employment precinct are identified in Table 5-15.

Table 5-15: Mullumbimby employment precinct planning parameters

Planning control	Parameters
Land zoning	IN1 – General Industrial
Building height	9m
Floor space ratio	0.8:1
Bushfire prone land	Partially affected
Minimum lot size	1000sqm
Strategic Agricultural Land	Partially affected
Heritage	Nil

Development applications

There are two approved applications located within the IN1 General industrial Estate (see Table 5-16). Both are anticipated to be built in the next year or two.

Table 5-16: Mullumbimby employment precinct development applications

Address	Project details	Status	Anticipated completion year
Towers Drive	Proposed construction of storage building.	Approved	2018
Towers Drive	Proposed construction of light industrial development to comprise 6 units.	Approved	2019

Floor space audit

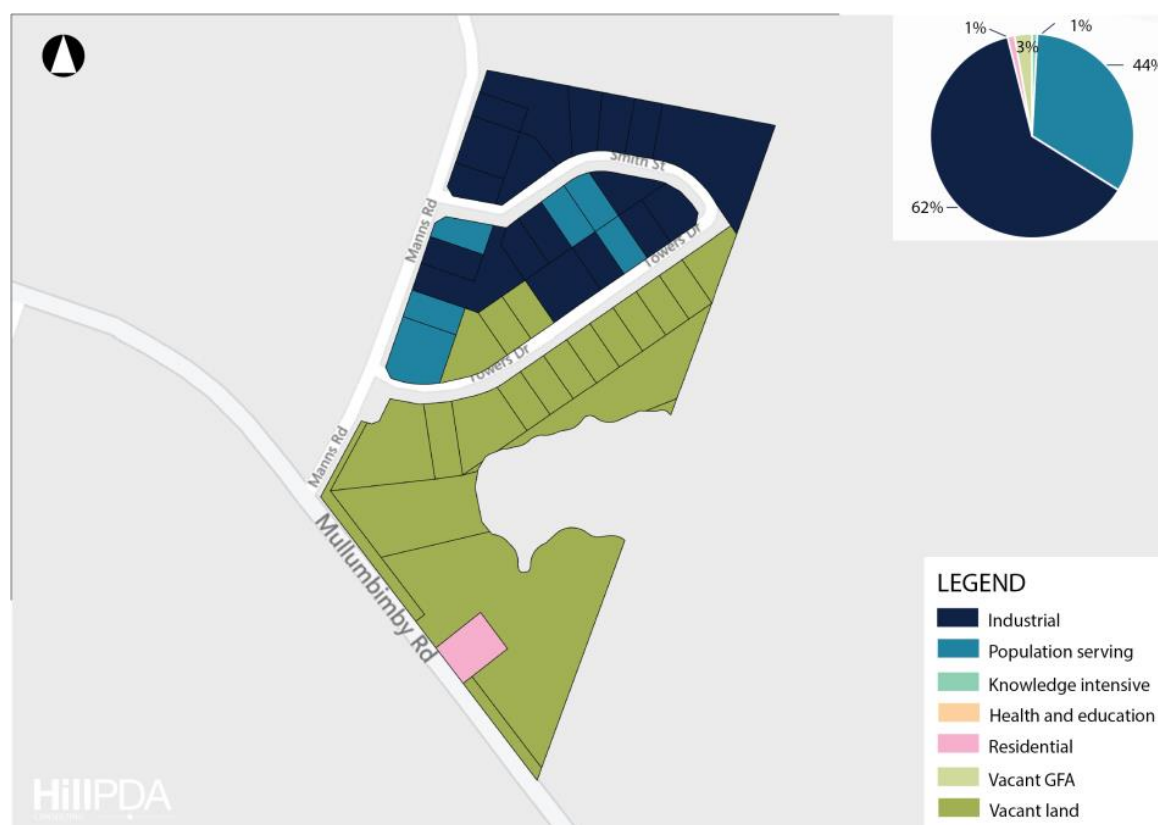
As can be seen in Table 5-17 the floor space audit identified the following employment uses as occupying the greatest proportion of gross floor area: transport, postal and warehousing (27.3%); other services (18.7%) and manufacturing (18.4%). The precinct has a vacancy rate of 2.5% and has approximately 57,929sqm of vacant land.

Ten per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-10 identifies the distribution of land uses across the precinct.

Table 5-17: Mullumbimby employment precinct floor space audit

Industry	Floor space (sqm)	Floor space contribution (%)
Manufacturing	2,841	18%
Construction	1,657	11%
Wholesale Trade	2,544	16%
Retail Trade	280	2%
Accommodation and Food Services	130	1%
Transport, Postal and Warehousing	4,223	27%
Information Media and Telecommunications	150	1%
Arts and Recreation Services	170	1%
Other Services	2,889	19%
Residential	200	1%
Vacant GFA	390	3%
TOTAL FLOOR SPACE	15,474	100%
Vacant land	57,929	
Vacant land - being constructed	3,510	

Figure 5-10: Predominant existing floorspace use mix in Mullumbimby employment precinct*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
• Strong uptake in new industrial development • Proximity to Mullumbimby town centre • No surrounding land use conflicts • Some dominant land owners • Connection streets to Pacific Motorway do not pass through residential neighbourhoods • Access to Pacific Hwy in both directions • Operating in line with intended zone objective	• Limited expansion opportunity on surrounding land due to land zoning and minimum lot subdivision provisions • Poor internet connectivity • Expansion limited due to flooding and strategic agricultural land • No direct highway access • Flood prone land and acid sulfate soil affectations
Opportunities	Threats
• Additional capacity within vacant sites • Increased connection to Mullumbimby town centre • Rising of surrounding land to mitigate flooding issues and expand precinct	• Road connections may be cut off during flood events

Business survey findings

No specific comments were made in relation to Mullumbimby employment precinct.

Ross Industrial (Mill Street) employment precinct

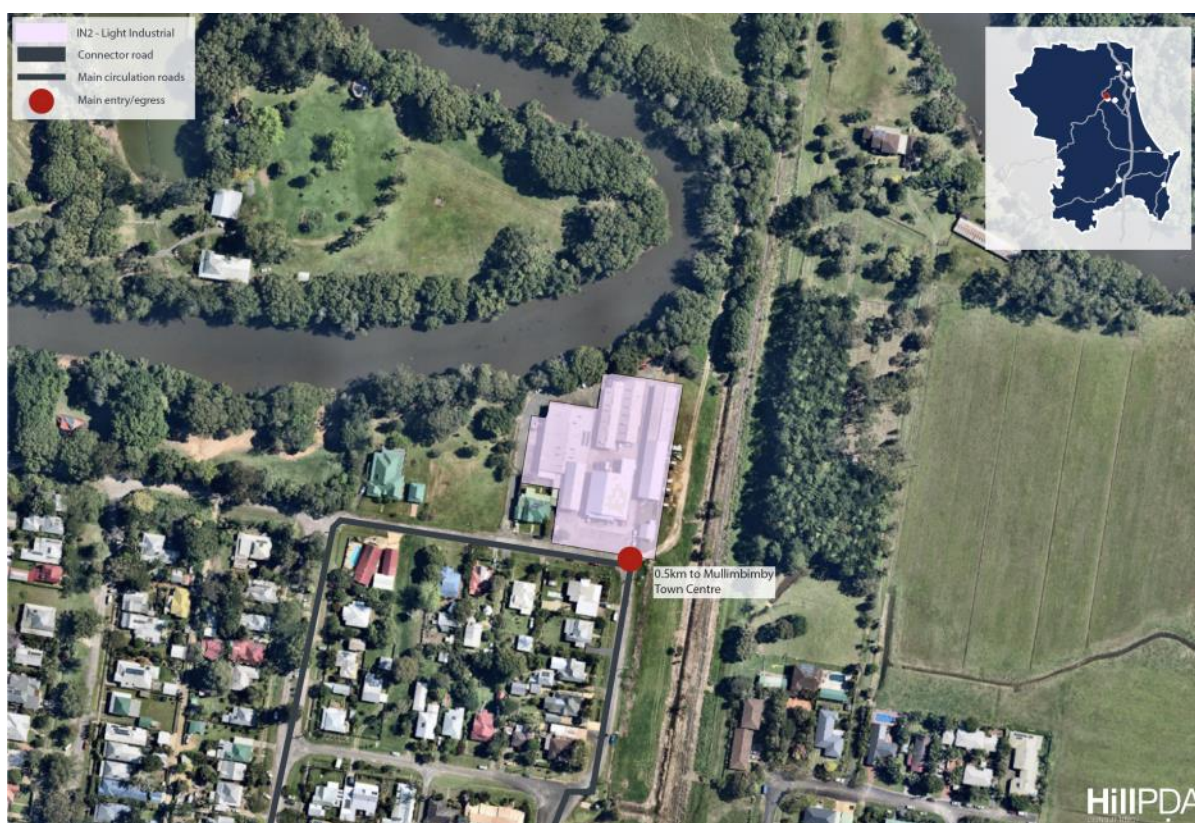
Location characteristics

An industrial estate, located just to the north of Mullumbimby Town Centre, along Mill Street. Ross Industrial Estate (Mill Street) provides 0.6 hectares of industrial zoned land and contains no vacant land.

Key infrastructure in the precincts is summarised below:

- The Mill Street precinct is located on the edge of the Mullumbimby town centre and is serviced by water and sewer
- There is limited to no public transport in both locations
- Vehicular access is poor.

Figure 5-11: Ross Industrial Estate employment precinct



Source: HillPDA

Table 5-18: Mill Street employment precinct quick stats

Category	Ross Industrial employment precinct	Employment precincts in LGA	Precinct contribution to employment lands
Precinct size	6,244sqm	718,435 sqm	1%
Total floor space	3,206sqm	202,166sqm	2%
Average lot size	2,900sqm	2,000 sqm	N/A

Planning parameters

Planning parameters relevant to the employment precinct are identified in Table 5-19.

Table 5-19: Ross Industrial employment precinct planning parameters

Planning control	Parameters
Land zoning	IN1 – General Industrial
Building height	9m
Floor space ratio	0.8:1
Bushfire prone land	Partially affected
Minimum lot size	1000sqm
Strategic Agricultural Land	Partially affected
Heritage	Nil

Development applications

There are no significant commercial development applications at present.

Floor space audit

The floor space audit, summarised in Table 5-20, identified the following employment uses as occupying the greatest proportion of gross floor area: wholesale trade (32.8%); manufacturing (31.4%) and information media and telecommunications (13.5%). There is no vacant floor space or vacant land in the precinct.

Thirty-two per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-12 identifies the distribution of land uses across the precinct.

Table 5-20: Ross Industrial employment precinct floor space audit

Industry	Floor space (sqm)	Floor space contribution (%)
Manufacturing	1,006	31%
Wholesale Trade	1,050	33%
Information Media and Telecommunications	434	14%
Rental, Hiring and Real Estate Services	200	6%
Administrative and Support Services	172	5%
Arts and Recreation Services	258	8%
Other Services	86	3%
Vacant GFA	0	0%
TOTAL FLOOR SPACE	3,206	100%
Vacant land	0	0%

Figure 5-12: Predominant existing floorspace use mix in Ross Industrial employment precinct *



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Proximity to Mullumbimby town centre - Consolidated ownership - Operating in line with intended zone objective	- Limited expansion opportunity on surrounding land due to land zoning, flooding and railway line - Poor internet connectivity - No direct highway access - Access roads pass through residential areas - Flood prone land and acid sulfate soil affectations
Opportunities	Threats
- Opportunities for alternative employment uses if current uses become redundant. - This could leverage off the strong heritage character of the precinct and attractive location adjacent to the river	Land use conflicts

Business survey findings

No specific comments were made in relation to Ross Industrial Estate.

Billinudgel employment precinct

Location characteristics

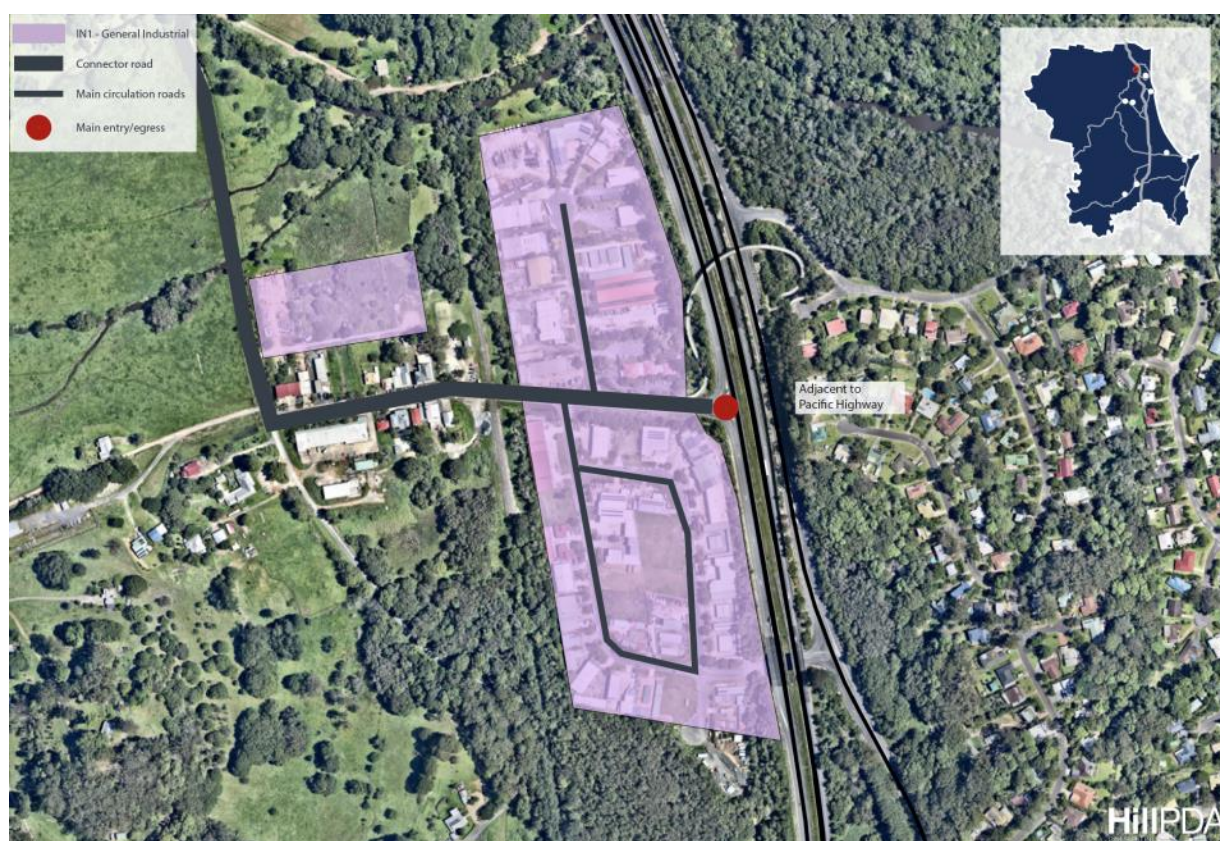
Billinudgel Industrial Estate is located along the Pacific Motorway to the north west of Ocean Shores.

The Estate provides approximately 11 hectares of IN1 General Industrial zoned land and contains a range of storage, warehousing, retail, urban support and other industrial businesses.

Key infrastructure is summarised below:

- Located adjacent to Pacific Motorway
- Public transport is available (intercity bus services), however is limited.
- Access to sewer and water is available.

Figure 5-13: Billinudgel employment precinct



Source: HillPDA 2018

Table 5-21: Billinudgel employment precinct quick stats

Category	Billinudgel employment precinct	Employment precincts in LGA	Precinct contribution to employment lands
Precinct size	80,658 sqm	718,435 sqm	11%
Total floor space	22,702 sqm	202,166 sqm	11%
Average lot size	2,900 sqm	2,000 sqm	N/A

Planning parameters

Planning parameters relevant to the employment precinct are identified in Table 5-22.

Table 5-22: Billinudgel employment precinct planning parameters

Planning control	Parameters
Land zoning	IN1 – General Industrial
Building height	9m
Floor space ratio	0.8:1
Bushfire prone land	Partially affected
Minimum lot size	1000sqm
Strategic Agricultural Land	Partially affected
Heritage	Partially affected

Development applications

Two development applications (see Table 5-23) have recently been approved in the estate.

Table 5-23: Billinudgel employment precinct development applications

Address	Project details	Status	Anticipated completion year
15 Bonanza Drive	Construction of 2 storey commercial building to include office, storage & caretakers dwelling.	Approved – Contract Let	2018
11 Bonanza Drive	Construction of single storey industrial building with 4 industrial units and caretaker unit.	Approved.	2019

Floor space audit

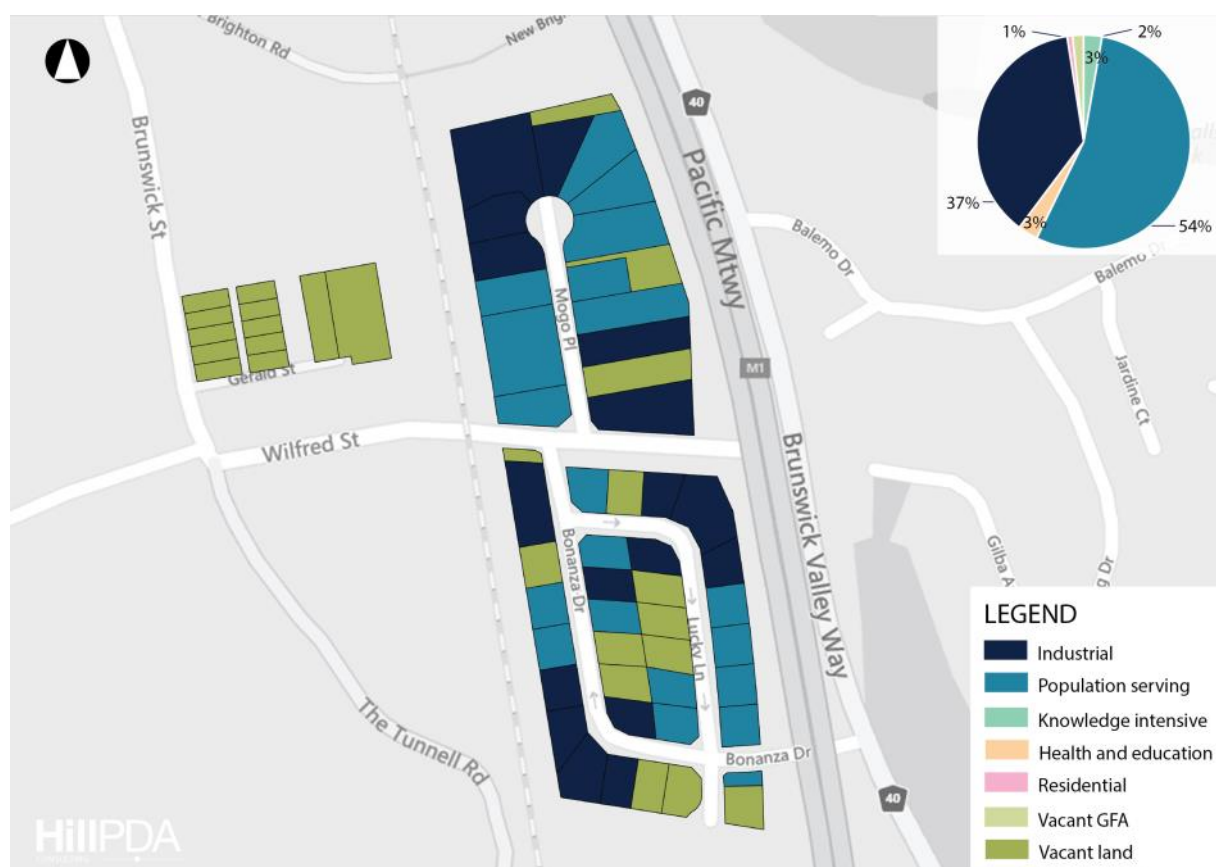
The floor space audit, summarised in Table 5-24, identified the following employment uses as occupying the greatest proportion of gross floor area: rental, hiring and real estate services; manufacturing (each 19.4%) and other services (14.9%). The precinct has 22,976sqm of vacant land and a vacancy rate of 1.6%.

Four per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-14 identifies the distribution of land uses across the precinct.

Table 5-24: Billinudgel employment precinct floor space audit

Industry	Floor space (sqm)	Floor space contribution (%)
Manufacturing	4,394	19%
Construction	1,807	8%
Wholesale Trade	3,118	14%
Retail Trade	2,638	12%
Accommodation and Food Services	118	1%
Transport, Postal and Warehousing	922	4%
Rental, Hiring and Real Estate Services	4,400	19%
Professional, Scientific and Technical Services	518	2%
Administrative and Support Services	154	1%
Education and Training	685	3%
Other Services	3,387	15%
Residential	200	1%
Vacant GFA	361	2%
TOTAL FLOOR SPACE	22,702	100%
Vacant land	22,976	

Figure 5-14: Predominant existing floorspace use mix in Billinudgel employment precinct*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong industrial and urban support service precinct - Proximity to Pacific Motorway - Direct north-bound ingress and egress to Pacific Motorway - No surrounding land use conflicts - Childcare near centre - Good pedestrian and road access to residential estate on eastern side of highway	- No direct M1 access south - Slow internet speeds - Limited designated parking - Proportion of vacant land only 0.4 FSR - Flood and bushfire prone land, acid sulfate soil affectations
Opportunities	Threats
- Vacant land available - Opportunity to implement flood mitigations to further increase appeal and capacity of centre - Reinstatement or repurpose of rail	- Significantly flood prone, could deter businesses from locating. - Residential uses are emerging in centre

Business survey findings

No specific comments were made in relation to Billinudgel Industrial.

5.2 Business centres overview

Distributed across the LGA, Byron's business centres comprise a range of retail, commercial, community and accommodation uses and services that support the local population and contribute to the broader economy. The centre's range in size and scale. Uses within the precincts can be categorised as outlined in Table 5-25.

LAND AREA

Zoned land **54 hectares**

Total vacant land **11 hectares**

Average lot size **1,060 sqm**

GROSS FLOOR AREA

Total GFA **240,286 sqm**

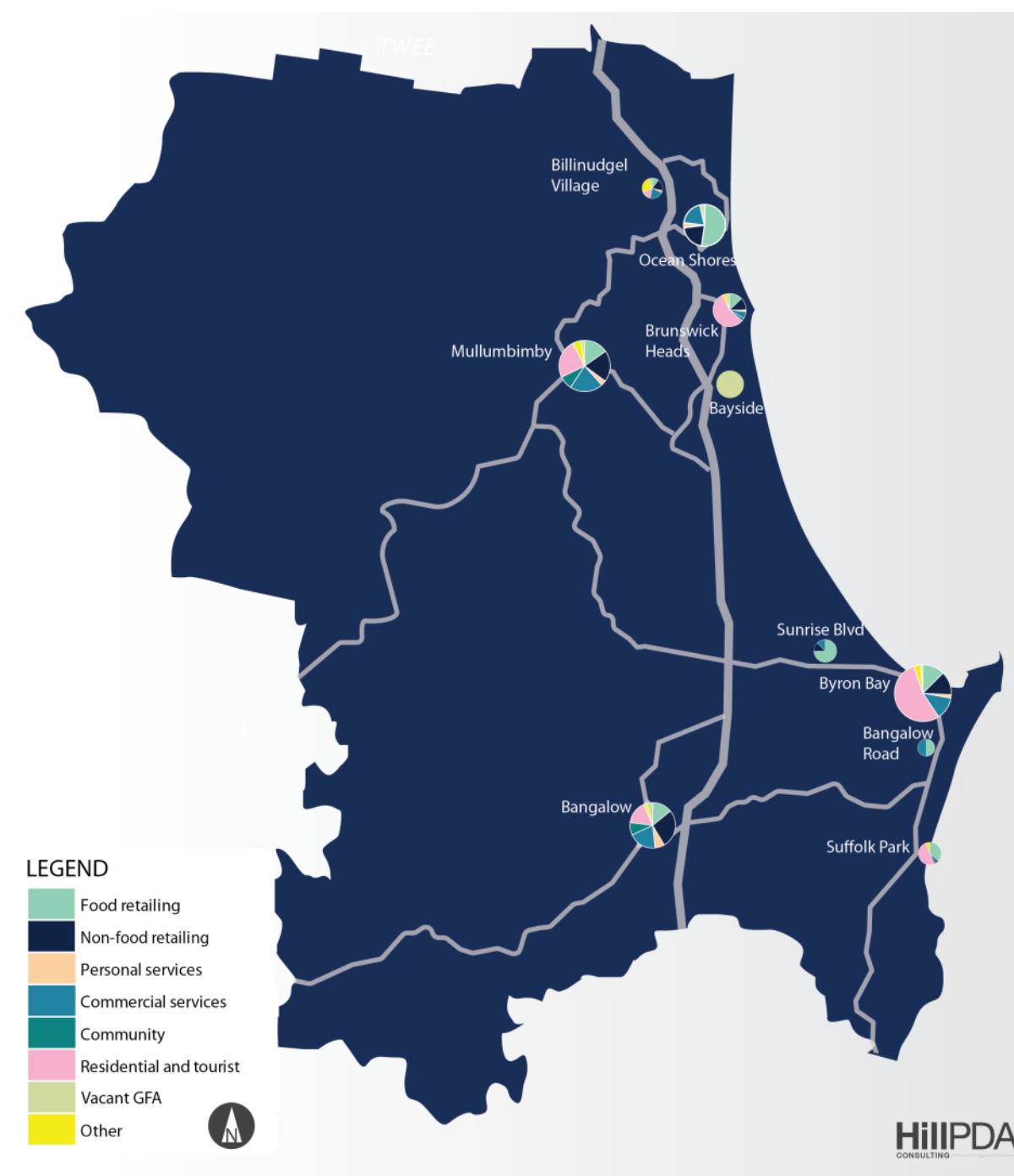
Vacant GFA **4,503 sqm**

Table 5-25: Broad business centre categories

BROAD USE CATEGORY	GROUP TERMS	USE TYPE CLASSIFICATION
Food retailing 	Supermarkets and grocery stores Take-away, liquor stores and speciality food Restaurants and cafes	Convenience store Supermarket Speciality food Take away food Cafes and restaurants
Non-food retailing 	Bulky good stores Clothing stores Speciality non-food stores Other specialities	Bulky goods Sport/Camping equipment Wholesale/Homemaker Fabric and soft goods Furniture retailing Domestic Hardware/Houseware Other bulky goods Clothing Department store Discount department store Speciality non-food Specialities Mini Major Service Station Convenience
Personal services 	Selected personal services	Personal services
Commercial services 	Office and speciality services	Finance General Government Legal Medical Real Estate Travel
Community 	Community	Community Education
Accommodation and entertainment	Residential Accommodation/entertainment	Residential Entertainment, Hotel Recreation and fitness
Other	Other	Automotive Other type/Unknown Utility

There are eight existing business centres in the Byron LGA and one centre identified for future release (Bayside). There is an additional local centre that would be released as part of the West Byron expansion area, however this is still subject to subdivision. Byron Bay Town Centre, Mullumbimby Town Centre and Bangalow Town Centre are the main business centres, contributing the greatest diversity of floor area. Figure 5-15 and Table 5-26 illustrate the spatial distribution and broad use categories of each centre.

Figure 5-15: Spatial distribution of business centres



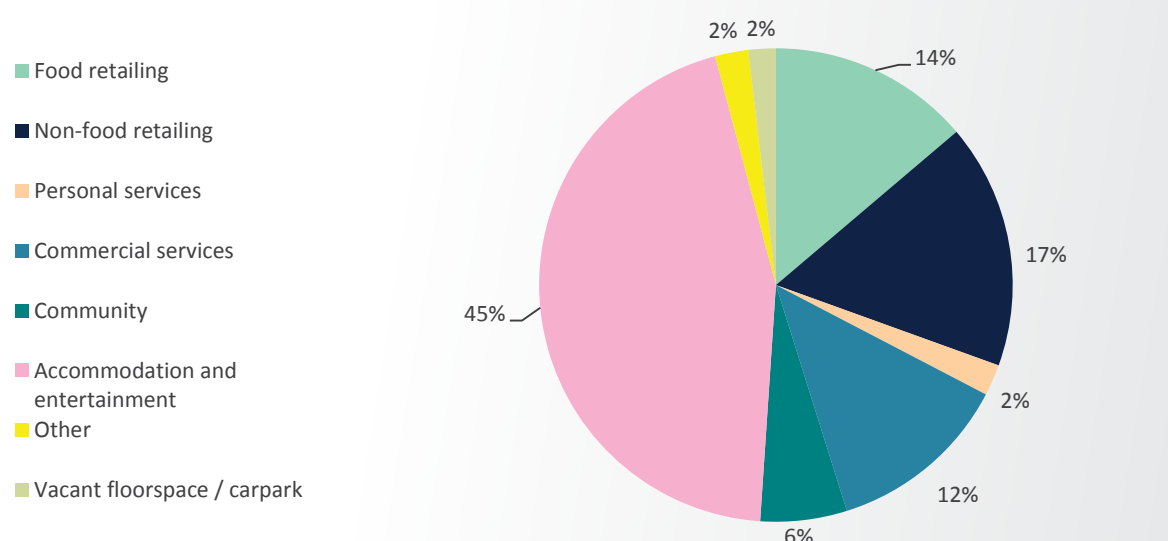
Source: HillPDA 2018

Table 5-26: Business centre overview

Centres	Land use zone	Broad use category	Top 3 group term uses
Bangalow Town Centre	B2 – Local Centre	Non-food retailing	Office and speciality services Clothing stores Community
Suffolk Park Centre	B1 – Neighbourhood Centre	Accommodation and entertainment	Accommodation/entertainment Supermarkets and grocery stores Take-away, liquor stores and speciality food
Byron Bay Town Centre	B2 – Local Centre B4 – Mixed Use	Accommodation and entertainment	Accommodation/entertainment Office and speciality services Clothing stores
Sunrise Boulevard Centre	B1 – Neighbourhood Centre	Food retailing	Supermarkets and grocery stores Take-away, liquor stores and speciality
Brunswick Heads Town Centre	B2 – Local Centre B4 – Mixed Use	Accommodation and entertainment	Residential Accommodation/entertainment Office and speciality services
Bayside Brunswick Heads Centre	B1 – Neighbourhood Centre	Vacant	Vacant
Ocean Shores Centre	B2 – Local Centre	Non-food retailing	Speciality non-food stores Supermarkets and grocery stores Office and speciality services
Mullumbimby Town Centre	B2 – Local Centre B4 – Mixed Use	Accommodation and entertainment	Office and speciality services Accommodation/entertainment Residential
Billinudgel Village Centre	RU5 - Village	Other	Other Office and speciality services Speciality non-food stores

The gross floor area of Byron's business centres is predominantly oriented Accommodation and entertainment uses. Food retailing and non-food retailing are also take-up greater quantities of floor area. Considering Byron LGA is an attractive tourist destination, these results are expected. In most instances residential and accommodation uses are located above ground floor retailing. Figure 5-16 identifies the distribution of total gross floor area of all employment precincts across the broad industry categories.

Figure 5-16: Business centres GFA distribution across broader industry categories



The overall breakdown of floor space across specific industry types can be found in Table 5-27. The contribution of each industry to the overall employment precinct GFA is also identified. Retail trade, manufacturing and wholesale trade comprised the most floor area.

ACCOMMODATION & ENTERTAINMENT



29%

RESIDENTIAL



16%

OFFICE & SPECIALITY SERVICES



13%

Table 5-27: Business centre industry floor space breakdown

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	13,569	6%
Take-away liquor stores and specialty food	6,067	3%
Specialty non-food stores	14,223	6%
Restaurants and cafes	13,523	6%
Clothing stores	16,876	7%
Bulky goods stores	7,815	3%
Selected personal services	5,120	2%
Other specialities	1,251	1%
Office and speciality services (i.e. legal, medical)	30,054	13%
Community	14,197	6%
Other	5,439	2%
Accommodation/entertainment(incl. hotel/pub)	68,076	29%
Residential	38,264	16%
Vacant floor space	4,503	2%
TOTAL FLOOR SPACE	238,977	100%
Vacant land	109,855	

Bangalow Town Centre

Location characteristics

Bangalow Town Centre is a hinterland retail centre fronting Byron Street. The centre is zoned B2 Local Centre and is situated approximately 20 minutes north of the Ballina Byron Gateway Airport and 20 minute drive south west of Byron Bay Town Centre. Access to the town is via Bangalow Road from the east, Lismore Road from the West and Granuaille Road from the north.

The centre services both locals and visitors, with its unique heritage buildings and variety of speciality stores, cafes and restaurants attracting tourists. A small supermarket, newsagency, post office and medical practice provide essential services for surrounding residents. The centre is also evolving into a creative arts and cultural precinct with an expanding presence of entrepreneurial businesses and a strong local brand and product identity.

There is evidence of the centre spreading with some commercial uses located west of the centre on Lismore Road.

Key infrastructure considerations are:

- The centre is serviced by bus route 641, which offers limited services on school days and weekends
- Parking time limit charges were introduced on the 1st January 2018 - now operating from 9am – 6pm seven days a week at the cost of \$4 per hour
- The town is connected to water and sewer.

Figure 5-17: Bangalow town centre



Source: HillPDA 2018

Table 5-28: Bangalow town centre quick stats

Category	Bangalow town centre	Centres in LGA	Precinct contribution to centres
Precinct size	31,294sqm	542,697sqm	6%
Total floor space	11,893sqm	240,286sqm	5%
Average lot size	570sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-29.

Table 5-29: Bangalow town centre planning parameters

Planning control	Parameters
Land zoning	B2 – Local Centre
Building height	9 metres
Floor space ratio	1:1
Bushfire prone land	Nil
Minimum lot size	200sqm
Strategic Agricultural Land	Yes
Heritage	Conservation Area – General – Bangalow

Development applications

There is currently one development application lodged within the B2 Local centre as per Table 5-30. There is sufficient demand in the centre to accommodate the uptake of this additional proposal.

Table 5-30: Bangalow town centre development applications

Address	Project details	Status	Anticipated completion year
9 Station Street, Bangalow	Proposed construction of a mixed use development to comprise 6 shop-top housing dwellings and commercial premises for 3 tenancies (for use as shop, restaurant or cafe or office premises).	Under assessment	2019

Floorspace audit

Table 5-31 indicates the floorspace audit results. Floorspace identified as office and speciality services (19.6%) occupies the greatest proportion of floor space, followed by clothing stores (11.5%), community (8.9%) and accommodation and entertainment (8.6%). The vacancy rate in the centre was low (4.2%) and limited land was available for further expansion (1,861sqm).

Seventeen per cent of properties in the precinct incorporated some form of sustainability element (e.g. solar panels, rain water tank) Figure 5-18 identifies the distribution of land uses across the precinct.

Table 5-31: Bangalow town centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	460	4%
Take-away liquor stores and specialty food	577	5%
Specialty non-food stores	841	7%
Restaurants and cafes	675	6%
Clothing stores	1,373	12%
Bulky goods stores	866	7%
Selected personal services	834	7%
Other specialities	160	1%
Office and speciality services (i.e. legal, medical)	2,332	20%
Community	1,055	9%
Other	274	2%
Accommodation/entertainment(incl. hotel/pub)	1,017	9%
Residential	935	8%
Vacant floor space	495	4%
TOTAL FLOOR SPACE	11,893	100%
Vacant land	1,861	

Figure 5-18: Predominant existing floorspace use mix in Bangalow Town centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong centre identity – particularly as an emerging creative arts and boutique retail precinct - Healthy vacancy rate - Strong heritage/village character in building typology along Byron Street - Destination centre and tourist attractor	- Limited public transport services - Limited vacancy may push up rents - Slow internet and limited mobile service - Limited vacant land for development resulting in out of centre retail/commercial (i.e. Lismore Rd) - Heavy vehicle passing along Byron St - Limited loading zones
Opportunities	Threats
- Increase public transport connectivity - Repurpose or reinstate old rail line as a passenger transport solution connecting to Byron. Line would integrate with active transport pathway connections and opportunities to improve pedestrian flows - Enhance active transport connections - Leverage potential new growth area at on Bangalow Road (near Pacific Motorway)	- The introduction of paid parking may deter passing trade - High rents pushing out creative art and cultural businesses that reinforce centres unique identity - An increase in the intensity of uses at the Bangalow Industrial estate may result in more heavy vehicles passing through centre.

Business survey findings

The findings from the business survey, detailed in Table 5-32, identified a number of specific ideas, needs, challenges or opportunities to support the Bangalow town centre. These have been categorised into themes, with relevance and application to the Employment Lands Strategy identified.

Table 5-32: Bangalow town centre business survey summary

Theme	Survey results	Application to Strategy
Internet	Internet and mobile coverage is poor and presents operational challenges for businesses	Poor internet connectivity has been identified as a LGA wide constraint. However this cannot be directly addressed through the Strategy
Transport and parking	- Road conditions are poor - Public transport is limited - Southbound Bangalow exit on M1 should be considered - Reinstate rail line as a light rail service for locals and tourists - No paid parking/parking metres	Enhanced quality transport and road connections to Bangalow would support business and potentially enable the centre to grow
Uses	- More affordable office space required - More accommodation and motels in Bangalow - Protect the village feel - Need for affordable warehousing space - Invest in arts infrastructure – subsidised rental for creative industries	- Consider the expansion of the centre to facilitate more opportunity for commercial premises – specifically office and creative suites - More short-term accommodation options could be supported, limited to locations that would support the commercial function of the centre and would not weaken current active street frontages, so not to detract or compete with commercial uses.

Byron Bay town centre

Location characteristics

Byron Bay town centre is the largest commercial centre within Byron LGA. Combined, the B2 Local Centre and B4 Mixed Use zones provide 20 hectares of commercial land. The B2 zone is bound by Bay Street to the north, the railway line to the west, Middleton Lane to the east and Browning Street to the south. A smaller area of B4 zoned land lies to the north along Lawson Street and Gilmore Crescent.

The town centre provides a wide range of retail and commercial services for the surrounding residents and visitors to Byron. A number of accommodation premises are also located within the town centre, enhancing the diversity of uses and densities within the centre.

Key infrastructure considerations are:

- Ewingsdale Road and Bangalow Road are the main connector routes in and out of the centre
- Public transport is available, however is limited
- Access to sewer and water is available.

Figure 5-19: Byron Bay Town Centre



Source: HillPDA 2018

Table 5-33: Byron Bay town centre quick stats

Category	Byron Bay town centre	Centres in LGA	Precinct contribution to centres
Precinct size	202,589 sqm	542,697sqm	37%
Total floor space	118,563 sqm	240,286sqm	49%
Average lot size	570sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-34.

Table 5-34: Byron Bay town centre planning parameters

Planning control	Parameters
Land zoning	B2- Local Centre B4 – Mixed Use
Building height	9m-11.5m
Floor space ratio	0.4/0.6 – 1.3
Bushfire prone land	Partial
Minimum lot size	B2 (200sqm) B4 (600sqm)
Strategic Agricultural Land	Nil
Heritage	Heritage Items and Heritage Conservation Areas

Development applications

Byron Bay town centre (refer to Table 5-35) has two development applications under assessment and two under construction. Notably, one of these developments under construction includes a 3,800sqm supermarket.

Table 5-35: Byron Bay town centre development applications

Address	Project details	Status	Anticipated completion year
4 Marvell Street	Proposed demolition of the existing building. Construction of a 3 storey motel including a restaurant, bar and shops.	Under assessment	2019
112-114 Jonson Street	Removal/demolition of existing commercial building. Construction of 2 storey shopping centre. To include 3,800sqm supermarket on ground floor with specialty shops above.	Under Construction	2018
137-139 Jonson Street & 3 Browning Street	Mixed use development comprising commercial premises, cafe, child care centre, shop top housing and serviced apartments.	Currently before JRPP	2020
7 Marvell Street	Demolition of existing structures. Construction of 2 storey tourist accommodation with 14 motel units and shop.	Under construction.	2019

A large proportion of development in the pipeline in the employment zones is located in the Byron Bay town centre, highlighting the centre's importance as a retail and accommodation hub. The retail and accommodation industries are large employment industries in the Byron LGA.

Floor space audit

Table 5-36 shows the floor space audit result and identifies accommodation and entertainment uses (which can also include hotel/pub uses), as the employment use occupying the greatest proportion of gross floor area in Byron Bay Town Centre (44.4%), followed by clothing stores (10%) and office and speciality services (i.e. legal, medical) (9.5%).

The precinct has a floor space vacancy rate of 0.8% and approximately 30,038 sqm of vacant land.

One per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-20 identifies the distribution of land uses across the precinct.

Table 5-36: Byron Bay town centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	3,712	3%
Take-away liquor stores and specialty food	1,101	1%
Specialty non-food stores	3,162	3%
Restaurants and cafes	6,809	6%
Clothing stores	11,892	10%
Bulky goods stores	1,243	1%
Selected personal services	1,739	1%
Office and speciality services (i.e. legal, medical)	-	0%
Other	11,248	9%
Accommodation/entertainment(incl. hotel/pub)	7,179	6%
Residential	2,132	2%
Vacant floor space	52,649	44%
TOTAL FLOOR SPACE	118,626	100%
Vacant land	30,038	

Figure 5-20: Predominant existing floorspace use mix in Byron Bay Town Centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong surrounding residential catchment to support centre - Strong tourism sector and associated workforce - Strong anchor tenants such as Woolworths and Aldi. - Restaurant and café stream strong with restaurants and pubs - Strong night time economy - Centre links well with beach	- Fragmented ownership - Seasonal variances in trade - Limited vacant land for redevelopment - Traffic congestion on roads within and entering and exiting town - On-street parking is limited (although demand may be seasonal) - Potential B4 vacant land is Crown Land, with more barriers to purchase and redevelopment - Residential and accommodation in town centre may reduce redevelopment potential because of higher acquisition costs - Poor internet connectivity - Partially flood prone and affected by a high water table, partially on bushfire prone land and partially acid sulfate soils affected.
Opportunities	Threats
- Opportunity to further expand centre on B4 zoned and east of Byron Bay Skate Park - Further capacity in centre to develop to meet planning controls and intensify uses - Other longer term expansion opportunities on periphery of centre through mixed use outcomes (i.e. council car park)	- Competition for land from tourist accommodation - Increased land values/rent reducing affordability and pushing out smaller retailers - Some instances of antisocial behaviour - Community perception that B4 zoned crown land should remain as public space/bushland - Retail and commercial development(s) along Bayshore Dr (B4 mixed use zone)

Business survey findings

The findings from the business survey, as shown in Table 5-37, identified a number of specific ideas, needs, challenges or opportunities to support the Byron Bay town centre. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-37: Byron Bay town centre business survey summary

Theme	Survey results	Relevance to strategy
Connectivity	Growing need for fast internet. Roll out of NBN will not service all areas.	Growing demand for more shared office spaces with fast internet connectivity.
Transport	- Road congestion is having an impact on businesses due to travel time. - Improvements to public transport between towns in the LGA - Cannot sustain development at West Byron Bay - Improve active and public transport connections	Traffic congestion was identified as having the capacity to significantly stifle the function of the existing centres and employment lands in and around Byron Bay. Business operators indicated that if West Byron Bay comes online, without adequate traffic solutions in place, it may jeopardise the performance of the Arts and Industry precinct.
Town centre design/parking	- No paid parking, respondents reported a negative impact on sales when it was implemented - Encourage bicycles in the centre	The introduction of paid parking may impact on business visitation and potentially push less viable businesses out of the centre if revenue drops.
Planning	- Use planning provisions to encourage supply of office space - Implementation of Byron Master Plan and CBD by-pass	Consider demand for more office supply

Sunrise Boulevard centre

Location characteristics

Sunrise Boulevard centre comprises of:

- Byron West Shopping Fair - anchored by a Supa IGA and liquor store. It is zoned B1 – Neighbourhood Centre and is located to the north of the Byron Arts and Industry employment precinct.
- ‘Habitat’ – a mixed-use business hub currently under construction. It combines live and work, commercial office, retail and cafe spaces. It is located on land zoned B4 – Mixed Use.

Key infrastructure considerations are:

- Upon completion, the ‘Habitat’ development will have access to the NBN¹⁹
- Bayshore Drive connects the precinct to Ewingsdale Road via the Industrial precinct.
- Public transport is available, however is limited
- Access to sewer and water is available.

Figure 5-21: Sunrise Boulevard Centre



Source: HillPDA 2018 * Deferred Matter zone not included

¹⁹ <http://www.habitatbyronbay.com/features-facilities/>

Table 5-38: Sunrise Boulevard centre quick stats

Category	Sunrise Boulevard centre	Centres in LGA	Precinct contribution to centres
Precinct size	80,220 sqm	542,697sqm	15%
Total floor space	3,820 sqm	240,286sqm	2%
Average lot size	570 sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the employment precinct are identified in Table 5-39.

Table 5-39: Sunrise Boulevard centre planning parameters

Planning control	Parameters
Land zoning	B1 – Neighbourhood Centre
Building height	9m
Floor space ratio	0.5:1
Bushfire prone land	Nil
Minimum lot size	400sqm
Strategic Agricultural Land	Nil
Heritage	Nil

Development applications

There was only one development proposal identified in Sunrise Boulevard centre as per Table 5-40.

Table 5-40: Sunrise Boulevard centre development applications

Development	Description	Year completion	Status
Bayshore Dr, The Habitat	Construction of mixed use development with 28 residential units, commercial and retail tenancies. Retail (1,389sqm) and commercial space of 2018 around 2,020sqm.		Under construction

Source: Cordell Connect 2018

Floor space audit

The floor space audit, summarised in Table 5-41, identified the following employment uses as occupying the greatest proportion of gross floor area: Supermarkets and grocery stores (45%), restaurants and cafes (26%) and take-away liquor and speciality food (10%). There is no vacant floor space in the precinct however there is approximately 66,401sqm of vacant land.

No properties in the precinct incorporated a sustainability element. Figure 5-22 identifies the distribution of land uses across the precinct.

Table 5-41: Sunrise Boulevard centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	1,700	45%
Take-away liquor stores and specialty food	383	10%
Specialty non-food stores	377	10%
Restaurants and cafes	983	26%
Clothing stores	0	0%
Bulky goods stores	0	0%
Selected personal services	0	0%
Office and speciality services (i.e. legal, medical)	0	0%
Other	377	10%
Accommodation/entertainment(incl. hotel/pub)	0	0%
Residential	0	0%

Category	Floor space (sqm)	Floor space contribution (%)
Vacant floor space	0	0%
TOTAL FLOOR SPACE	3,820	100%
Vacant land (or land under construction)	66,401	0%

Figure 5-22: Predominant existing floorspace use mix in Sunrise Boulevard Centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Good anchor tenants (liquor shop and supermarket) - Strong surrounding catchment with both residential and employment - B4 mixed use has attracted strong developer and occupier interest - Reinstatement of the rail line (shuttle service to Byron Bay)	- Congestion on Bayshore Drive, particularly existing through industrial estate - Limited expansion opportunities as likely reached feasible development potential
Opportunities	Threats
Increased trade catchment if West Byron is developed	- Proximity to Byron Bay town centre - Any new retail development in B4 zone may threaten the viability of the Sunrise retail centre

Business survey findings

No specific comments were made in relation to Sunrise Boulevard.

Suffolk Park centre

Location characteristics

Suffolk Park centre is situated on the coast, approximately three kilometres south of Byron Bay town centre. Suffolk Park is a small neighbourhood centre providing basic services to the surrounding community and visitor accommodation. The centre is anchored by a small SPAR supermarket and The Park Hotel.

Key infrastructure considerations are:

- A bus stop located opposite the centre on Clifford Street, servicing routes 637B (Byron Bay to Byron Hills via Suffolk Park) and 640 (Byron Bay)
- Sewer and water infrastructure
- Internet connection but anecdotal evidence indicates the connection is slow (Business survey findings, 2017-18).

Figure 5-23: Suffolk Park Centre



Source: HillPDA 2018

Table 5-42: Suffolk Park centre quick stats

Category	Suffolk Park centre	Centres in LGA	Precinct contribution to centres
Precinct size	9,367sqm	542,697sqm	2%
Total floor space	2,922sqm	240,286sqm	1%
Average lot size	570sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the employment precinct are identified in Table 5-43.

Table 5-43: Suffolk Park centre planning parameters

Planning control	Parameters
Land zoning	B1 – Neighbourhood Centre
Building height	9m
Floor space ratio	0.5:1
Bushfire prone land	Affected
Minimum lot size	400sqm
Strategic Agricultural Land	Nil
Heritage	Nil

Development applications

There are currently no developments proposed within Suffolk Park which include retail or commercial floor space.

Floor space audit

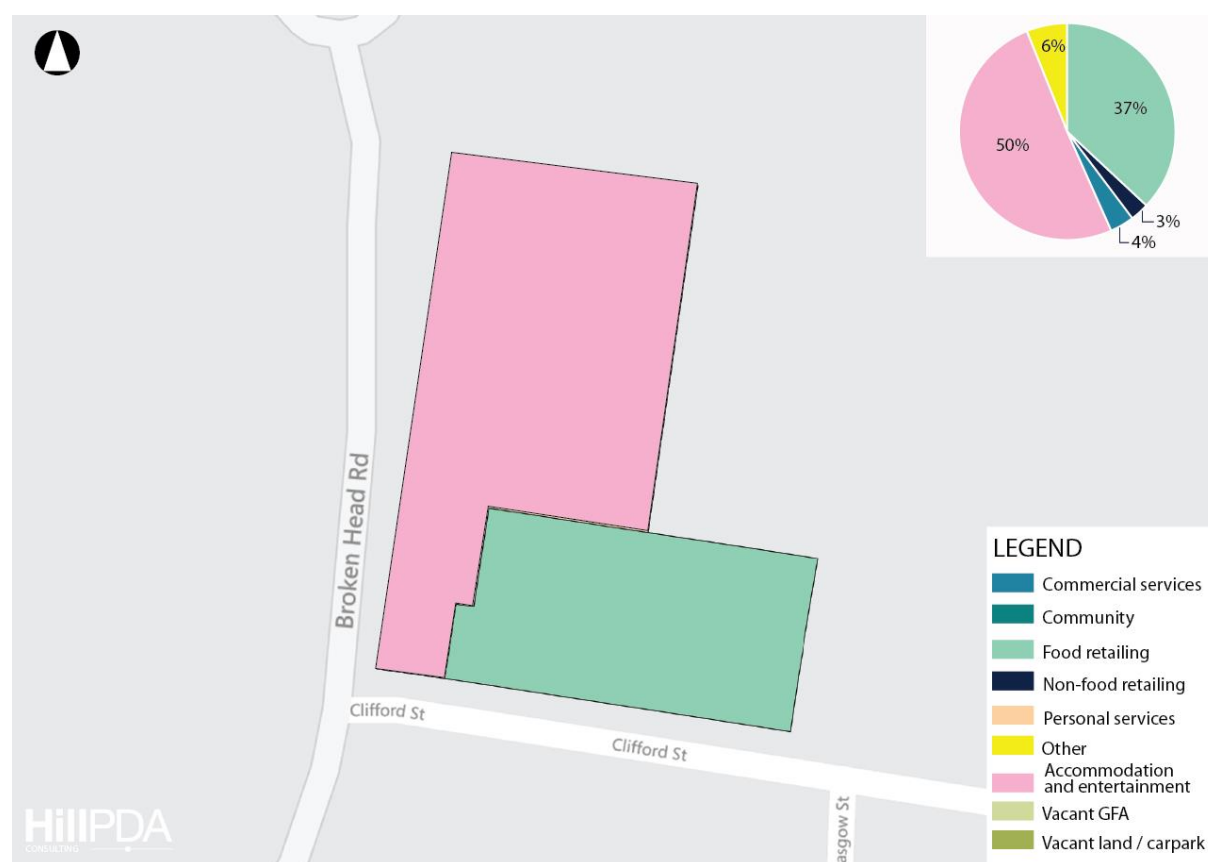
Table 5-44 shows the floor space audit result which identified accommodation (including hotel/pub) (50.5%), supermarkets and grocery stores (17.1%) and take-away liquor stores and speciality food (12.4%) as having the greatest proportion of gross floor area. There was no vacant floor space in the employment precinct and no vacant land.

Six per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-24 identifies the distribution of land uses across the precinct.

Table 5-44: Suffolk Park centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	500	17%
Take-away liquor stores and specialty food	362	12%
Specialty non-food stores	77	3%
Restaurants and cafes	224	8%
Office and speciality services (i.e. legal, medical)	111	4%
Other	171	6%
Accommodation/entertainment(incl. hotel/pub)	1,477	51%
Vacant floor space	0	0%
TOTAL FLOOR SPACE	2,922	100%
Vacant land	0	

Figure 5-24: Predominant existing floorspace use mix in Suffolk Park Centre*



Source: HillPDA, 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Diversity of uses on site, servicing the local catchment - Fronts a main road connecting Byron and Ballina, good exposure to passing traffic - Pub and SPAR supermarket act as anchors for centre - Adequate car parking	- Limited opportunity for expansion without further rezoning - Significant trade leakage towards Byron Centre - Already reached maximum development potential under planning controls (0.5 FSR) - Poor internet connectivity - Acid sulfate soil affectation, bushfire prone land and flood prone land
Opportunities	Threats
- Opportunity to expand centre onto Council's adjoining property (currently a Deferred Matter) - Increase permissible FSR to allow for development intensification	Proximity to Byron Town Centre and associate trade leakage and competition

Business survey findings

The findings from the business survey (Table 5-45) identified a number of specific ideas, needs, challenges or opportunities to support the Suffolk Park centre. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-45: Suffolk Park centre business survey summary

Theme	Survey results	Application to Strategy
Local business and connectivity	- Promote local trades and suppliers - Council should source local trades and suppliers from inside the LGA - Need faster internet.	Promotes the viability and sustainability of local businesses
Roads	Establish a link road between Suffolk and the Byron Arts and Industry employment precinct, bypassing Byron town centre.	The need for improved connections can be identified as an ancillary recommendation of the strategy.
Shared hub/business centre	- More affordable shared office space - Shared office spaces hub that can be hired out on a per day basis. - Need for more appropriately sized and affordable conference spaces and 'collaborative spaces' to hire.	Demand for affordable office space, which suggests a shortage in supply and potential need for rezoning.

Mullumbimby town centre

Location characteristics

Mullumbimby town centre is the second largest retail and commercial centre within Byron LGA, located a 24 minute drive north of Byron Bay. Combined, the B2 Local Centre and B4 Mixed Use zones provide 10 hectares of employment zoned land.

The town centre provides a range of retail and commercial services for the surrounding residents and visitors and is the home of Council's administrative centre and Council Chambers. A Woolworths Supermarket lies to the north east of the town centre.

Key infrastructure considerations are:

- Mullumbimby Road and Gulgah Road connect the centre to the Pacific Motorway.
- Public transport is available, however is limited
- Access to sewer and water is available
- Key civic buildings (e.g. Library, Council) are located in the centre.

Figure 5-25: Mullumbimby town centre



Source: HillPDA 2018

Table 5-46: Mullumbimby town centre quick stats

Category	Mullumbimby town centre	Centres in LGA	Precinct contribution to centres
Precinct size	101,719 sqm	542,697sqm	19%
Total floor space	50,981 sqm	240,286sqm	21%
Average lot size	570 sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-47.

Table 5-47: Mullumbimby town centre planning parameters

Planning control	Parameters
Land zoning	B2 – Local Centre B4 – Mixed Use
Building height	9m
Floor space ratio	0.6:1(B4) 0.8:1(B2)
Bushfire prone land	Nil
Minimum lot size	200sqm
Strategic Agricultural Land	Yes
Heritage	Heritage Conservation Area and Heritage Items

Development applications

There are no significant commercial development applications at present.

Floor space audit

The floor space audit, as summarised in Table 5-48, identified the following employment uses as occupying the greatest proportion of gross floor area: commercial (21.3%); accommodation (13.8%) and community (9.6%). The precinct has a vacancy rate of 2.1% and has approximately 4,581sqm of vacant land.

Six per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-26 identifies the distribution of land uses across the precinct.

Table 5-48: Mullumbimby town centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	4,489	9%
Take-away liquor stores and specialty food	1,389	3%
Specialty non-food stores	4,537	9%
Restaurants and cafes	1,302	3%
Clothing stores	1,566	3%
Bulky goods stores	4,402	9%
Selected personal services	1,388	3%
Other specialities	610	1%
Office and speciality services (i.e. legal, medical)	10,837	21%
Community	4,907	10%
Other	1,943	4%
Accommodation/entertainment(incl. hotel/pub)	7,027	14%
Residential	5,494	11%
Vacant floor space	1,088	2%
TOTAL FLOOR SPACE	50,981	100%
Vacant land	4,581	

Figure 5-26: Predominant existing floorspace use mix in Mullumbimby Town Centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong surrounding residential catchment to support centre - Strong anchor tenants such as Woolworths and Council - Restaurant and café uses strong - Parking availability - Heritage character of Burringbar Street.	- Fragmented ownership - Proximity to Ocean Shores which may draw away some trade - Limited vacant land for redevelopment - Proximity from Pacific Motorway - Poor internet connectivity - Main supermarket not integrated with rest of centre - Heritage conservation zone - Flood prone and acid sulfate soil affectations.
Opportunities	Threats
- Growing tourism sector - Further capacity in centre to develop to meet planning controls and intensify uses - Leverage potential new residential growth areas in the northern part of the Shire - Possibly increase planning controls to enable redevelopment and densification of centre - Opportunity to expand B2 on northern edge up to Tincogan Street	Increased land values/rent reducing affordability and pushing out smaller retailers/services

Business survey findings

The findings from the business survey, as summarised in Table 5-49, identified a number of specific ideas, needs, challenges or opportunities to support the Mullumbimby town centre. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-49: Mullumbimby town centre business survey summary

Theme	Survey results	Application to Strategy
Utilities	- Need for upgraded internet infrastructure. - Improvements to reliability of electricity network required.	Poor internet connectivity is a LGA wide constraint and cannot be directly addressed through the Strategy
Commercial space	- Greater supply of commercial space tailored to small businesses - Small warehousing suitable for micro-businesses - Creation of live/work creative industry hub arrangements - Opportunity for warehousing/distribution in the LGA	Anecdotal demand for affordable and flexible commercial and warehousing space which needs to be considered as part of the strategy.
Transport	- Improvements to road infrastructure required, a key consideration by one respondent in relation to whether to remain in the LGA. - Cycling routes linking the Byron centre	- Active and passive transport improvements, including the upgrade of walking/cycling track amenities has the potential to further encourage tourism to the area. - Traffic congestion has the capacity to significantly stifle the function of the existing centres and employment lands in and around Byron Bay. If West Byron Bay comes online without adequate traffic solutions in place, it may seriously jeopardise the performance of the Arts and Industry precinct.
Housing	- Respondent raised housing as an issue affecting business as they work from home; hence their ability to locate their business in the LGA is based on being able to afford to have a house in the LGA. - Delivering affordable housing	The issue of affordable housing provision in Byron has been mentioned on a number of occasions through feedback and has been acknowledged, however the study would be unable to make recommendations on this topic.
Planning	- Simplified DA process, particularly for smaller projects. - Clear planning guidelines in relation to short term rental accommodation and home-office based businesses	Anecdotal demand for simpler and clearer processes for minor development applications for employment uses which needs to be considered as part of the strategy.
Parking	No paid parking	The introduction of paid parking may impact on business visitation and potentially push less viable businesses out of the centre if revenue drops.

Brunswick Heads town centre

Location characteristics

Brunswick Heads is located at the mouth of the Brunswick River. The centre comprises 6.9 hectares of land zoned B2 Local Centre and B4 Mixed Use. The B2 zoning provides a range of retail and commercial services that cater to the local population needs as well as visitors to the area. The mixed use zone is focused along the main street of Tweed Street and provides a range of retail, motel, commercial and highway support services.

The popular Hotel Brunswick is located in the centre, along with a range of speciality shops, restaurants and cafes. An IGA supermarket is situated on Tweed Street.

The area is popular with holiday makers, as evidenced by the range of accommodation services including holiday apartments, motels and a campsite.

Key infrastructure considerations are:

- Approximately 30 minutes to Gold Coast and Ballina Airports.
- Approximately 1km from Pacific Motorway. Main Connection North to Gold Coast (1 hour) and South to major centres like Byron Bay (20 mins) and Ballina (30 mins).
- Public transport is available, however is limited
- Access to sewer and water is available.

Figure 5-27: Brunswick Heads Town centre



Source: HillPDA 2018

Table 5-50: Brunswick Heads town centre quick stats

Category	Brunswick Heads town centre	Centres in LGA	Precinct contribution to centres
Precinct size	68,629sqm	542,697sqm	13%
Total floor space	39,349sqm	240,286sqm	16%
Average lot size	570 sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-51.

Table 5-51: Brunswick Heads town centre planning parameters

Planning control	Parameters
Land zoning	B2 – Local Centre B4 – Mixed Use
Building height	9 metres
Floor space ratio	0.8:1 (Local centre) 0.5:1 (Mixed use)
Bushfire prone land	Nil
Minimum lot size	200sqm (Local centre) 600sqm (Mixed use)
Strategic Agricultural Land	Nil
Heritage	Yes – individual heritage items

Development applications

There was only one development application identified in Brunswick Heads as per Table 5-52, which was approved a number of years ago, yet construction has not commenced. It is not clear whether this project will proceed.

Table 5-52: Brunswick Heads town centre development applications

Address	Project details	Status	Anticipated completion year
25 Fingal Street	Removal/demolition of existing dwelling. Construction of 2 storey mixed use building with 2 retail tenancies on ground floor & 2 x 1 bedroom & 1 x 3 bedroom units.	Approved but construction not commenced	N/A

Floor space audit

As can be seen in Table 5-53, the floor space audit identified the following employment uses as occupying the greatest proportion of gross floor area: accommodation and entertainment (14.5%), office and speciality service (7.3%), and restaurants and cafes (6.2%). The audit identified a large proportion of residential floor space in the centre (45.8%), which aligns with observations in the land use zone review. There is a floor space vacancy rate of 3.7% and limited vacant land remaining (346sqm).

No properties in the precinct incorporated a sustainability element. Figure 5-28 identifies the distribution of land uses across the precinct.

Table 5-53: Brunswick Heads town centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	369	1%
Take-away liquor stores and specialty food	1,599	4%
Specialty non-food stores	1,588	4%
Restaurants and cafes	2,427	6%
Clothing stores	1,903	5%
Bulky goods stores	1,056	3%
Selected personal services	767	2%
Other specialities	481	1%
Office and speciality services (i.e. legal, medical)	2,886	7%
Community	1,056	3%
Other	52	0%
Accommodation/entertainment(incl. hotel/pub)	5,722	15%
Residential	18,003	46%
Vacant floor space	1,438	4%
TOTAL FLOOR SPACE	39,349	100%
Vacant land	346	

Figure 5-28: Predominant existing floorspace use mix in Brunswick Heads Town Centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong visitor and tourism opportunity - Centre has strong fundamentals, well located in close proximity to natural assets - open space, water ways and beach	- Proximity to Ocean Shores and Mullumbimby town centre - Low surrounding resident population - Residential uses located within centre - Fragmented ownerships - Limited large parcels of land - Seasonal trade - BWS and IGA located outside of commercial core - Dispersed centre - Limited passing trade - No strong anchor tenant - High vacancy rate (10%) - High water table could impact on development potential. - Limited demand and opportunity for town to expand – waterway to the north and east and nature reserve western side.
Opportunities	Threats
- Potential to increase tourism - Consolidate town centre into identifiable core - Increase residential densities on periphery of town centre to support trade - Increased trade capture from future population within Saddle Rd estate - Possible commercial/lifestyle precinct around the boat harbour - Better integrate anchor tenants	- Retail and commercial activity directed towards Ocean Shores and Byron Town Centre - Residential uses limiting redevelopment opportunity and reducing clustering of employment uses.

Business survey findings

The findings from the business survey, summarised in Table 5-54, identified a number of specific ideas, needs, challenges or opportunities to support the Brunswick Heads town centre. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-54: Brunswick Heads town centre business survey summary

Theme	Survey results	Application to Strategy
Parking	Business concern about paid parking, as it may push visitors away.	The introduction of paid parking may impact on business visitation and potentially push less viable businesses out of the centre if revenue drops.
Internet	Need for upgraded internet infrastructure.	Poor internet connectivity is a LGA wide constraint and cannot be directly addressed through the Strategy
Transport	- Development of bicycle ways interlinking the community - Bike/walking track along the Brunswick River between Mullumbimby and Brunswick Heads. - Public transport link to Varsity Lakes train station and Southern Cross University Gold Coast campus	Active and passive transport improvements, including the upgrade of walking/cycling track amenities has the potential to further encourage tourism to the area.

Ocean Shores centre

Location characteristics

Ocean Shores is located directly north of Brunswick Heads, approximately 19km north of Byron Bay Town Centre. The Ocean Shores Retail Centre provides approximately 2.7 hectares of land zoned B2 - Local Centre.

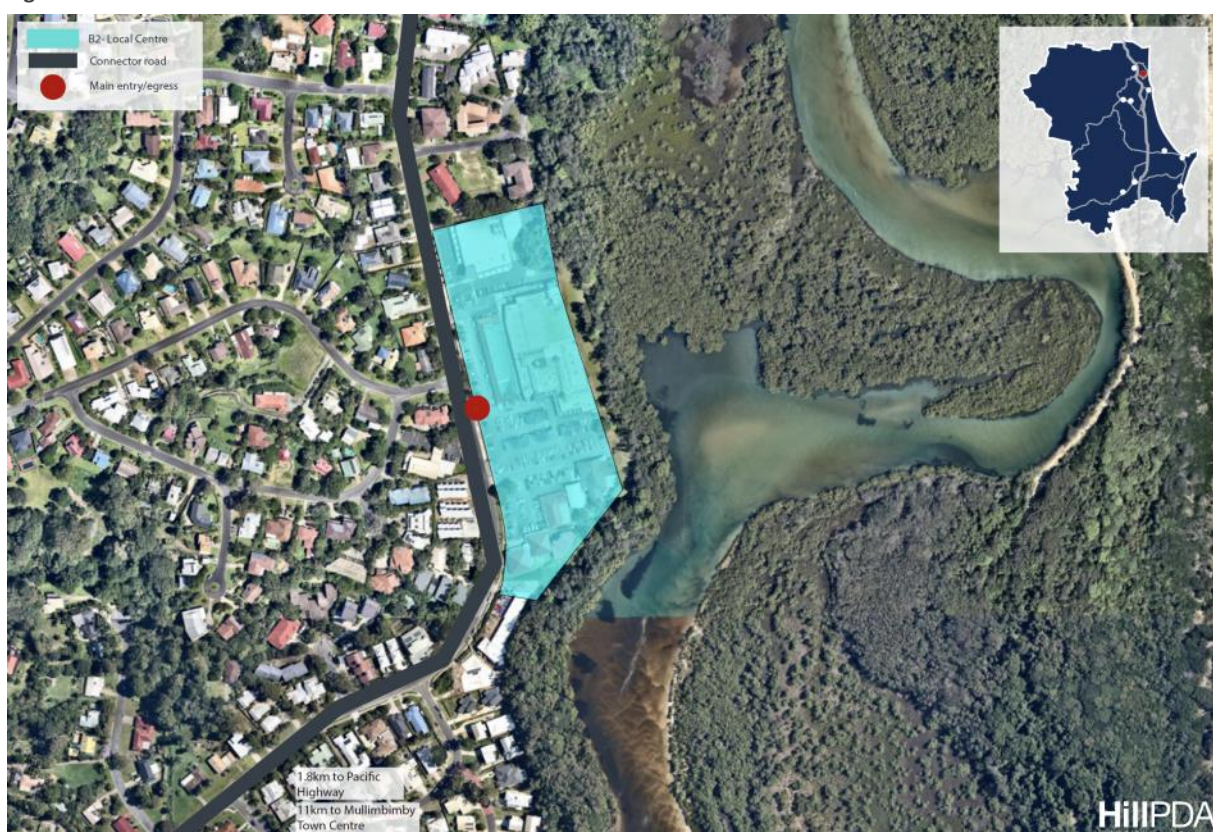
The Centre contains a standalone shopping centre known as Ocean Village which provides a range of retail and commercial uses that cater for the surrounding residents and any visitors passing through. The main anchors of Ocean Village are a Target Country and Coles supermarket. A range of speciality retailing and professional services such as real estate and banking are available within in the shopping centre

Within the B2 zone and adjacent to the shopping centre is a Tavern and doctor, dental and physiotherapy services.

Key infrastructure considerations are:

- Serviced by public transport
- Access by Rajah Road
- Access to sewer and water available.

Figure 5-29: Ocean Shores Centre



Source: HillPDA 2018

Table 5-55: Ocean Shores centre quick stats

Category	Ocean Shores centre	Centres in LGA	Precinct contribution to centres
Precinct size	26,877 sqm	542,697sqm	6%
Total floor space	8,721 sqm	240,286sqm	4%
Average lot size	570 sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-56.

Table 5-56: Ocean Shores centre planning parameters

Planning control	Parameters
Land zoning	B2 – Local Centre
Building height	9 metres
Floor space ratio	0.8:1
Bushfire prone land	Partially affected
Minimum lot size	200sqm
Strategic Agricultural Land	Nil
Heritage	Nil

Development applications

There are no significant commercial development applications at present.

Floor space audit

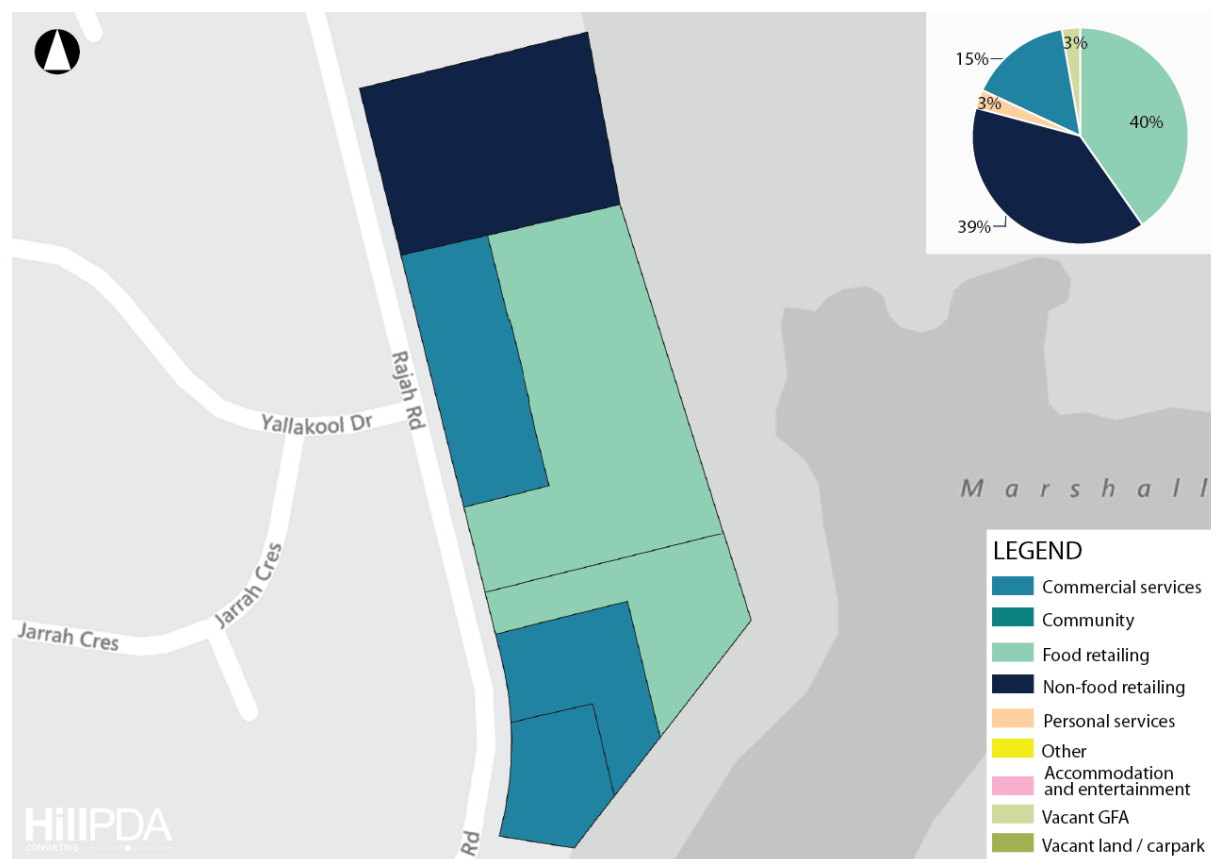
The floor space audit identified the following employment uses as occupying the greatest proportion of gross floor area: supermarkets and grocery stores (24.1%); department and discount stores (22.7%) and specialty non-food stores (14.5%). There is no vacant land available, however there is a floor space vacancy rate of 2.8%.

One third of properties in the precinct incorporated some form of sustainability element. Figure 5-30 identifies the distribution of land uses across the precinct.

Table 5-57: Ocean Shores centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	2,100	24%
Take-away liquor stores and specialty food	655	8%
Specialty non-food stores	3,242	37%
Restaurants and cafes	768	9%
Clothing stores	142	2%
Selected personal services	260	3%
Office and speciality services (i.e. legal, medical)	1,311	15%
Vacant floor space	242	3%
TOTAL FLOOR SPACE	8,721	100%
Vacant land	0	

Figure 5-30: Predominant existing floorspace use mix in Ocean Shores Centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Strong anchor tenants with country target and mainline supermarket - Only Coles supermarket within the LGA - Substantial residential catchment and predominant centre within the LGA - Low vacancy rate - Good mix of uses to service local catchment - Growing residential population through new development	- No direct access to Pacific Motorway - Limited expansion opportunities with residential and environmental zonings land locking centre - Fragmented land ownership - Acid sulfate soil and bushfire prone land affectations.
Opportunities	Threats
Opportunity to increase the intensity of development on site within planning controls (subject to feasibility)	Development of Brunswick Heads to its full potential

Business survey findings

The findings from the business survey, shown in Table 5-58, identified a number of specific ideas, needs, challenges or opportunities to support the Ocean Shores centre. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-58: Ocean Shores centre survey summary

Theme	Survey results	Application to Strategy
Transport	- Development of bicycle ways interlinking the community - Bike/walking track along the Brunswick River between Mullumbimby and Brunswick Heads. - Public transport link to Varsity Lakes train station and Southern Cross University Gold Coast campus	Active and passive transport improvements, including the upgrade of walking/cycling track amenities has the potential to further encourage tourism to the area.
Parking	Business concern about paid parking, as it may push visitors away.	The introduction of paid parking may impact on business visitation and potentially push less viable businesses out of the centre if revenue drops.
Internet	Need for upgraded internet infrastructure.	Poor internet connectivity is a LGA wide constraint and cannot be directly addressed through the Strategy

Bayside Brunswick Heads Centre

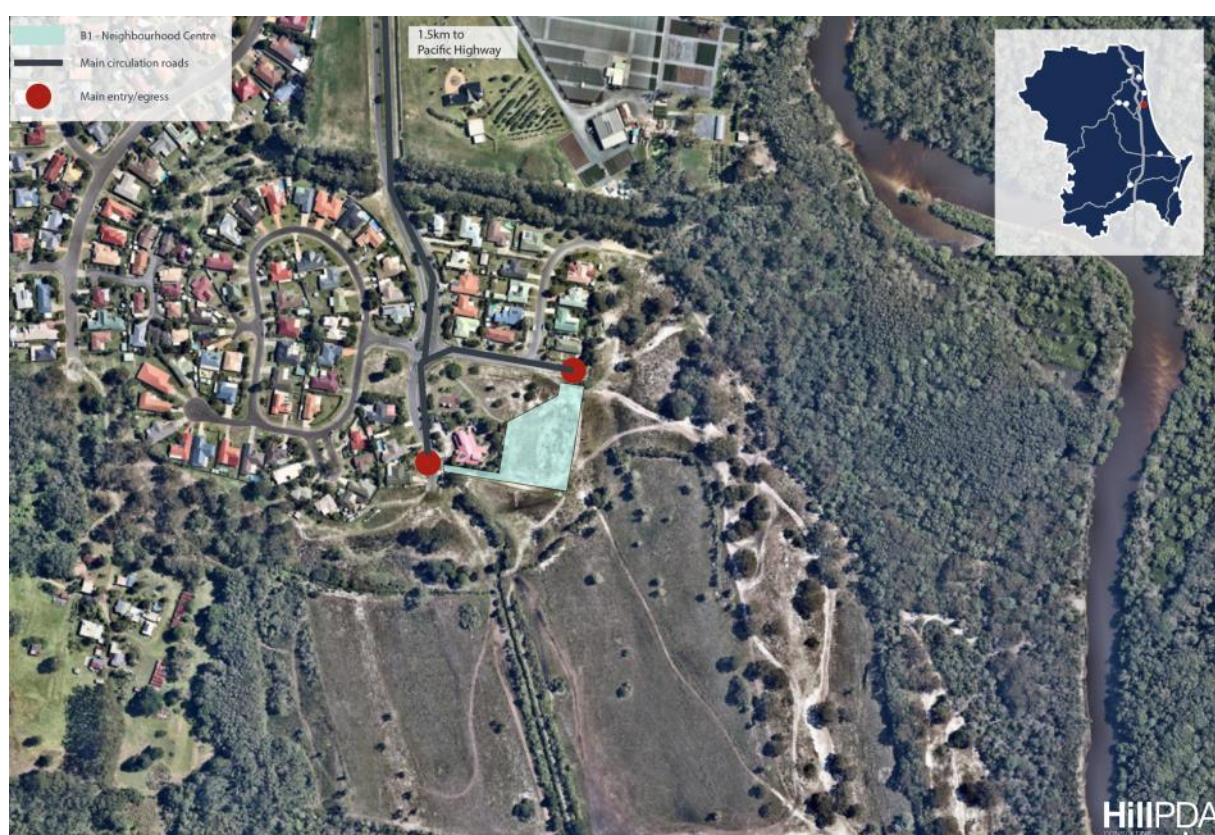
Location characteristics

Bayside Brunswick Heads is a vacant parcel of land zoned B1 – Neighbourhood Centre. It is located 2.5km from the Brunswick Heads Town Centre and 7km from Mullumbimby. It is not well located in relation to transport infrastructure.

Key infrastructure considerations are:

- Access to sewer and water may not be available
- Road access to the centre is via Torakina Road.

Figure 5-31: Bayside Brunswick Heads



Source: HillPDA 2018

Table 5-59: Bayside Brunswick Heads quick stats

Category	Bayside Brunswick Heads centre	Centres in LGA	Precinct contribution to centres
Precinct size	4,271 sqm	542,697sqm	1%
Total floor space	-	240,286sqm	0%
Average lot size	570 sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-60.

Table 5-60: Bayside Brunswick Heads planning parameters

Planning control	Parameters
Land zoning	B1 – Neighbourhood Centre
Building height	9m
Floor space ratio	0.5:1
Bushfire prone land	Partially affected
Minimum lot size	400-600sqm (split zoning)
Strategic Agricultural Land	Nil
Heritage	Nil

Development applications

There are no significant commercial development applications at present.

Floor space audit

The precinct is currently vacant.

S.W.O.T. Analysis

Strengths	Weaknesses
- Residential catchment in close proximity - Proximity to M1	- Isolated undeveloped parcel - Limited passing trade - No street presence – reliant on future development - Surrounding population is unlikely able to support a viable business opportunity at current density
Opportunities	Threats
- Increase residential development south (deferred matter – vacant land) and surrounding to support the delivery of neighbourhood shops - Vacant – develop site	- Feasibility of future business centre - Stagnate population growth

Business survey findings

No specific comments were made in relation to Bayside Brunswick Heads.

Billinudgel village centre

Location characteristics

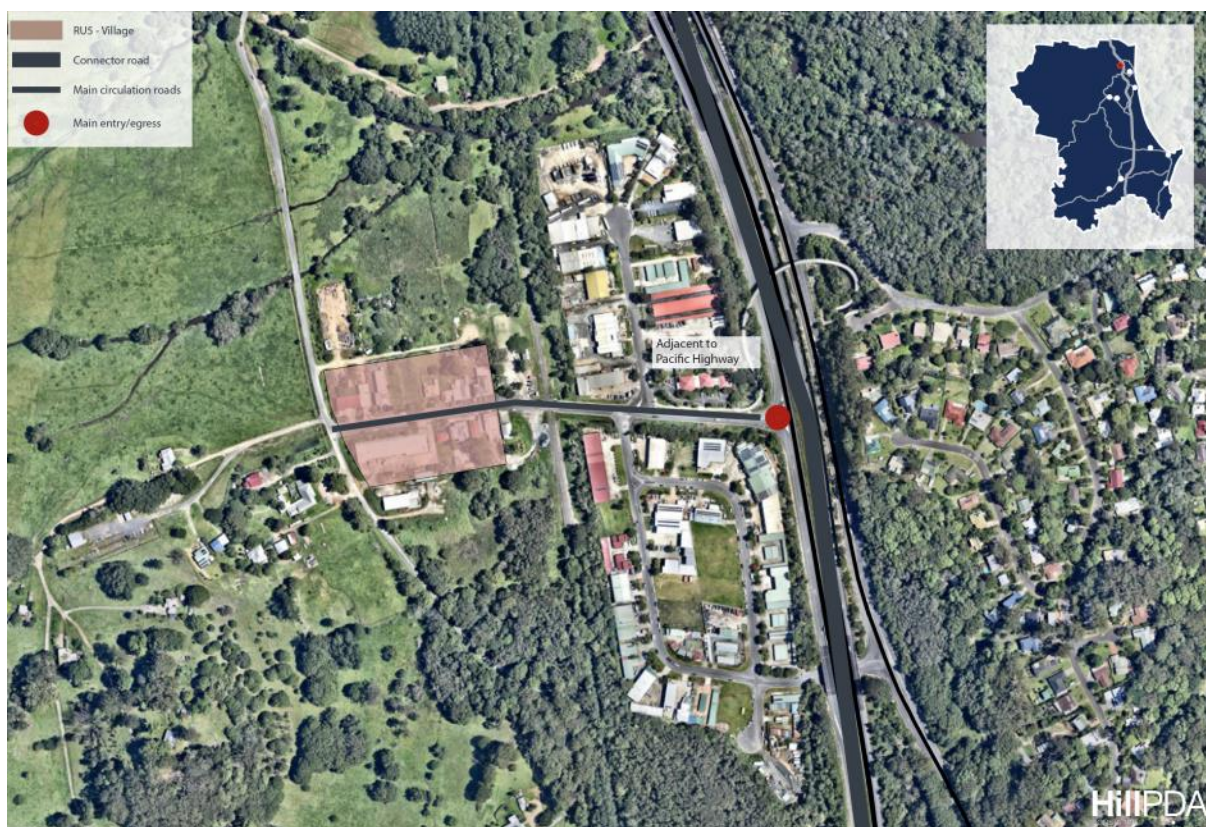
Billinudgel village centre is a small centre zoned RU5 - Village, located adjacent to the Billinudgel Employment Precinct. The centre is in a highly flood prone location. The town is situated approximately 25 minutes' drive north of Byron Bay Town Centre and 25 minutes' drive south of Tweed Heads. Access to the town is via Wilfred Street from the east, which connects to the Pacific Motorway.

The centre services both locals and visitors, with its unique heritage buildings and variety of speciality stores, cafes and restaurants attracting tourists. A general store, newsagency and post office provide essential services.

Key infrastructure considerations are:

- Access to sewer and water available
- Close to intercity bus services.
- Close proximity to Pacific Motorway.

Figure 5-32: Billinudgel village centre



Source: HillPDA 2018

Table 5-61: Billinudgel village centre quick stats

Category	Billinudgel Village centre	Centres in LGA	Precinct contribution to centres
Precinct size	16,905 sqm	542,697sqm	3%
Total floor space	3,574 sqm	240,286sqm	1%
Average lot size	570 sqm	1,060sqm	N/A

Planning parameters

Planning parameters relevant to the centre are identified in Table 5-62.

Table 5-62: Billinudgel village centre planning parameters

Planning control	Parameters
Land zoning	RU5 - Village
Building height	9m
Floor space ratio	0.4:1
Bushfire prone land	Partial
Minimum lot size	2000sqm
Strategic Agricultural Land	Nil
Heritage	Heritage Items

Development applications

There are no significant commercial development applications at present.

Floor space audit

The floor space audit, summarised in Table 5-63, identified the following employment uses as occupying the greatest proportion of gross floor area: other (in this instance this related to automotive) (24.3%); office and speciality services (i.e. legal, medical) (21%) and specialty non-food stores (11.2%). The centre has a vacancy rate of 6.9% and has 2,358sqm of vacant land.

Four per cent of properties in the precinct incorporated some form of sustainability element. Figure 5-33 identifies the distribution of land uses across the precinct.

Table 5-63: Billinudgel village centre floor space audit

Category	Floor space (sqm)	Floor space contribution (%)
Supermarkets and grocery stores	238	7%
Specialty non-food stores	399	11%
Restaurants and cafes	133	4%
Bulky goods stores	249	7%
Selected personal services	132	4%
Office and speciality services (i.e. legal, medical)	752	21%
Other	867	24%
Accommodation/entertainment(incl. hotel/pub)	184	5%
Residential	374	11%
Vacant floor space	246	7%
TOTAL FLOOR SPACE	3,574	100%
Vacant land	2,358	

Figure 5-33: Predominant existing floorspace use mix in Billinudgel Village centre*



Source: HillPDA 2018 *Figure categorises the largest floorspace use on a lot

S.W.O.T. Analysis

Strengths	Weaknesses
- Good mix of core uses to support surrounding industrial estate - Proximity to Pacific Motorway - Direct north-bound ingress and egress to Pacific Motorway	- High vacancy rate (11.4%) - Limited trade catchment with nearby residential uses likely travelling to Ocean Shores - No direct M1 access south - Minimum lot size (2000 sqm) restricts subdivision - Low FSR - Land has flood, bushfire and acid sulfate soil affectations.
Opportunities	Threats
Vacant land available for development in centre	- Significantly flood prone, could deter businesses from locating. - Limited demand for further expansion

Business survey findings

The findings from the business survey, summarised in Table 5-64, identified a number of specific ideas, needs, challenges or opportunities to support the Billinudgel village centre. These have been categorised into themes, with relevance and application to the Strategy identified.

Table 5-64: Billinudgel village centre business survey summary

Theme	Survey results	Application to Strategy
Distribution	Existing courier services are constraining businesses, influencing businesses in relation to whether to locate/remain in Byron LGA.	Poor postal/courier services are generally, a LGA wide constraint and cannot be directly addressed through the Strategy.
Utilities	- Improvements to electricity infrastructure required, minimising outages. - Minimising internet outages.	Poor internet connectivity is a LGA wide constraint and cannot be directly addressed through the Strategy
Flooding	Concerns about flooding in the industrial estate.	Flooding is identified as a significant constraint in this centre and further investment in the centre would need to consider flood mitigation or future impacts of flooding.

PART 3
GROWTH, DEMAND
AND CAPACITY

6.0 GROWTH, DEMAND AND CAPACITY

Employment growth within the LGA may take many forms and would be accommodated within:

- Business centres (i.e. retail, government, accommodation, office and culture)
- Employment precincts (i.e. warehousing, storage, wholesaling and manufacturing and ancillary retail and commercial) and
- Other locations such as stand-alone hospitals and educational institutions.

The following chapter forecasts employment growth and floorspace requirements in Byron LGA over the next 20 years. Demand for industrial lands was based on employment projections while retail and commercial demand modelling was based on household, worker and tourism expenditure growth.

6.1 Employment precinct demand

HillPDA has undertaken modelling to project the demand for industrial lands over the next 20 years. Three employment projection scenarios were developed based on employment trends within the LGA over the last 15 years. There was no State or local government employment projections available for Byron LGA for comparison.

6.1.1 Methodology

The following methodology was applied in undertaking employment projections:

Step one | sourced employment in the LGA by ANZSIC Industry 1 digit from economy.id at the last four census dates (2001, 2006, 2011 and 2016)

Step two | condensed some of the 19 ANZSIC 1 Digit categories into broad industry categories such as industrial, commercial and retail

Step three | calculated the proportion of total employment in each industry category across the LGA's resident working population. This was achieved by dividing total employment by industry category for total residents aged 15 years and over

Step four | assessed the proportional change for each industry category between the census periods

Step five | extrapolated the trends from Step 4 to project employment by industry category

Step six | forecast employment generated in the LGA by applying various proportional growth scenarios (Step five) to the projected resident population aged 15 years and over for the corresponding year.

There are a range of industries such as storage services, farm animal leasing, transport equipment hiring and heavy machinery that are generally located in "blue-collar" areas, generally on sites that are zoned industrial. However, these industries are classified as '*rental, hiring and real estate services*' under ANZSIC 1 Digit category. Other jobs in this category include real estate services which are generally located in business centres. Also the ANZSIC code of '*other services*' includes automotive and other mechanical repair services that are generally located in the industrial zones. To account for this, the jobs in these categories were apportioned to the different zones. For example, 20% of jobs in the industry of '*rental, hiring and real estate services*' and 30% of '*other services*' were apportioned to the industrial zoned precincts.

Historic employment and population was sourced from Economy.id and Community.id while population projections were sourced from the NSW Department of Planning and Environment population projections.

6.1.1.1 Employment projections scenario results

Scenario 1 – Low industrial growth trend is a long term trend scenario that applies the proportional growth experienced over the last 15 years to the projected population of persons aged 15 years and over. Under Scenario 1, total employment within ‘blue-collar’ industries is forecast to decrease to just over 2,820 jobs by 2036, representing a -123 employment or a -4% decrease over the period.

Table 6-1: Employment projections Scenario 1

Industry	2016*	2021	2026	2031	2036	Growth 16-36
Industrial	2,944	2,945	2,919	2,884	2,821	-123
Retail trade	2,069	2,205	2,334	2,469	2,595	526
Commercial	1,380	1,500	1,619	1,745	1,866	486
Administrative/safety	918	956	990	1,024	1,053	135
Construction	1,376	1,535	1,697	1,869	2,040	664
Accommodation and food services	2,011	2,092	2,162	2,234	2,292	281
Health care and social assistance	1,570	1,771	1,977	2,196	2,416	846
Education and training	1,075	1,170	1,263	1,362	1,458	383
Arts and recreation services	381	437	494	556	618	237
Other services	369	412	456	502	549	180
Total employment	14,093	15,023	15,910	16,842	17,708	3,615
Population over 15 years**	26,285	27,650	28,900	30,200	31,350	5,065

Source: HillPDA, *Economy and Community ID, **NSW DP&E (forecast years 2021-2036)

Scenario 2 – Medium industrial growth trend is a stable trend scenario, which applies the 2016 employment proportions in each industry to the projected increase in the working age population (persons over 15 years old). Under Scenario 2, total employment within ‘blue-collar’ industries is forecast to increase to fewer than 3,515 jobs by 2036, representing a 568 employment increase or a 19% increase over the period.

Table 6-2: Employment projections Scenario 2

Industry	2016*	2021	2026	2031	2036	Growth 16-36
Industrial	2,944	3,097	3,237	3,383	3,512	568
Retail trade	2,069	2,176	2,275	2,377	2,468	399
Commercial	1,380	1,451	1,517	1,585	1,646	266
Administrative/safety	918	966	1,009	1,055	1,095	177
Construction	1,376	1,447	1,513	1,581	1,641	265
Accommodation and food services	2,011	2,115	2,211	2,311	2,399	388
Health care and social assistance	1,570	1,652	1,726	1,804	1,873	303
Education and training	1,075	1,131	1,182	1,235	1,282	207
Arts and recreation services	381	401	419	438	454	73
Other services	369	388	406	424	440	71
Total employment	14,093	14,825	15,495	16,192	16,809	2,778
Population over 15 years**	26,285	27,650	28,900	30,200	31,350	5,065

Source: HillPDA, *Economy and Community ID, **NSW DP&E (forecast years 2021-2036)

Scenario 3 – High industrial growth trend is a high growth industrial employment scenario, which applies the annual proportional growth experienced over the 2001 and 2006 census period to the projected population for persons aged 15 years and over.

This period (2001-2006) had a high proportion of growth in employment in ‘blue-collar’ industries when proportioned over the resident working aged population (+0.7% over the period). This scenario is included to reflect the potential impact of increased investment and stimulation within the industrial market in terms of additional land.

Under Scenario 3, total employment within 'blue-collar' industries is forecast to increase to just fewer than 3,605 jobs by 2036, representing a 660 employment or a 21% increase over the period.

Table 6-3: Employment projections Scenario 3

Industry	2016*	2021	2026	2031	2036	Growth 16-36
Industrial	2,944	3,118	3,280	3,450	3,605	660
Retail trade	2,069	2,192	2,307	2,427	2,537	468
Commercial	1,380	1,483	1,583	1,688	1,788	409
Administrative/safety	918	974	1,026	1,081	1,131	213
Construction	1,376	1,503	1,629	1,763	1,893	517
Accommodation and food services	2,011	2,108	2,195	2,286	2,364	353
Health care and social assistance	1,570	1,674	1,773	1,877	1,974	404
Education and training	1,075	1,144	1,210	1,278	1,342	267
Arts and recreation services	381	402	421	441	459	78
Other services	369	391	412	434	453	84
Total employment	14,093	14,924	15,702	16,517	17,259	3,166
Population over 15 years**	26,285	27,650	28,900	30,200	31,350	5,065

Source: HillPDA, *Economy and Community ID, **NSW DP&E (forecast years 2021-2036)

6.1.2 Employment projections to floorspace projections

HillPDA have used the results of the floorspace audit to allocate (total employment) to the industries located in the LGA's employment precincts. The table below sums all the forecast jobs to be allocated to the industrial zoned precincts.

Table 6-4: Forecast jobs in the industrial zoned precincts in Byron LGA by 2036

Industry	Proportion of total jobs directed to Industrial Zoned Precincts	Total Jobs by 2036		
		Scenario 1	Scenario 2	Scenario 3
Industrial	98%	2,765	3,442	3,532
Retail trade	11%	285	271	279
Commercial	20%	373	329	358
Construction	10%	204	164	189
Accommodation and food services	2%	46	48	47
Health care and social assistance	2%	48	37	39
Education and training	2%	29	26	27
Arts and recreation services	40%	247	182	183
Total		3,998	4,499	4,656

Source: HillPDA 2018

Employment densities have been applied to the total number of jobs generated by an industry type in order to estimate the demand for industrial floorspace in the LGA. Employment densities used in this study were informed by the floorspace survey results, total employment by industry type and HillPDA industry knowledge.

Table 6-5: Forecast demand for floorspace in the employment precincts by 2036

Industry	Employment densities (sqm/worker)	Total floorspace required by 2036		
		Scenario 1	Scenario 2	Scenario 3
Industrial	65sqm	179,725	223,730	229,580
Retail trade	35sqm	9,975	9,485	9,765
Commercial	35sqm	13,055	11,515	12,530
Construction	35sqm	7,140	5,740	6,615
Accommodation and food services	60sqm	2,760	2,880	2,820
Health care and social assistance	40sqm	1,920	1,480	1,560
Education and training	80sqm	2,320	2,080	2,160
Arts and recreation services	80sqm	19,760	14,560	14,640
Total		236,655	271,470	279,670

The scenarios indicate that by 2036, between 236,700sqm and 279,265sqm of additional industrial floorspace will be needed in the LGA.

6.1.3 Employment precinct development pipeline

The following developments within the LGA's employment precincts have development approval. In total, around 3,935sqm of industrial floorspace is approved and in the development pipeline.

Table 6-6: Employment precincts development pipeline

Development	Description	Status
Towers Drive	3 industrial units totalling 707sqm	Development Application
96-100 Centennial Circuit	Development of a microbrewery with 345sqm of retail, 1,666sqm of industrial/warehouse/storage space	Development Application
88-94 Centennial Circuit	Development of industrial space (1,562sqm) and a child care centre (861sqm)	Development Application

6.1.4 Total floorspace and land demand (2036)

Additional floorspace required is floorspace demand in 2036 less current and approved floorspace supply. This is summarised under each scenario in the table immediately below.

Table 6-7: Employment precincts floorspace and land projections

Scenario	Total future floorspace demand (sqm GFA)	Current and pipeline floorspace supply (sqm GFA)	Additional floorspace demand (sqm GFA) 2016-36
1 – Low growth trend	236,702	203,839	32,863
2 – Medium growth trend	271,438	203,839	67,599
3 – High growth trend	279,765	203,839	75,926

Source: HillPDA

Under Scenario 1, an additional 30,865sqm of floorspace would be required by 2036. Under Scenarios 2 and 3 an additional 67,600sqm to 75,925sqm respectively, would be required to accommodate future jobs.

6.1.5 Additional land required to meet projected growth

Typically, the building area of industrial developments does not encompass the entirety of developable land of the parcel. This is a result of the specific site requirements of typical industrial occupiers, such as the need for truck turning areas, parking areas, loading and unloading areas and so on. From experience, built FSR typically ranges from 0.3 to around 0.75 within employment precincts. The floorspace audit confirms this by revealing that the actual built FSR within the precincts ranged between 0.31:1 and 5.1:1, with a total combined FSR across all precincts of 0.45:1. As such, a range of FSR's have been adopted for the projected additional industrial floorspace demand, these being, 0.4:1 to 0.6:1.

However, it is prudent to provide and plan for an additional supply of land (or contingency) above that projected in the interests of price competition. Without some level of vacancies, land values or rents could be inflated, undermining further economic growth and investment. A healthy additional supply of land (or contingency level) is considered to range between 20% and 40%. The projections are based on employed residents and the majority of industries have a self-containment rate of around 70% to 85%. Consequently a mid-range contingency supply has been adopted, being an additional 30%.

When the additional 30% is allowed for, vacancy rates the projections are as follows:

- **Scenario 1 - Low growth trend** | an additional 7.1 hectares to 10.7 hectares of land would be required to accommodate the projected growth in employment.

- **Scenario 2 - Medium growth trend** | an additional 14.6 hectares to 22.0 hectares of land to accommodate the projected growth in employment.
- **Scenario 3 - High growth trend** | an additional 16.5 hectares to 24.7 hectares of land would be required to accommodate the projected growth in employment.

6.1.6 Current industrial land supply

Byron LGA currently provides a total of around 72 hectares of land within its employment precincts. Of this, around 24.4 hectares is undeveloped and could accommodate the majority of the projected demand.

However, a proportion of this undeveloped land may be unsuitable for development or not on the market for a variety of reasons including local environmental and general development constraints. These constraints range from inadequate infrastructure provision, environmental constraints (e.g. flood affectation), to planning controls (e.g. heritage).

To address this, constraints mapping has been undertaken to determine the amount of suitable developable land within this undeveloped land. This provides a more precise analysis of the amount of additional land required.

6.1.7 Additional constrained capacity analysis

The constraints analysis identified and excluded parcels with the following features:

- Flood affected (flooding over 15% of the land parcel)
- Council owned
- Undergoing construction activity
- Occupied for residential purposes
- Parcel too small or narrow to accommodate an industrial building
- Planning controls that limit development potential
- Observed as being used by an adjoining property for a specific purpose.

There were three properties that had a significant proportion of their land area vacant. These properties could be subdivided and as such the vacant land proportion was included within the capacity analysis. Vacant sites with capacity to accommodate future growth are shown in the table below.

Table 6-8: Vacant sites within employment precincts with capacity to accommodate future industrial space

Employment precincts	Lots	Land area (ha)
Byron Arts and Industry	8	2.9
Manns Road Industrial area, Mullumbimby	10	1.8
Bangalow Industrial area	2	0.2
Billinudgel Industrial area	5	0.5
West Byron	1	7.5
Total	22	11.9

Source: HillPDA 2018

Of the 24.4 hectares²⁰ of zoned and undeveloped land in the LGA, around 11.9 hectares currently has capacity to accommodate some of the projected demand.

²⁰ Includes West Byron

Under Scenario 1 (Low industrial growth), the existing land capacity is sufficient to accommodate the projected demand under both FSR scenarios.

Under Scenario 2 (Medium industrial growth), this existing capacity is insufficient to accommodate the projected demand under both FSR scenarios. An additional 2.7 to 10.1 hectares of land would be required to accommodate projected demand.

Under Scenario 3 (High industrial growth), the current capacity is insufficient to accommodate the projected demand under the two FSR scenarios. To accommodate the projected demand additional land of 4.6 to 12.8 hectares would be required.

Table 6-9: Industrial land surplus / undersupply by scenario

Scenario	Developable land (ha)	Projected demand (ha)		Surplus (+)/undersupply (-)	
		@ 0.35:1	@ 0.6:1	@ 0.4:1	@ 0.6:1
Scenario 1	11.9	10.7	7.1	1.2	4.8
Scenario 2	11.9	22.0	14.6	-10.1	-2.7
Scenario 3	11.9	24.7	16.5	-12.8	-4.6

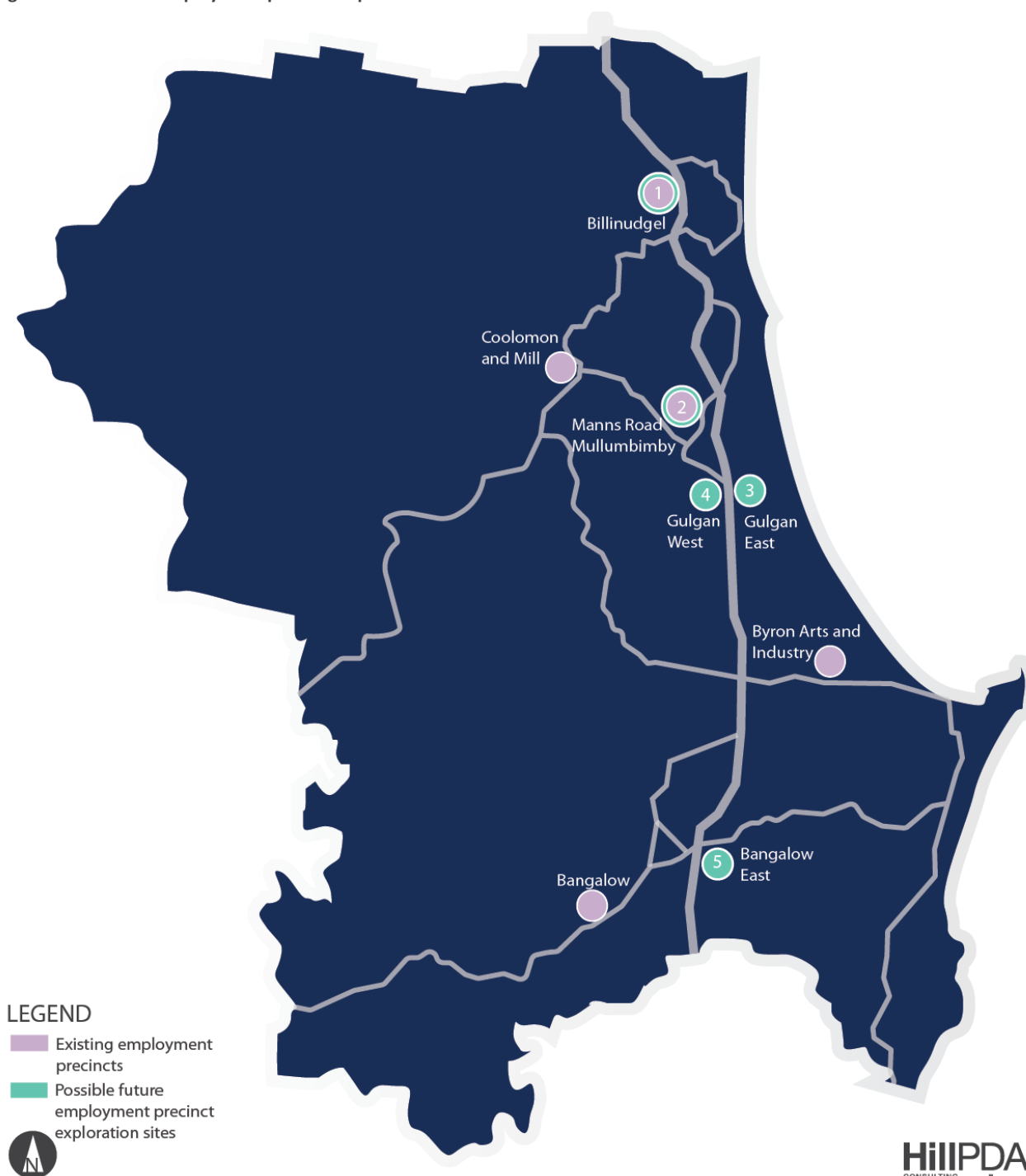
Source: HillPDA 2018

In light of the above projected demand scenarios, it is recommended that an additional employment precinct of around eight to ten hectares be planned for.

6.1.8 Additional suitable land for rezoning

As identified in Figure 6-1, five possible future employment precinct locations have been identified across the LGA. These locations have been chosen because of various locational and infrastructure attributes. A workshop with various State agencies and council representatives identified that there were strengths and challenges as each site. The following tables describe the sites, consider the constraints and determine potential role, yield and sequencing. The sites require further investigation to determine their suitability for urban development.

Figure 6-1: Possible employment precinct expansion locations



Source: HillPDA

Table 6-10: Possible investigation site 1 - Billinudgel expansion

Site	Site 1 Billinudgel consolidation	
Area	11ha	
Description	An existing industrial estate in the north of the LGA. Located on the western side of the Pacific Motorway.	
Strength	Existing industrial area	
	Proximity to Pacific Highway	
Challenge	No direct access to Pacific Motorway south	
	Significantly constrained by flooding	
Traffic	Capacity of on-ramps need to be considered	Moderately constrained
Ecology	Areas to the east would have ecological constraints	Moderately constrained
Primary industry		Minor constraints, investigate further
Socio-economic	Good surrounding workforce catchment	Minor constraints, investigate further
	Highly flood prone	
Flood	Opportunity for flood levy	Highly constrained
Preferred role	Industrial urban service land (IN1)	
Potential yield	<1ha	
Sequencing	Medium term	

Table 6-11: Possible investigation site 2 - Manns Road expansion

Site	Site 2 Manns Road expansion	
Area	3ha	
Description	Capacity to expand the existing Manns Road industrial estate to the west of the existing zoned area.	
Strength	Existing industrial area	
	Proximity to surrounding residential	
Challenge	Flat cleared site	
	Flood prone land	
Traffic	Regionally significant farmland	
	Distance from highway	
Ecology	No direct access to Pacific Motorway	
	Capacity of on and off-ramps needs to be considered	Moderately constrained
Primary industry	Workers can access the site without travelling on motorway	
Socio-economic	Further investigation required	Minor constraints, investigate further
	Regionally significant farmland	Moderately constrained
Flood	Located close to an existing residential workforce	
Preferred role	Possible synergies with existing industrial area	Minor constraints, investigate further
Potential yield	Flood prone	Moderately constrained
Sequencing	Industrial urban service land (IN1)	
	2.4ha	
	Medium term	

Table 6-12: Possible investigation site 3 - Gulgan East

Site	Site 3 Gulgan East	
Area	23ha	
Description	Land covering includes existing wreckers yard, service station, RMS site and Council owned site located to the east of Gulgan Road interchange that encompasses the Tyagarah airfield.	
Strength	- Multi-directional access - Some government owned sites - Relatively flat and clear land (in some locations) - Optimises the use of council land - Removes noise complaints from aircrafts - Capacity to expand north onto the Bluesfest site in the long term future.	
	- Ecological sensitivities - Distance from existing water and sewerage - Prime koala habitat - Intersection engineering constraints	
Challenge	- High ecological and conservation value vegetation on some areas of site. - Intersection on eastern side would need further separation from highway	
Traffic	Ramp capacity	Moderately constrained
Ecology	- Significant vegetation in some location - Prime koala habitat - Offsets would be required - Opportunity for revegetation	Moderately constrained
Primary industry	Agricultural landscape	Moderately constrained
Socio-economic	- Good location to service multiple residential catchments - Potential cultural heritage	Minor constraints, investigate further
Flood	Varying degrees of flooding	Minor constraints, investigate further
Preferred role	General Industry (IN1) to support industrial and urban services	
Potential yield	10ha	
Sequencing	Short term – Tyagarah Airfield	

Table 6-13: Possible investigation site 5 - Gulgan West

Site	Site 4 Gulgan West	
Area	51ha	
Description	Located to the west of the Pacific Highway at the Gulgan Road interchange. North of Foxs Lane and south of Gulgan Road.	
Strength	- Direct north and south-bound ingress and egress to Pacific Highway - Disused rail corridor to the west - Good proximity to potential future residential release areas - Relatively flat and cleared are	
	- Regionally significant farmland - Land in private and multiple ownership - Distance from existing water and sewerage infrastructure - Flood prone (further investigation required)	
Challenge	Significant vegetation clusters	
Traffic	- Intersection on eastern side would need further separation from highway - Ramp capacity	Moderately constrained
Ecology	Further investigation required	Moderately constrained
Primary industry	- Agricultural landscape - Scenic amenity	Moderately constrained
Socio-economic	- Job opportunity for potential future residents at Saddle Road - West seen as longer term site	Minor constraints, investigate further
Flood	Relatively flood free	Minor constraints, investigate further
Preferred role	Agricultural ancillary development (i.e. food packaging, food production etc.)	
Potential yield	14.4ha	
Sequencing	Long term	

Table 6-14: Possible investigation site 5 - Bangalow East

Site	Site 5 Bangalow East	
Area	26 ha	
Description	Located to the south of Bangalow Road on the eastern side of the Pacific Highway. The site is predominantly owned by the RMS.	
Strength	- Government owned - Close to highway - Proximity to Bangalow Village - Within drinking water catchment - Not close to residential	
	- Regionally significant farmland - Access limitations to the highway, no direct north bound - Visually prominent	
Challenge	Land acquisition negotiation	
Traffic	- Restricted vehicle accessibility - Bangalow Road not designed for large vehicles - Coming from south - access via Ewingsdale Road - not appropriate	Highly constrained
Ecology	- Threatened grass species - HEV mapping layer - Would need to offset	Highly constrained
Primary industry	- Scenic amenity - Agricultural landscape	Highly constrained
Socio-economic	Close to Ballina industrial areas and not as essential	Moderately constrained
Flood	Relatively flood free	Minor constraints, investigate further
Preferred role	Agricultural ancillary development (i.e. food packaging, food production etc.)	
Potential yield	12ha	
Sequencing	Long term	

6.2 Commercial floorspace demand modelling

Commercial demand for each commercial centre within Byron LGA has been modelled. The demand modelling is based on household expenditure growth forecasts. The specific steps were:

- Defining sources of retail expenditure
- Defining a trade area for each centre
- Deriving population forecasts for each trade area
- Using household retail expenditure data to calculate the increase in total expenditure generated in the trade area as a result of population and expenditure growth. Worker and tourism expenditure is also factored in
- Applying target turnover rates to retail expenditure to determine floorspace demand
- Considering demand in the context of existing and proposed development.

The methodology is described in detail below.

6.2.1 Sources of retail expenditure

6.2.1.1 Resident population expenditure

The main source of retail expenditure is the surrounding resident population. Modelling sources household expenditure from Anysite 2017 household expenditure data. Population projections are also sourced from the Department of Planning and Environment's Population Projections (2016).

A compound growth rate of 0.8% per annum was applied to project the population to 2041. This growth rate was sourced from the Department of Planning and Environment's Population Projections (2016).

A Residential Strategy is being prepared for Byron Shire to identify locations with potential capacity for future urban housing. Consideration has been given to future residential release areas as well as infill capacity in existing residential areas. Preliminary projections for 2036 indicate that Byron Bay and Mullumbimby are likely to experience greater urban population growth compared to Ocean Shores, Bangalow and Brunswick Heads.

6.2.1.2 Worker spend expenditure

Typically, workers spend between 20% and 40% of their annual retail expenditure near their place of work, depending on the retail offer provided. As such, this is an important expenditure source for calculating demand for retail floorspace. The projections exclude workers that also live within the defined trade area so as not to double count with the resident population described above. HillPDA have applied self-sufficiency rates by industry type (as identified by Forecast.id) to the 2016 employment in each centre to extract those workers who do not live in the area.

Expenditure was assumed at \$2,760 per annum from each worker. Of this 20% was assumed to be directed towards supermarkets and grocery stores; 10% to take-away liquor stores; 20% to specialty food stores; 35% to fast-food stores and 15% directed towards restaurants and cafes.

6.2.1.3 Tourism and visitor expenditure

According to Tourism Research Australia over 1.7 million tourists visited Byron LGA in 2016. Of these 182,000 were international visitors, 704,000 were domestic overnight visitors and 838,000 were domestic day visitors. Combined, these visitors spent \$581 million within the LGA, including \$81 million from international tourists, \$429 million from domestic overnight tourists and \$70 million from domestic day visitors.

According to the ABS, in 2016 around 31% of international visitor spend was directed toward retail expenditure such as take away food; restaurant meals, alcohol and other goods and services compared to 28% for domestic visitors and 31% for domestic day visitor spend.

Applying these proportions to total spend by visitor type, reveals that over \$167 million of tourism expenditure was captured by retail services. The majority of this is assumed to be captured by Byron town centre followed by Bangalow town centre, Brunswick Heads town centre and Mullumbimby town centre – assumed at 65%; 12.5%; 12.5% and 10% respectively.

According to Economy.id the number of international visitor nights has increased at an annual compound growth rate of 3% per annum over the eight year period from 2008/09 while domestic visitor nights have increased at 5% per annum and visitor day trips have increased at 2% per annum. A conservative annual increase at half these rates has been applied.

Total retail expenditure has been proportioned across various retail categories according to the type and amount of retail offered within the centre. For example, the bulk of visitor expenditure on apparel and café/restaurants is captured in Byron and Bangalow centres. Little of this expenditure is captured in Mullumbimby and Brunswick Heads.

6.2.2 Defining a trade area

The trade area served by a retail centre has been determined by considering:

- The strength and attraction of the centre as determined by factors such as the composition, layout, ambience/atmosphere and car parking in the centre/facility
- Competitive retail centres, particularly their proximity to the subject centre and respective sizes, retail offer and attraction
- The location and accessibility of the centre, including the available road and public transport network and travel times
- The presence or absence of physical barriers, such as rivers, railways, national parks and freeways.

A Primary Trade Area is an area to which the majority of centres retail expenditure is captured while a Secondary Trade Area (STA) is area where expenditure is also sourced however usually at a lesser proportion. The Main Trade Area (MTA) is the PTA and STA combined. The implications of trade area definitions are considered below.

6.2.3 Bangalow town centre

Bangalow town centre provides a total of 11,850sqm of floorspace. Of this total floorspace, around 8,615sqm is retail and commercial floorspace, of which just under 495sqm or 5.8% was vacant.

Of the retail and commercials space, 27% was attributed to commercial uses such as travel agents, medical uses, financial and legal services.

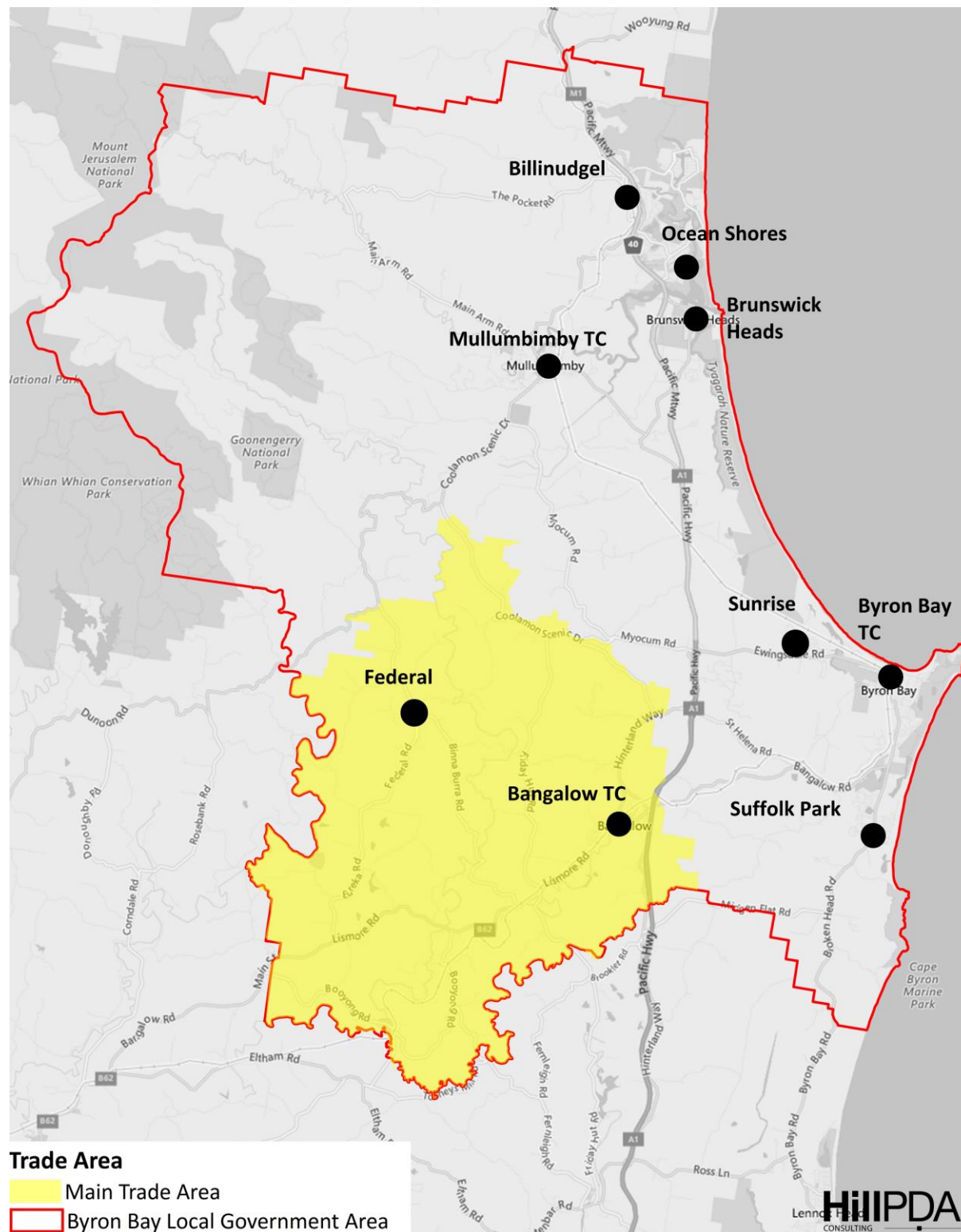
The anchor of the centre is a small Foodworks supermarket (450sqm) providing weekly and top up shopping for local residents, workers and visitors. The centre also has number cafes/restaurants, a pub and clothing stores. The centre is a tourist destination attracted by the retail offer and historic preservation of the township.

6.2.3.1 Bangalow town centre trade area

Bangalow town centre's trade area encompasses the suburbs around the township and to the west. Surrounding centres of Mullumbimby, Byron Bay, Lismore, Ballina and Suffolk Park restrict the town's trade

area, with significant leakage occurring to these centres, primarily as a result of the lack of a full line supermarket.

Figure 6-2: Bangalow town centre retail trade area



6.2.3.2 Resident population growth and total retail expenditure generated

The population within the MTA is projected to increase just fewer than 5,190 residents in 2017 to around 6,135 residents by 2041, representing an increase of around 941 residents or 18% over the period.

Table 6-15: Bangalow town centre population projections

	2017	2021	2026	2031	2036	2041	Growth 17-41
MTA Total	5,192	5,376	5,523	5,745	5,879	6,133	941

Source: AnySite 2017, HillPDA

Bangalow Trade Area residents are estimated to generate over \$79 million in retail expenditure in 2017 with this forecast to increase to around \$118 million by 2041, representing an increase of \$39 million or 50% over the period. Supermarket expenditure alone is projected to increase by \$13 million over the period, reaching an annual expenditure of around \$38 million by 2041.

Table 6-16: Total retail expenditure by retail store type - residents within MTA (\$2017)

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	25.1	27.1	29.2	31.9	34.3	37.7
Take-away Liquor Stores	2.7	2.9	3.2	3.5	3.7	4.1
Specialty Food Stores	2.9	3.2	3.4	3.7	4.0	4.4
Fast-Food Stores	3.5	3.8	4.1	4.5	4.9	5.3
Restaurants, Hotels and Clubs*	6.9	7.5	8.1	8.8	9.5	10.4
Department Stores	5.4	5.9	6.3	6.9	7.4	8.2
Apparel Stores	5.7	6.2	6.7	7.3	7.9	8.6
Bulky Goods Stores	12.0	13.0	14.0	15.3	16.5	18.0
Other Personal & Household Goods Retailing	11.6	12.5	13.5	14.7	15.8	17.3
Selected Personal Services**	2.6	2.8	3.0	3.3	3.6	3.9
Total	78.6	84.7	91.5	100.0	107.6	117.9

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) ** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

6.2.3.3 Capture rates

Bangalow town centre is not expected to capture all of the retail expenditure generated within the MTA. The close proximity of Byron Bay, Lismore and Mullumbimby town centres coupled with the type/quality of retail floorspace provided within the centre, significantly restricts the amount of expenditure captured by the centre.

For this reason the following capture rates have been applied to the corresponding trade area.

Table 6-17: Bangalow town centre trade area capture rates

Store type	PTA
Supermarkets & Grocery Stores	35%
Take-away Liquor Stores	60%
Specialty Food Stores	20%
Fast-Food Stores	20%
Restaurants, Hotels and Clubs	30%
Department Stores	0%
Apparel Stores	30%
Bulky Goods Stores	10%
Other Personal & Household Goods Retailing	30%
Selected Personal Services	30%

Source: HillPDA

6.2.3.4 Other expenditure sources

HillPDA estimates that there were around 152 workers within Bangalow town centre that lived outside of the LGA 2016. These workers generated an additional \$0.4 million in retail expenditure in 2017 which was captured by the centre. This is forecast to increase to just over \$0.5 million by 2041.

In 2017 it is estimated that the centre also captured \$21 million in tourism and visitor retail expenditure, with this increasing to around \$48 million by 2041.

6.2.3.5 Total retail expenditure captured by Bangalow town centre

Applying the various capture rates and accounting for worker and visitor expenditure, it is estimated that retailers within Bangalow town centre captured around \$42 million in retail expenditure in 2017, with this forecast to increase to over \$80 million by 2041.

Table 6-18: Total expenditure captured by Bangalow town centre

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	9.9	10.9	11.8	13.1	14.1	15.7
Take-away Liquor Stores	4.8	5.7	6.5	7.5	8.3	9.6
Specialty Food Stores	3.8	4.6	5.4	6.2	7.0	8.1
Fast-Food Stores	3.0	3.5	4.0	4.7	5.2	6.0
Restaurants, Hotels and Clubs	7.4	8.8	10.1	11.7	13.0	15.1
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	7.0	8.3	9.6	11.2	12.4	14.5
Bulky Goods Stores	1.2	1.3	1.4	1.5	1.6	1.8
Other Personal & Household Goods Retailing	3.5	3.7	4.0	4.4	4.7	5.2
Selected Personal Services	1.8	2.1	2.4	2.8	3.1	3.6
Total	42.4	48.9	55.4	63.0	69.6	79.6

Source: AnySite 2017, HillPDA

6.2.3.6 Retail floorspace demand

In order to determine the demand for retail floorspace, target turnover rates (\$/sqm of retail floorspace, and otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected retail expenditure drawn to the centre. These target turnover rates are broadly the rates at which retail development would experience strong trading conditions.

Using the target turnover rates identified below, the current demand for retail and commercial floorspace within the centre is estimated at around 9,945sqm, increasing to 16,655sqm over the 24 year period to 2041.

Table 6-19: Demand for retail and commercial floorspace

YEAR	Target Rate*	2017	2026	2036	2041
Supermarkets & Grocery Stores	9,000	1,102	1,258	1,429	1,545
Take-away Liquor Stores	9,500	508	656	799	901
Specialty Food Stores	7,000	546	731	905	1,031
Fast-Food Stores	7,000	422	551	674	762
Restaurants, Hotels and Clubs	4,500	1,642	2,148	2,630	2,977
Clothing Stores	4,500	1,549	2,046	2,516	2,857
Bulky Goods Stores	3,000	401	446	499	534
Other Personal & Household Goods Retailing	4,000	867	965	1,079	1,154
Selected Personal Services	3,000	612	777	938	1,052
Total Retailing		7,650	9,578	11,469	12,812
Commercial floorspace demand (@ say 30%)**		2,295	2,874	3,441	3,844
Total floorspace demand		9,945	12,452	14,910	16,656

Source: HillPDA * Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies. Includes an allowance of Real Growth of 5%/ann in RTD in line with historic average. ** additional 30% of retail floorspace demand

6.2.3.7 Retail and commercial development pipeline

There are currently two developments within the pipeline for Bangalow town centre. A mixed use development at 9 Station Street proposes the construction of six shop top housing dwellings and commercial premises for three tenancies (for use as shop, restaurant or cafe or office premises). The additional floorspace has been assumed at 100sqm per tenancy (300sqm total). The development determination has not yet gained approval and has been deferred.

Proposed alterations and additions to an existing commercial premise located at 14 Station Street, Bangalow have been granted development approval and is scheduled for completion in June of 2018. Given that this is an alteration to an existing commercial building, no additional floorspace has been accounted for.

6.2.3.8 Floorspace supply versus demand

Currently, Bangalow town centre provides around 8,615sqm of retail and commercial floorspace. Analysis reveals that the surrounding resident, worker and visitor population has a likely demand of around 9,950sqm of floorspace. This means that there is a current undersupply of floorspace of around 1,335sqm within the centre. Given the smaller nature of the centre this is an undersupply of around 12.5% which is notable. This undersupply is forecast to increase to around 8,000sqm by 2041.

The centre contains a FoodWorks supermarket of around 450sqm. Currently there is demand for 1,100sqm of supermarket floorspace provision, increasing to around 1,500sqm by 2041. By 2041, this demand would be sufficient enough for the replacement of the current supermarket with an Aldi or IGA style supermarket of around 1,000 to 1,500sqm. A larger supermarket than what is currently provided would increase the viability and attractiveness of the centre and help reduce the amount of retail expenditure leakage.

Table 6-20: Floorspace under/oversupply

Category	Floorspace supply	Floorspace demand				Under/oversupply
	2017	2017	2026	2036	2041	
Supermarkets & Grocery Stores	460	1,102	1,258	1,429	1,545	-1,085
Take-away Liquor Stores and specialty food	577	1,054	1,387	1,703	1,932	-1,355
Fast-Food Stores	0	422	551	674	762	-762
Restaurants, Hotels and Clubs	675	1,642	2,148	2,630	2,977	-2,302
Clothing Stores	1,373	1,549	2,046	2,516	2,857	-1,484
Bulky Goods Stores	866	401	446	499	534	332
Selected Personal Services	800	612	777	938	1,052	-252
Other specialties*	1,001	867	965	1,079	1,154	-153
Total retailing	5,751	7,650	9,578	11,469	12,812	-7,061
Commercial floorspace	2,366	2,295	2,874	3,441	3,844	-1,478
Vacant floorspace	495					
Total floorspace	8,612	9,945	12,452	14,910	16,656	-8,044
Floorspace under/oversupply (-/+)		-1,333	-3,840	-6,298	-8,044	

Source: HillPDA 2018

6.2.3.9 The need for additional appropriately zoned land

Theoretical capacity

HillPDA have assessed the theoretical floorspace capacity of the centre, this achieved through calculating the maximum development potential of each land parcel (land area*permitted FSR).

However, this methodology has some limitations. For example, it does not take into consideration the feasibility of redevelopment, current land uses mix, current build form/floorspace or if the FSR can be achieved under the current permissible building height limit. As such, a more detailed feasibility assessment should be undertaken to assess the redevelopment potential of various land uses within the town centre.

Applying this methodology, Bangalow town centre has a theoretical floorspace capacity of 31,295sqm. As of 2017, around 28% of the floorspace within the centre was other uses such as accommodation, residential, recreation fitness and other uses. Applying this proportion to the theoretical development capacity leaves a residual 28,010sqm for retail and commercial floorspace. This theoretical capacity is sufficient to accommodate the forecast demand in retail and commercial floorspace over the next 24 years.

Constrained capacity

Capacity analysis to remove constrained properties that have already been developed to their maximum potential has been undertaken to provide a more precise estimate as to the actual supply in the centre.

The map below provides an overview with the parcels identified that accommodate additional capacity within the centre.

Figure 6-3: Bangalow town centre constrained capacity



The following figure identifies 16 properties (10,494sqm land area) with additional development capacity. The theoretical capacity (land area x FSR) of these 16 properties is around 10,494sqm GFA.

Considering the above, an additional 7,462sqm (residual capacity) of floorspace could be accommodated within the centre, revealing a shortage of around 362qm. It is unlikely, however, that the entirety of the additional floorspace would be developed as retail/commercial space. Assuming a conservative 20% of the residual floorspace is directed towards non retail/ commercial uses, results in a higher deficit scenario of around 2,765sqm.

Assuming an FSR of 1:1 and allowing for an additional 30% capacity, an additional 0.04 to 0.4 hectares of land would be required to accommodate the projected deficit scenario.

Table 6-21: Bangalow town centre additional land requirements

(a) 16 properties land area (sqm)	(b) Existing floorspace (sqm)	(c) Total theoretical capacity [(a) x FSR]	(d) Residual capacity [(c)-(b)]	(e) Demand	(f) Deficit (sqm) [(d)-(e)]	Land required (sqm) [((f)/1] Land required (ha)*	Land required (ha)*(g)/10,000
10,494	2,852	10,494	7,642	8,044	-362 to -4,292	-362 to -4,292	0.04 to 0.4

Source: HillPDA *assumes an FSR of 0.75:1 and additional capacity of 30% - higher projection also includes a proportion of floorspace developed as non-retail/commercial uses

Expansion of the town centre is constrained by various uses including large land holdings, heritage conservation, possible flooding, the railway line or distance from the main road. A possible expansion of the centre eastward along Byron Street could be investigated to include an area of around 0.9 hectares in size.

Some of the premises within this area already contain commercial uses and would be a natural extension of the town centre.

The properties also front the main road with the length of the centre only being extended to around a 475 metre length. The development of an anchor use within the expansion area would help draw people between the existing pub and food works at one end and the other, thereby increasing passing trade and viability of other uses within the centre.

6.2.4 Byron Bay Trade Area

Byron Bay town centre, Sunrise Boulevard and West Byron new release business centre are within the same trade area due to their close proximity.

Byron Bay town centre is the largest centre within the LGA in terms of land size and floorspace provision. The centre has around 118,625sqm of floorspace of which around 42,000sqm is related to retail and commercial floorspace, and just under 995sqm or 2% was vacant. This low vacancy rate may indicate strong demand with limited space available. Typically a vacancy rate of 4%-5% is seen a healthy rate as it allows new tenants to locate within the centre and existing tenants to relocate.

Of the retail and commercial space, 27% was attributed to commercial uses such as travel agents, financial, medical, finance and legal services. Typically, around 30% of commercial space is occupied by such uses and Byron is relatively in line.

The centre contains a Woolworths and Aldi supermarket with a supportive small spar supermarket and convenience store that provide weekly food and grocery convenience shopping services for local residents, workers and visitors. The numerous accommodation services, bars, cafes and restaurants increases the attractiveness of the centre, helping to create additional pedestrian traffic and passing trade opportunities for other shops.

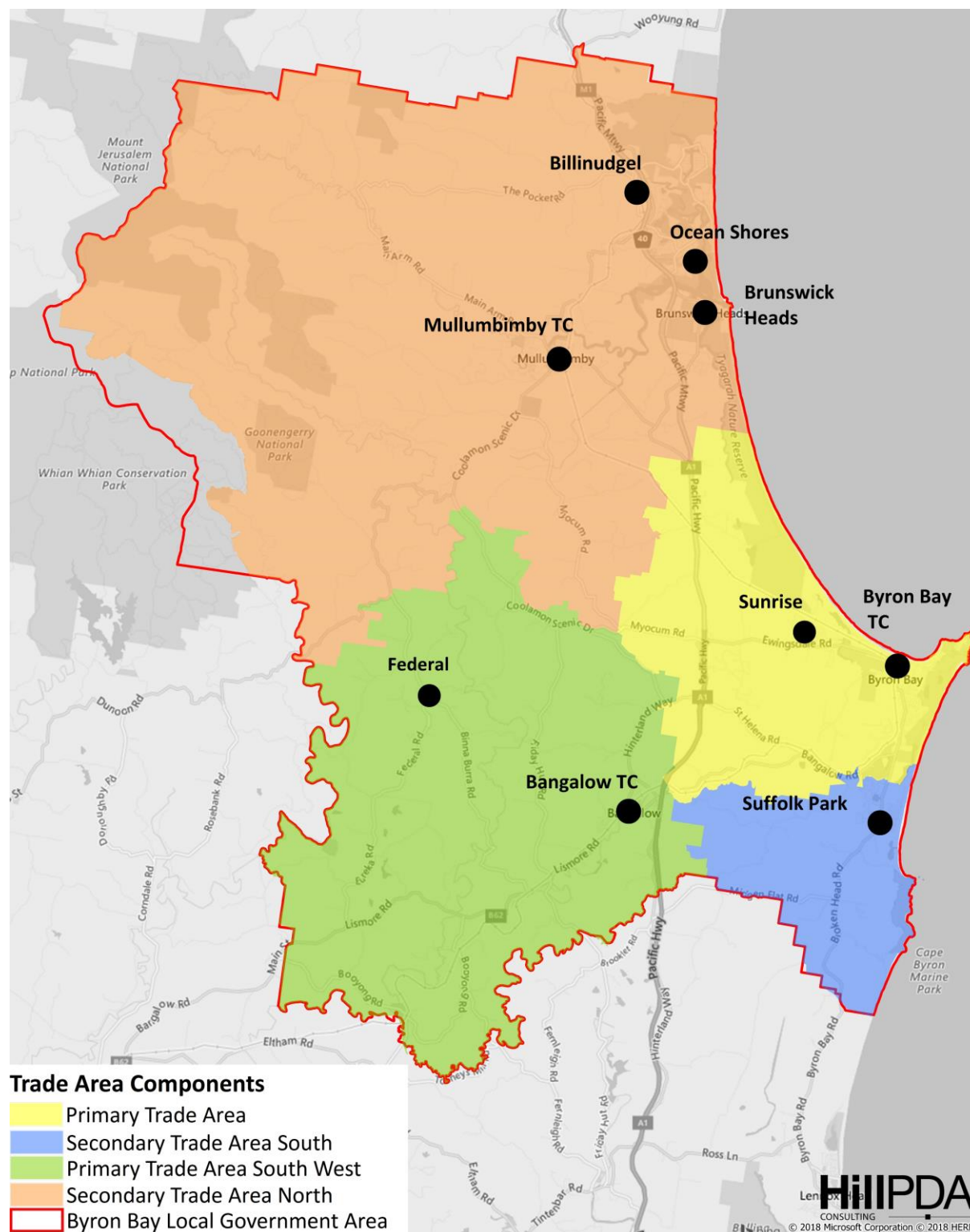
Sunrise shopping centre, located within the Byron Arts and Industry employment precinct, is in close proximity to Byron Bay town centre. The shopping centre provides for the shopping needs of the workers within the industrial estate and the residential population along Sunrise Boulevard and Bayshore Drive. The shopping centre provides around 3,800sqm of retail and commercial floorspace including a Supa-IGA supermarket of 1,700sqm. A liquor store of around 260sqm also provides an anchor role for the centre. Given its close proximity to Byron Bay town centre, Sunrise Shopping Centre has been included in its trade area.

Combined, the two centres provide a total of around 122,445sqm of floorspace. Of this around 45,700 is retail and commercial floorspace, with 995sqm or 2% being vacant.

6.2.4.1 Byron Bay and Sunrise Boulevard retail trade area

The MTA encompasses the LGA. The size of the MTA is restricted to the south due to the presence of Ballina and Lismore centres and to the north by Tweed Heads.

Figure 6-4: Byron Bay town centre and Sunrise retail trade area



6.2.4.2 Resident population growth and total retail expenditure generated

The population within the MTA is projected to increase from 32,690 residents in 2017 to around 39,589 residents by 2041, representing an increase of around 6,900 residents or 21% over the period. The majority of this growth (53%) is projected to occur within the STA North, followed by the PTA (24%).

Table 6-22: Byron Bay town centre population projections

	2017	2021	2026	2031	2036	2041	Growth 17-41
PTA	7,179	7,434	7,814	8,121	8,476	8,842	1,663
STA - South	4,052	4,195	4,272	4,446	4,514	4,709	657
STA - South West	5,192	5,376	5,523	5,745	5,879	6,133	941
STA 3 - North	16,266	16,845	17,641	18,338	19,081	19,905	3,639
Total	32,689	33,850	35,250	36,650	37,950	39,589	6,900

Source: Anysite 2017, HillPDA

These residents are estimated to generate around \$440 million in retail expenditure in 2017 with this forecast to increase to around \$676 million by 2041, representing an increase of \$237million or 54%. Supermarket expenditure alone is projected to increase by \$75 million, reaching an annual expenditure of around \$215 million by 2041.

Table 6-23: Total retail expenditure by retail store type - residents within MTA (\$2017)

Trade area and retail store type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	139.4	150.6	164.7	180.0	195.8	214.6
Take-away Liquor Stores	15.6	16.9	18.5	20.2	21.9	24.0
Specialty Food Stores	16.3	17.6	19.2	21.0	22.9	25.1
Fast-Food Stores	20.2	21.8	23.8	26.0	28.3	31.0
Restaurants, Hotels and Clubs*	39.7	42.8	46.9	51.2	55.7	61.1
Department Stores	30.2	32.6	35.7	39.0	42.4	46.5
Apparel Stores	31.8	34.3	37.5	41.0	44.6	48.9
Bulky Goods Stores	66.8	72.1	78.9	86.2	93.7	102.8
Other Personal & Household Goods Retailing	64.4	69.6	76.1	83.2	90.5	99.2
Selected Personal Services**	14.7	15.9	17.4	19.0	20.7	22.7
Total	439.1	474.2	518.6	566.8	616.5	675.9

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) ** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

6.2.4.3 Capture rates

Byron Bay is not expected to capture all of the retail expenditure generated in the MTA. The STA North includes Mullumbimby town centre which has a Woolworths and an IGA supermarket. A majority proportion of supermarket expenditure generated by residents in the STA North would be directed towards Mullumbimby town centre. Byron Bay is expected to capture only a minor proportion of supermarket spend generated by the STA North.

For this reason the following capture rates (see Table 6-24) have been applied to the corresponding trade area.

Table 6-24: Byron Bay town centre trade area assumed capture rates

Store type	PTA	STA South	STA South West	STA North
Supermarkets & Grocery Stores	85%	45%	30%	5%
Take-away Liquor Stores	80%	50%	20%	5%
Specialty Food Stores	80%	60%	35%	20%
Fast-Food Stores	80%	60%	35%	10%
Restaurants, Hotels and Clubs	80%	65%	40%	35%
Department Stores	0%	0%	0%	0%
Apparel Stores	65%	60%	25%	20%
Bulky Goods Stores	10%	5%	5%	3%
Other Personal & Household Goods Retailing	80%	65%	35%	25%
Selected Personal Services	80%	70%	35%	25%

Source: HillPDA2018

6.2.4.4 Other expenditure sources

HillPDA estimates that there were around 1,215 workers that lived outside of the LGA in 2016 but work in in Byron Bay town centre and the industrial estates. These workers generated an additional \$3.3 million in retail expenditure in 2017 which was captured by the centre. This is forecast to increase to just over \$4.3 million by 2041.

It is estimated that in 2017, \$118 million in tourism and visitor retail expenditure was captured, which is forecast to increase to around \$248 million by 2041 (2017 dollars).

6.2.4.5 Total retail expenditure captured by Byron Bay town centre

Applying the various capture rates and accounting for worker and visitor expenditure, it is estimated that retailers within the MTA captured around \$247 million in retail expenditure in 2017 with this forecast to increase to around \$459 million by 2041 (measured in 2017 dollars).

Table 6-25: Total expenditure captured by Byron Bay town centre (2017 \$m)

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	62.6	70.3	78.5	87.7	96.4	108.3
Take-away Liquor Stores	21.8	26.0	30.2	34.9	39.1	45.4
Specialty Food Stores	18.1	21.2	24.3	27.9	31.0	35.7
Fast-Food Stores	18.8	21.9	25.1	28.7	31.9	36.7
Restaurants, Hotels and Clubs	53.3	62.6	71.8	82.4	91.8	105.8
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	27.9	32.6	37.4	42.9	47.7	54.9
Bulky Goods Stores	3.3	3.6	3.9	4.3	4.7	5.1
Other Personal & Household Goods Retailing	28.7	31.0	33.9	37.1	40.3	44.2
Selected Personal Services	12.1	13.9	15.8	17.9	19.8	22.6
Total	246.6	283.2	321.0	363.9	402.7	458.7

Source: Anysite 2017, HillPDA

6.2.4.6 Retail floorspace demand

In order to determine the demand for retail floorspace, target turnover rates (\$/sqm of retail floorspace, otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected retail expenditure drawn to the centre. These target turnover rates are broadly the rates at which retail uses would experience strong trading conditions.

Given the nature of Byron Bay town centre as a tourist destination, it is expected that trading conditions within the centre would be stronger than that experienced by other centres within the LGA.

Using the target turnover rates identified below, the current demand for retail and commercial floorspace within the centre is estimated at around 50,750sqm, increasing to 83,500sqm over the 24 year period to 2041.

Table 6-26: Demand for retail and commercial floorspace

YEAR	Target Rate*	Growth	2017	2026	2036	2041
Supermarkets & Grocery Stores	10,000	0.50%	6,262	7,507	8,772	9,607
Take-away Liquor Stores	11,000	0.50%	1,982	2,624	3,229	3,662
Specialty Food Stores	8,000	0.50%	2,263	2,906	3,524	3,959
Fast-Food Stores	8,000	0.50%	2,345	2,999	3,629	4,071
Restaurants, Hotels and Clubs	5,000	0.50%	10,662	13,737	16,693	18,774
Clothing Stores	6,000	0.50%	4,650	5,962	7,227	8,116
Bulky Goods Stores	3,000	0.50%	1,105	1,252	1,417	1,515
Other Personal & Household Goods Retailing	5,000	0.50%	5,734	6,485	7,331	7,840
Selected Personal Services	3,000	0.50%	4,037	5,034	6,016	6,692
Total retailing			39,040	48,506	57,839	64,237
Commercial floorspace demand (@ say 30%)* **			11,712	14,552	17,352	19,271
Total floorspace demand			50,752	63,057	75,190	83,508

Source: HillPDA * Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies** An Allowance for Real Growth in Retail Store Turnover per annum. * ** additional 30% of retail floorspace demand

6.2.4.7 Retail and commercial development pipeline

Assessment of the development pipeline reveals three proposed developments within Byron Bay town centre scheduled for completion over the next few years. If these developments are completed an additional 5,655sqm of retail and commercial floorspace would be provided.

Table 6-27: Byron Bay town centre development pipeline

Development	Description	Year completion	Status
112-114 Jonson St (Mercato)	Removal/demolition of existing commercial building. Construction of 2 story shopping centre. To include 3,800sqm of retail space on ground floor with specialty shops above (assumed 2,000sqm of supportive retail).	2018	Under construction
Bayshore Dr, The Habitat	Construction of mixed use development with 28 residential units, commercial & retail tenancies. Retail (1,389sqm) and commercial space of around 2,020sqm.	2018	Under construction
7 Marvell St Motel	Demolition of existing structures. Construction of tourist accommodation with a retail area of 155sqm	2019	Development Approval
4 Marvell St	Construction of a 3 level motel including a restaurant, bar & shops (floorspace not provided)	2019	Development Application
Jonson & Browning Sts Mixed Use Development	2 x retail premises (617sqm), manager's office (18sqm), end of trip & toilet facilities (29sqm) & storage. Building 2: 26 x serviced apartments & 65 places child care centre (827sqm)	2020	Development Application

Source: CordellsConnect February 2018

6.2.4.8 Floorspace supply versus demand

Currently Byron Bay town centre and Sunrise shopping centre provide around 45,700sqm of retail and commercial floorspace. As such, there is currently a slight undersupply of around 5,000sqm across the centres.

Accounting for the development pipeline, this undersupply is forecast to increase to around 10,500sqm by 2026, increasing to around 30,970sqm by 2041.

Of this demand, a total of 4,500sqm is attributed to supermarket floorspace, this is sufficient for the development of a full-line supermarket typically between 3,000 to 4,000sqm each with supportive smaller style supermarkets typically around 1,000sqm to 1,500sqm.

Currently the trade area contains four supermarkets – Woolworths, Super IGA, Aldi and a smaller Spar supermarket providing a combined 5,000sqm of space.

As such, over the coming years demand is sufficient for the development of an additional a large supermarket of around 3,500sqm by 2031. The development of a new supermarket should be prioritised within existing centres or within new emerging residential areas such as West Byron. However, impacts upon the existing retail hierarchy and other matters such as traffic generation should be considered.

The majority of the projected demand would be directed towards Byron Bay town centre reflecting and enforcing its status as the LGA's premier retail and tourist destination. Sunrise shopping centre is unlikely to accommodate any additional growth unless redevelopment of the site with underground car parking is feasible or planning controls like FSR and build heights are increased. Any growth, within the Sunrise shopping centre area would be accommodated within the adjoining mixed use zoning within developments such as Habitat. The proposed business centre in West Bryon would be an appropriate location to accommodate a proportion of the future demand, with capacity for additional specialty retail and commercial uses around a supermarket.

Table 6-28: Floorspace under/over supply

Category	Floorspace supply*	Floorspace demand				Under/oversupply 2017-41
	2017-2020	2017	2026	2036	2041	
Supermarkets & Grocery Stores	5,053	6,262	7,507	8,772	9,607	-4,554
Take-away Liquor Stores & specialty food	926	4,245	5,530	6,753	7,621	-6,695
Fast-Food Stores	558	2,345	2,999	3,629	4,071	-3,513
Restaurants, Hotels and Clubs	7,792	10,662	13,737	16,693	18,774	-10,982
Clothing Stores	11,892	4,650	5,962	7,227	8,116	3,776
Bulky Goods Stores	1,243	1,105	1,252	1,417	1,515	-272
Selected Personal Services	1,739	4,037	5,034	6,016	6,692	-4,953
Other specialties	7,854	5,734	6,485	7,331	7,840	14
Total retailing	37,057	39,040	48,506	57,839	64,237	-27,180
Commercial floorspace	14,490	11,712	14,552	17,352	19,271	-4,781
Vacant floorspace	994					994
Total floorspace	52,541	50,752	63,057	75,190	83,508	-30,967
Floorspace under/oversupply (-/+)		1,789	-10,516	-22,649	-30,967	

Source: HillPDA *includes development pipeline to 2020

6.2.4.9 The need for additional appropriately zoned land

Theoretical capacity (Byron Bay town centre)

HillPDA have assessed the theoretical floorspace capacity of the centre, by calculating the maximum development potential of each land parcel (land area*permitted FSR).

This methodology has some limitations. For example, it does not take into consideration the feasibility of redevelopment, current land use mix, current build form/floorspace or if the FSR can be achieved under the current permissible building height limit. Consequently, a more detailed feasibility assessment should be undertaken to assess the redevelopment potential of various land uses within the town centre.

Applying this methodology Byron Bay town centre has a theoretical floorspace capacity of 243,100sqm. As of 2017, around 65% of the floorspace within the centre was other uses such as accommodation, residential, and recreation fitness.

Applying this proportion to the theoretical development capacity leaves a residual 140,995qm for retail and commercial floorspace. This theoretical capacity is sufficient to accommodate the forecast demand in retail and commercial floorspace over the next 24 years.

Constrained capacity (Byron Bay town centre)

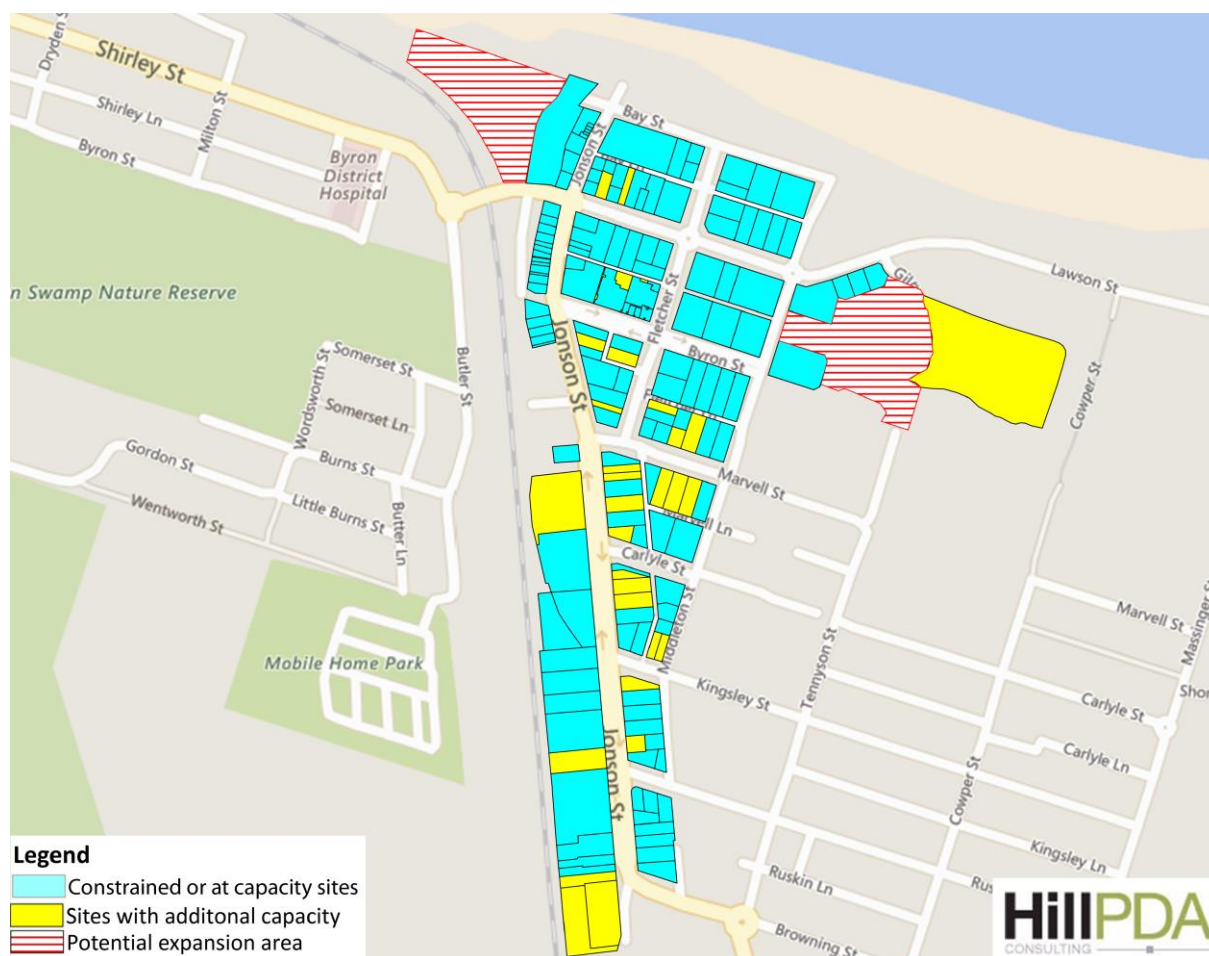
The constrained capacity analysis removes constrained properties or land parcels to provide a more precise estimate as to the additional capacity within the centre.

In undertaking this analysis, the following properties were excluded:

- Any property with a built FSR of 40% or more of that permitted under the current planning framework
- Flood prone properties
- Council owned land
- Properties with residential uses
- Identified heritage items
- Land being used for a purpose which makes redevelopment unlikely.

The map below provides an overview of the parcels identified as able to accommodate additional capacity within the centre.

Figure 6-5: Byron Bay town centre constrained capacity



Assuming 95% of additional retail floorspace demand would be directed towards Byron Bay town Centre, over the next 20 years an additional 26,906sqm of floorspace would need to be accommodated.

There are only 29 properties (50,351sqm land area) with additional development capacity, under the current controls. The theoretical capacity (land area x FSR) of these 29 properties is approximately 44,786sqm GFA.

The residual capacity (37,963sqm) is sufficient to accommodate the projected demand (30,970) in floorspace over the next 20 years. However, it is unlikely that the entirety of this capacity would be developed as retail/commercial floorspace, considering the propensity to develop tourist accommodation.

Applying a conservative 60% directed towards retail/commercial uses and planning for an additional 30%, reveals a shortage in capacity of around 13,445sqm or 1.34ha of additional land required.

Table 6-29: Byron Bay town centre additional land requirements

(a) 29 properties land area (sqm)	(b) Existing floorspace (sqm)	(c) Total theoretical capacity [(a) x FSR]	(d) Residual capacity [(c)-(b)]	(e) Demand	Land required (sqm) [((e*130%)-(d*60%))/1.3]	Land required (ha)* (f)/10,000
50,351	6,823	44,786	37,963	24,425	-13,446*	0.5 – 1.34

Source: HillPDA *assumes an FSR of 1.3:1 and additional capacity of 30% - higher projection also includes a proportion of floorspace developed as non-retail/commercial uses

Two possible areas for expansion of the town centre have been identified. The first area is located to the north of Shirley Street and to the west of Jonson Street. This area would provide around 1.9 hectares of land with its current use being a caravan park. The site has good connectivity with the beach front and the town centre. Development of a mixture of land uses within this locality would benefit from such proximity. The potential to use this site for a future town centre would need to be balanced with implications for the loss of affordable housing and low cost tourist accommodation.

The second area is located to the east of Middleton Street and south of Lawson Street. The land is currently vacant and approximately 2.2 hectares in size. Possible expansion of the town centre in this location, or development of other land uses, would connect the mixed use zoning to the east of Gilmore Crescent to the town centre, increasing its attractiveness for development. However, this parcel was excluded from the additional capacity analysis as it is currently disconnected from the centre, owned by Crown Lands and contains significant bio-diversity. Both areas are currently zoned for public recreation and rezoning is considered unlikely.

Alternatively, the additional demand could be accommodated within the existing town centre by increasing the permissible FSR in strategic locations. For example, a commercial core precinct could be developed where increased development is incentivised through increased FSR and height limits.

6.2.5 Suffolk Park retail centre

Suffolk Park centre town centre provides a total of 2,920sqm of floorspace. Of this total floorspace, around 1,275sqm is related to retail and commercial floorspace, of which there was no vacant floorspace as of 2017.

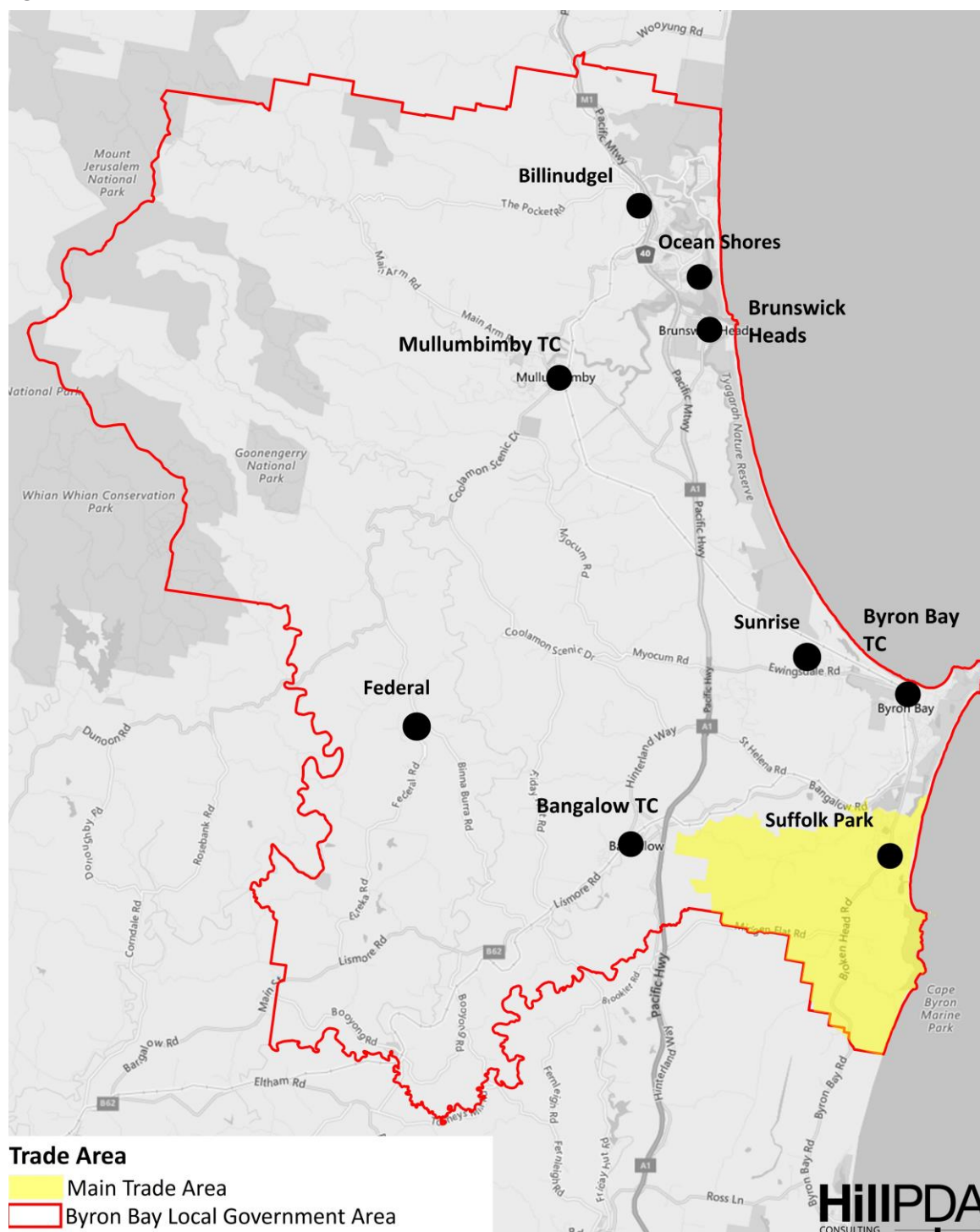
The centre contains a small Spar supermarket (500sqm) providing weekly and top up shopping for local residents, workers and visitors. The majority of the floorspace within the centre is attributed towards the Park Motel and accommodation which also contains a restaurant and bar. The remainder of the centre is comprised of nine stores totaling around 945sqm of floorspace, including a cafes, fitness gym, pharmacy, bakery, post office and liquor store.

The centre primarily provides top up shopping for the surrounding residents.

6.2.5.1 Suffolk Park centre trade area

Suffolk Park centre's trade area encompasses the surrounding suburbs and consequently, the surrounding centres of Byron Bay, Bangalow and Ballina restrict its trade area, being the primary locations for weekly and leisurely shopping. The lack of a full-line supermarket in Suffolk Park also restricts its trade area. However, the current population generated within this area does not warrant the provision of a large supermarket.

Figure 6-6: Suffolk Park centre trade area



Source: HillPDA2018

6.2.5.2 Resident population growth and total retail expenditure generated

The population within the MTA is projected to increase from around 4,052 residents in 2017 to around 4,710 residents by 2041, representing an increase of around 657 residents or 16% over the period. This is a significant increase in population for this small area and would have implications on the amount of floorspace demanded.

Table 6-30: Suffolk Park centre population projections

	2017	2021	2026	2031	2036	2041	Growth 17-41
MTA Total	4,052	4,195	4,272	4,446	4,514	4,709	657

Source: Anysite 2017, HillPDA

These residents are estimated to generate over \$59 million in retail expenditure in 2017 with this forecast to increase to around \$87 million by 2041, representing an increase of \$28 million or 47% over the period. Supermarket expenditure alone is projected to increase by \$9 million over the period, reaching an annual expenditure of around \$27 million by 2041.

Table 6-31: Total retail expenditure by retail store type - residents within MTA (\$2017)

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	18.6	20.0	21.4	23.4	25.0	27.4
Take-away Liquor Stores	2.2	2.3	2.5	2.7	2.9	3.2
Specialty Food Stores	2.2	2.3	2.5	2.7	2.9	3.2
Fast-Food Stores	2.7	2.9	3.1	3.4	3.6	3.9
Restaurants, Hotels and Clubs*	5.3	5.8	6.2	6.7	7.2	7.9
Department Stores	4	4.4	4.7	5.1	5.4	6.0
Apparel Stores	4.3	4.6	4.9	5.4	5.7	6.3
Bulky Goods Stores	9	9.6	10.3	11.3	12.0	13.2
Other Personal & Household Goods Retailing	8.7	9.3	10.0	10.9	11.6	12.8
Selected Personal Services**	2	2.1	2.3	2.5	2.6	2.9
Total	58.8	63.3	67.8	74.1	79.1	86.7

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) ** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

6.2.5.3 Capture rates

Suffolk Park centre is not expected to capture all of the retail expenditure generated within the MTA. For example the close proximity of Byron Bay and Ballina and town centres coupled with the type/quality of retail floorspace provided within the centre would significantly restrict the amount of expenditure captured within the centre. For this reason the following capture rates have been applied to the corresponding trade area.

Table 6-32: Suffolk Park centre trade area capture rates

Store type	PTA
Supermarkets & Grocery Stores	35%
Take-away Liquor Stores	25%
Specialty Food Stores	10%
Fast-Food Stores	10%
Restaurants, Hotels and Clubs	15%
Department Stores	0%
Apparel Stores	0%
Bulky Goods Stores	0%
Other Personal & Household Goods Retailing	0%
Selected Personal Services	5%

Source: HillPDA, 2018

6.2.5.4 Other expenditure sources

There were around 167 workers employed within and around Suffolk Park centre. These workers live outside the LGA and generated an additional \$0.4 million in retail expenditure in 2017, which was captured by the centre. This is forecast to increase to just over \$0.5 million by 2041.

6.2.5.5 Total retail expenditure captured by Suffolk Park centre

Applying the various capture rates and accounting for worker and visitor expenditure, it is estimated that retailers within Suffolk Park centre captured around \$8 million in retail expenditure in 2017 with this forecast to increase to around \$13 million by 2041.

Table 6-33: Total expenditure captured by Suffolk Park centre

Trade area and retail store type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	5.7	7.1	7.6	8.3	8.9	9.7
Take-away Liquor Stores	0.6	0.6	0.7	0.7	0.8	0.9
Specialty Food Stores	0.3	0.3	0.4	0.4	0.4	0.4
Fast-Food Stores	0.4	0.5	0.5	0.5	0.6	0.6
Restaurants, Hotels and Clubs	0.9	0.9	1.0	1.1	1.2	1.3
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.0	0.0	0.0	0.0
Bulky Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.0	0.0	0.0	0.0	0.0	0.0
Selected Personal Services	0.1	0.1	0.1	0.1	0.1	0.1
Total	8.0	9.6	10.2	11.2	11.9	13.0

Source: Anysite 2017, HillPDA

6.2.5.6 Retail floorspace demand

In order to determine the demand for retail floorspace, target turnover rates (\$/sqm of retail floorspace, and otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected retail expenditure drawn to the centre. These target turnover rates are broadly the rates at which retail development would experience strong trading conditions.

Using the target turnover rates identified below, the current demand for retail and commercial floorspace within the centre is estimated at around 1,240sqm, increasing to 1,600qm over the 24 year period to 2041.

Please note that given the centre is not a town centre and contains limited commercial space, HillPDA have only attributed a further demand for commercial floorspace at 10% of the demand for retail space.

Table 6-34: Demand for retail and commercial floorspace

YEAR	Target Rate*	2017	2026	2036	2041
Supermarkets & Grocery Stores	9,000	732	807	895	957
Take-away Liquor Stores	9,500	62	68	75	80
Specialty Food Stores	7,000	44	48	52	55
Fast-Food Stores	7,000	61	66	72	76
Restaurants, Hotels and Clubs	4,500	193	212	235	250
Clothing Stores	4,500	0	0	0	0
Bulky Goods Stores	3,000	0	0	0	0
Other Personal & Household Goods Retailing	4,000	0	0	0	0
Selected Personal Services	3,000	33	36	40	43
Total Retailing		1,125	1,237	1,370	1,462
Commercial floorspace demand (@ say 10%)**		113	124	137	146
Total floorspace demand		1,238	1,361	1,507	1,608

Source: HillPDA * Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies. Includes an allowance of Real Growth of 5%/ann in RTD in line with historic average. ** additional 10% of retail floorspace demand

6.2.5.7 Retail and commercial development pipeline

There are currently no developments proposed within Suffolk Park which include retail or commercial floorspace.

6.2.5.8 Floorspace supply versus demand

Currently the centre provides around 1,275sqm of retail and commercial floorspace. Our analysis reveals that the surrounding resident and worker population is likely to generate demand for around 1,240sqm of floorspace. This implies that the centre is currently in equilibrium with demand. However by 2041, without any further development, there would an undersupply of around 330sqm. This is a modest demand and could comprise three additional specialist shops of around 100sqm each.

Table 6-35: Floorspace under/oversupply

Category	Floorspace supply	Floorspace demand				Under/oversupply
		2017	2026	2036	2041	
Supermarkets & Grocery Stores	500	732	807	895	957	-457
Take-away Liquor Stores and speciality food	285	106	116	127	135	150
Fast-Food Stores	77	61	66	72	76	1
Restaurants, Hotels and Clubs	224	193	212	235	250	-26
Other specialties	77	33	36	40	43	34
Total Retailing	1,163	1,125	1,237	1,370	1,462	-299
Commercial floorspace	111	113	124	137	146	-35
Total floorspace	1,274	1,238	1,361	1,507	1,608	-334
Floorspace under/oversupply (-/+)		36	-87	-233	-334	

Source: HillPDA, 2018

6.2.5.9 The need for additional appropriately zoned land

Theoretical capacity

HillPDA, have assessed the theoretical floorspace capacity of the centre, through calculating the maximum development potential of each land parcel (land area x permitted FSR).

This methodology however has some limitations as it does not take into consideration the feasibility of redevelopment, current land uses mix current build form/floorspace or if the FSR can be achieved under the current permissible building height limit. As such, a more detailed feasibility assessment should be undertaken to assess the redevelopment potential of various land uses within the town centre.

Applying this methodology, Suffolk Park town centre has a theoretical floorspace capacity of around 4,685sqm. As of 2017, around 56% of the floorspace within the centre was other uses such as accommodation.

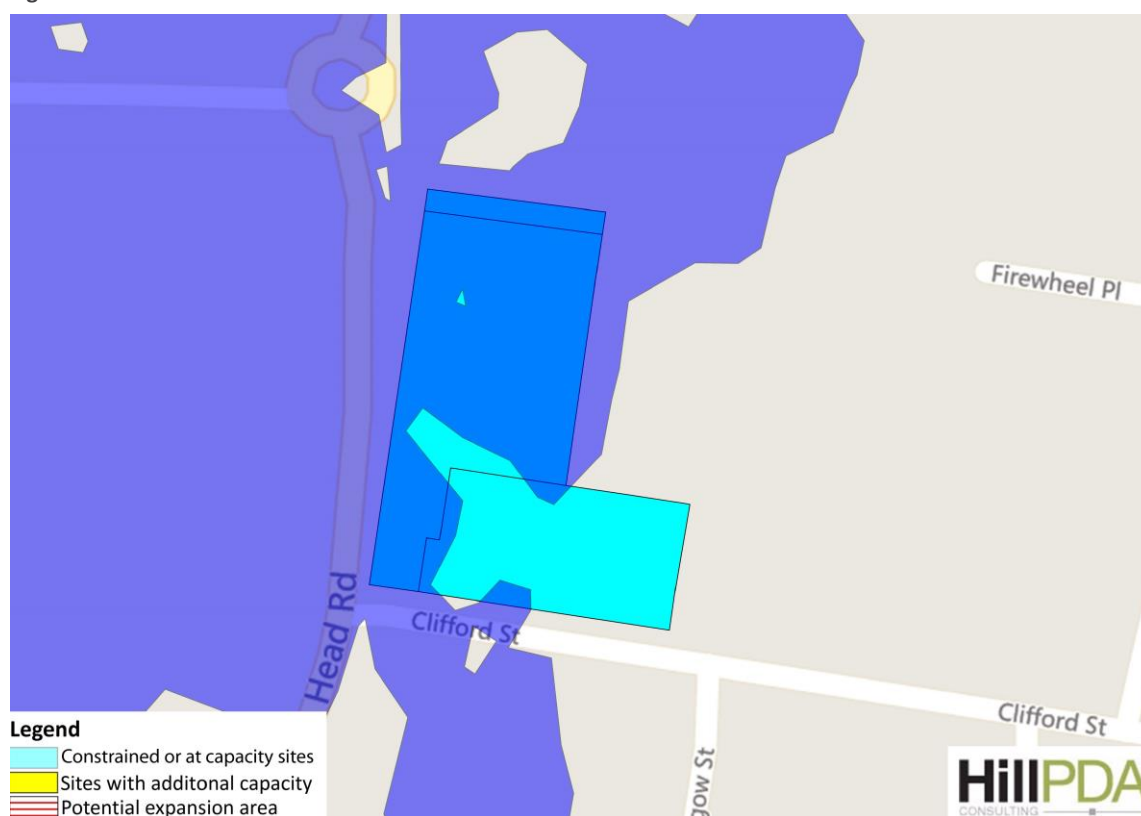
Applying this proportion to the theoretical development capacity leaves a residual 3,035sqm for retail and commercial floorspace. This theoretical capacity is sufficient to accommodate the forecast demand in retail and commercial floorspace over the next 24 years.

Constrained capacity

The expansion of the centre is constrained by flood prone land and surrounding residential uses. A possible centre expansion could occur onto 13 Clifford Street. However, the size and current residential uses could make the feasible redevelopment of this site for retail uses commercially unlikely.

As such, to accommodate the projected demand, an increase in planning controls, such as the FSR, from the current 0.5:1 to around 1:1 could be required for 3 Clifford Street. This may provide an incentive for redevelopment to accommodate additional floorspace, when demand and market drivers are sufficient.

Figure 6-7: Suffolk centre constraints



Source: HillPDA

6.2.6 Mullumbimby town centre

Mullumbimby town centre is the second largest centre within the LGA in terms of land size and floorspace. Of the 50,980sqm of floorspace in the centre, around 31,600sqm is related to retail and commercial floorspace, of which just under 1,090sqm or 3.4% was vacant. This low vacancy rate could indicate that there is limited space within the centre as typically a vacancy rate of 5% is seen a healthy rate to allow new tenants and existing tenants to relocate.

Of the retail and commercials space, 34% was attributed to commercial uses such as travel agents, medical uses, financial and legal services. Typically, around 30% of shop front space is occupied by such uses. The larger proportion of commercial floorspace could be explained by the local Council's chamber within the centre (around 4,100sqm).

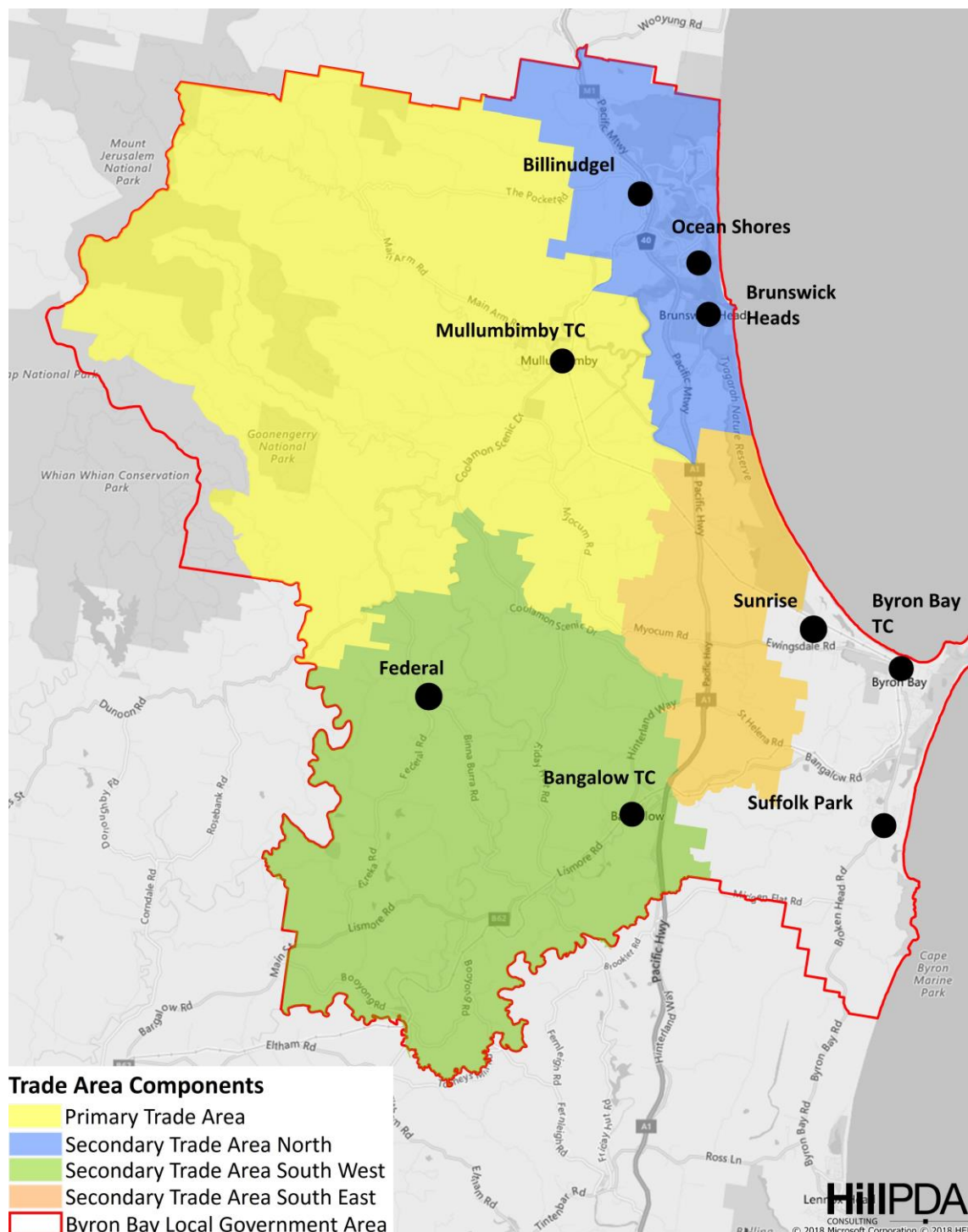
The centre contains a Woolworths and IGA supermarket with organic and fruit and vegetable stores which provide weekly and top-up shopping for local residents, workers and visitors.

6.2.6.1 Mullumbimby town centre trade area

Mullumbimby's MTA encompasses most of the LGA with the exception of the area around Byron Bay town centre and Suffolk Park. The development of a Woolworths supermarket in Mullumbimby is likely to significantly increase the attractiveness of the centre to local residents and surrounding communities.

Mullumbimby and Byron town centres are around equal driving time from Bangalow town centre. Due to traffic constraints in Byron Bay it is quite likely that many residents in Bangalow may undertake shopping (such as food, groceries, etc.) in Mullumbimby.

Figure 6-8: Mullumbimby town centre retail trade area



Source: HillPDA, 2018

6.2.6.2 Resident population growth and total retail expenditure generated

The population within the MTA is projected to increase from around 22,445 residents in 2017 to around 27,220 residents by 2041, representing an increase of around 4,780 residents or 21% over the period. The majority of this growth is projected to occur (60%) within the PTA, followed by the STA South West (23%).

Table 6-36: Mullumbimby town centre population projections

	2017	2021	2026	2031	2036	2041	Growth 17-41
PTA	7,763	8,135	8,833	9,156	9,737	10,617	2,854
STA - North	8,504	8,710	8,809	9,182	9,343	9,288	784
STA - South West	5,192	5,376	5,523	5,745	5,879	6,133	941
STA - South East	984	1,019	1,037	1,079	1,096	1,182	198
Total	22,443	23,240	24,202	25,162	26,055	27,220	4,777

Source: Anysite 2017, HillPDA

These residents are estimated to generate over \$298 million in retail expenditure in 2017 with this forecast to increase to around \$460 million by 2041, representing an increase of \$162 million or 54% over the period. Supermarket expenditure alone is projected to increase by \$52 million over the period, reaching an annual expenditure of around \$147 million by 2041.

Table 6-37: Total retail expenditure by retail store type - residents within MTA (\$2017)

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	95.1	102.8	112.5	122.9	133.7	146.9
Take-away Liquor Stores	10.3	11.1	12.2	13.3	14.4	15.9
Specialty Food Stores	11.2	12.1	13.2	14.4	15.7	17.2
Fast-Food Stores	13.7	14.8	16.2	17.7	19.3	21.2
Restaurants, Hotels and Clubs*	26.7	28.8	31.5	34.4	37.5	41.1
Department Stores	20.4	22.1	24.2	26.4	28.7	31.6
Apparel Stores	21.5	23.3	25.4	27.8	30.2	33.2
Bulky Goods Stores	45.1	48.8	53.4	58.3	63.4	69.7
Other Personal & Household Goods Retailing	43.5	47.0	51.4	56.2	61.1	67.1
Selected Personal Services**	9.9	10.7	11.7	12.8	14.0	15.3
Total	297.4	321.6	351.7	384.3	418.0	459.2

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) ** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected personal services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

6.2.6.3 Capture rates

Mullumbimby town centre is not expected to capture all of the retail expenditure generated within the MTA. For example, the STA North includes the Ocean Shores shopping centre which contains a Coles supermarket and the majority of supermarket expenditure from STA North residents would be directed towards Ocean Shores and Brunswick Heads town centre.

For this reason the following capture rates have been applied to the corresponding trade area.

Table 6-38 : Mullumbimby town centre trade area capture rates

Store type	PTA	STA North	STA South West	STA South East
Supermarkets & Grocery Stores	80%	35%	25%	10%
Take-away Liquor Stores	75%	25%	10%	5%
Specialty Food Stores	75%	30%	25%	5%
Fast-Food Stores	75%	35%	25%	5%
Restaurants, Hotels and Clubs	35%	20%	25%	5%
Department Stores	0%	0%	0%	0%
Apparel Stores	55%	30%	20%	10%
Bulky Goods Stores	15%	10%	10%	10%
Other Personal & Household Goods Retailing	60%	25%	15%	8%
Selected Personal Services	70%	25%	15%	5%

Source: HillPDA

6.2.6.4 Other expenditure sources

HillPDA estimated that there were around 523 workers in Mullumbimby town centre that lived outside of the LGA in 2016. These workers generated an additional \$1.4 million in retail expenditure in 2017 which was captured by the centre. This is forecast to increase to just over \$1.9 million by 2041.

In 2017 it is estimated that the centre also captured \$17 million in tourism and visitor retail expenditure, with this increasing to around \$38 million by 2041.

6.2.6.5 Total retail expenditure captured by Mullumbimby town centre

Applying the various capture rates and accounting for worker, visitor expenditure, it is estimated that retailers within Mullumbimby town centre captured around \$114 million in retail expenditure in 2017 with this forecast to increase to around \$194 million by 2041.

Table 6-39: Total expenditure captured by Mullumbimby town centre

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	45.5	49.8	55.4	60.7	66.8	74.6
Take-away Liquor Stores	6.5	7.5	8.5	9.6	10.7	12.2
Specialty Food Stores	6.7	7.5	8.5	9.4	10.4	11.8
Fast-Food Stores	9.9	11.2	12.7	14.2	15.8	17.9
Restaurants, Hotels and Clubs	12.1	13.9	15.8	17.8	19.7	22.5
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	9.1	10.1	11.4	12.6	13.9	15.7
Bulky Goods Stores	5.2	5.7	6.3	6.8	7.5	8.3
Other Personal & Household Goods Retailing	14.3	15.6	17.3	18.9	20.8	23.2
Selected Personal Services	4.4	4.9	5.6	6.2	6.8	7.8
Total	113.8	126.1	141.4	156.3	172.4	193.9

Source: AnySite 2017, HillPDA

6.2.6.6 Retail floorspace demand

In order to determine the demand for retail floorspace, target turnover rates (\$/sqm of retail floorspace, and otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected retail expenditure drawn to the centre. These target turnover rates are broadly the rates at which retail development would experience strong trading conditions.

Using the target turnover rates identified below, the current demand for retail and commercial floorspace within the centre is estimated at around 25,500sqm, increasing to 38,575sqm over the 24 year period to 2041.

Table 6-40: Demand for retail and commercial floorspace

YEAR	Target Rate*	2017	2026	2036	2041
Supermarkets & Grocery Stores	9,000	5,058	5,886	6,747	7,350
Take-away Liquor Stores	9,500	688	857	1,021	1,139
Specialty Food Stores	7,000	956	1,157	1,357	1,499
Fast-Food Stores	7,000	1,407	1,731	2,047	2,272
Restaurants, Hotels and Clubs	4,500	2,692	3,349	3,991	4,443
Clothing Stores	4,500	2,023	2,415	2,813	3,089
Bulky Goods Stores	3,000	1,750	1,996	2,265	2,442
Other Personal & Household Goods Retailing	4,000	3,577	4,140	4,729	5,143
Selected Personal Services	3,000	1,474	1,776	2,077	2,294
Total retailing		19,625	23,307	27,045	29,672
Commercial floorspace demand (@ say 30%)**		5,887	6,992	8,114	8,902
Total floorspace demand		25,512	30,299	35,159	38,573

Source: HillPDA * Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies. Includes an allowance of Real Growth of 5%/annum in RTD in line with historic average.** additional 30% of retail floorspace demand

6.2.6.7 Retail and commercial development pipeline

There is currently one development in Mullumbimby town centre that has been granted development approval. The development at 35-37 Burringbar Street, Mullumbimby is for alterations and additions to an existing commercial building to create a day spa and cafe. The project is scheduled to commence in November of 2018 with completion in June of 2019.

Currently the premise contains three uses these being a hair dresser, book shop and acupuncture service with a combined GFA of around 235sqm. The conversion of this floorspace to other retail and commercial uses is not expected to significantly impact the supply of floorspace within the centre, more just changing the type of uses.

6.2.6.8 Floorspace supply versus demand

Currently Mullumbimby town centre provides around 31,600sqm of retail and commercial floorspace. Modelling reveals that the surrounding resident, worker and visitor population is likely to generate demand for around 25,435sqm of floorspace. This means that there is a current oversupply of floorspace of around 6,165sqm in the centre.

However, as stated previously, the Council Chambers are located within the centre in a building with an estimated GFA of around 4,100sqm. The location of Council offices in Mullumbimby promotes the administration profile and employment generation within the centre.

Allowing for this floorspace from the supply side reduces the oversupply to around 2,000sqm. However, over the coming years, with the growth in the surrounding population and worker/visitor expenditure, this oversupply is likely to convert to an undersupply of around 11,460sqm by 2041 (excluding Council chambers).

Regarding supermarket floorspace, the centre currently contains a Woolworths and IGA supermarket providing a combined area of approximately 3,900sqm. The centre also contains some smaller supportive grocery and organic stores providing a combined 650sqm. By 2041, there is likely to be a demand for an additional 2,800sqm of supermarket and grocery store floorspace. This is sufficient for the provision of a smaller supermarket of around 1,000 to 2,000sqm such as an ALDI or similar style supermarket format. Demand for a supermarket of around 1,500sqm would become sufficient around 2028.

Currently the centre has a low vacancy rate of around 3.5%. This low vacancy rate coupled with its equilibrium with demand could indicate that additional space is required to reduce undersupply.

This demand for increased supply could be evident in commercial tenants occupying residential dwellings along Stuart Street between Burringbar Street and Tincogan Street. A possible future expansion of the centre within this location could be explored to increase the capacity of the centre, alleviating competition for space and rent increases.

Table 6-41: Floorspace under/oversupply

Category	Floorspace supply	Floorspace demand				Under/oversupply
	2017	2017	2026	2036	2041	
Supermarkets & Grocery Stores	4,489	5,058	5,886	6,747	7,350	-2,861
Take-away Liquor Stores & specialty food	758	1,643	2,014	2,377	2,639	-1,880
Fast-Food Stores	631	1,407	1,731	2,047	2,272	-1,641
Restaurants, Hotels and Clubs	1,302	2,692	3,349	3,991	4,443	-3,141
Clothing Stores	1,566	2,023	2,415	2,813	3,089	-1,523
Bulky Goods Stores	4,402	1,750	1,996	2,265	2,442	1,960
Selected Personal Services	1,388	1,474	1,776	2,077	2,294	-905
Other specialties	5,147	3,577	4,140	4,729	5,143	4
Total retailing	19,685	19,625	23,307	27,045	29,672	-9,987
Commercial floorspace	6,737	5,887	6,992	8,114	8,902	-2,165

Vacant floorspace	1,088					
Total floorspace	27,510	25,512	30,299	35,159	38,573	-11,064
Floorspace under/oversupply (-/+)		1,997	-2,790	-7,649	-11,064	

Source: HillPDA, *excludes council chambers of around 4,100sqm

6.2.6.9 The need for additional appropriately zoned land

Theoretical capacity

HillPDA, have assessed the theoretical floorspace capacity of the centre, through calculating the maximum development potential of each land parcel (land area*permitted FSR).

This methodology has some limitations. As an example, it does not take into consideration the feasibility of redevelopment, current land uses mix current build form/floorspace or if the FSR can be achieved under the current permissible building height limit. A more detailed feasibility assessment should be undertaken to assess the redevelopment potential of various land uses within the town centre. Applying this methodology to Mullumbimby town centre has a theoretical floorspace capacity of 72,395sqm. As of 2017, around 65% of the floorspace within the centre was other uses such as accommodation, residential, recreation fitness and other uses.

Applying this proportion to the theoretical development capacity leaves a residual of 52,125sqm for retail and commercial floorspace. This theoretical capacity is sufficient to accommodate the forecast demand in retail and commercial floorspace over the next 24 years.

Constrained capacity

The constrained capacity analysis removes constrained properties or land parcels to provide a more precise estimate as to the actual capacity in the centre.

The map below provides an overview with the parcels identified that accommodate additional capacity within the centre.

Figure 6-9: Mullumbimby town centre constrained capacity



Source: HillPDA

The capacity analysis removes constrained properties, which have already been developed to their maximum potential, to provide a more precise estimate as to the actual supply in the centre. The following figure identifies 33 properties (20,800sqm land area) with additional development capacity. The theoretical capacity (land area x FSR) of these 33 properties is around 17,400sqm GFA.

Considering the above, an additional 7,748sqm (residual capacity) of floorspace could be needed within the centre, revealing a shortage of around 3,714sqm. It is unlikely, however, that the entirety of the additional floorspace would be developed as retail/commercial space. Therefore, assuming that a conservative 30% of the residual floorspace is directed towards non retail/commercial uses, results in a higher deficit scenario of around 8,960sqm. Assuming an FSR of 0.75:1 and allowing for an additional 30% capacity, an additional 0.4 to 1.4 hectares of land would be required to accommodate the projected deficit scenario.

Table 6-42: Mullumbimby town centre additional land requirements

(a) 33 properties land area (sqm)	(b) Existing floorspace (sqm)	(c) Total theoretical capacity [(a) x FSR]	(d) Residual capacity [(c)-(b)]	(e) Demand	(f) Deficit (sqm) [(d)-(e)]	Land required (sqm) [((f)/0.75)] Land required (ha)	Land required (ha)* (g)/10,000
23,813	9,632	17,380	7,748	11,064	-3,316 to -8,960*	- 4,420 to -11,946*	0.4 to 1.4

Source: HillPDA *assumes an FSR of 0.75:1 and additional capacity of 30% - higher projection also includes a proportion of floorspace developed as non-retail/commercial uses

Two possible areas for expansion of the town centre have been identified. The first area is located just south of Tincogan Street and would provide an area of around 0.8 hectares. This location is predominantly low density residential dwellings with some premises already containing commercial uses. Future retail and commercial uses within this area could benefit from the proximity to the Woolworths supermarket, existing car parking areas and Mullumbimby medical centre along Sturt Street.

The second area is an extension of the town centre southward between Sturt and Station Street. This area is 1.2 hectares in size and is comprised of low density residential buildings. Future retail and commercial uses within this area could benefit from the proximity to existing retail and commercial uses, existing car park and community uses.

It must be noted that the two expansion areas identified are within a heritage conversation area and further consideration as to the redevelopment potential within the areas is required. Alternatively, increasing FSR in strategic areas could increase the town capacity as demand increases.

6.2.7 Ocean Shores, Brunswick Heads, Bayside and Billinudgel Village centres

Ocean Shores, Brunswick Heads, Bayside and Billinudgel Village centres are within close proximity to each other and have overlapping trade areas. For this reason HillPDA, have applied a single trade area for the centres to project the demand for retail and commercial space.

Combined these centres provide around 51,270sqm of floorspace of which 25,385sqm was attributed to retail or commercial space. Of this around 18,510sqm is attributed to retail and 4,950sqm is commercial floorspace, and an additional 1,925sqm or 7.6% was vacant. It is worth noting that of the total floorspace contained within the centres, a significant proportion (34%) is residential floorspace.

Brunswick Heads town centre is the largest of the four centres providing 14,515sqm of retail/commercial space. Of this, around 10,190sqm is retail and 2,885sqm is commercial space. The remaining 1,438sqm was vacant, giving the centre a high vacancy rate of 10%. Typically a vacancy rate of 4%-5% is considered healthy for a centre. The high vacancy rate of the centre implies underperformance.

The centre also contains a small IGA supermarket of around 370sqm, the majority of supermarket expenditure would be directed towards Ocean Shores or Mullumbimby town centre. The centre does contain some restaurants and cafes catered towards visitors to the centre with the pub also acting as an anchor to the centre.

Ocean Shores centre provides 8,720sqm of retail/commercial space. Of this, around 7,170 is retail and 1,310sqm is commercial space. The remaining 240sqm is vacant, resulting in a vacancy rate of 2.8%. This low vacancy rate, compared to the other centres in the locality indicates that its performance is good.

Ocean Shores contains a large Coles supermarket (~2,100sqm) and a Target Country discount department store (~1,980sqm). These two anchor stores contribute to the attractiveness of the centre with other stores benefiting from increased passing trade.

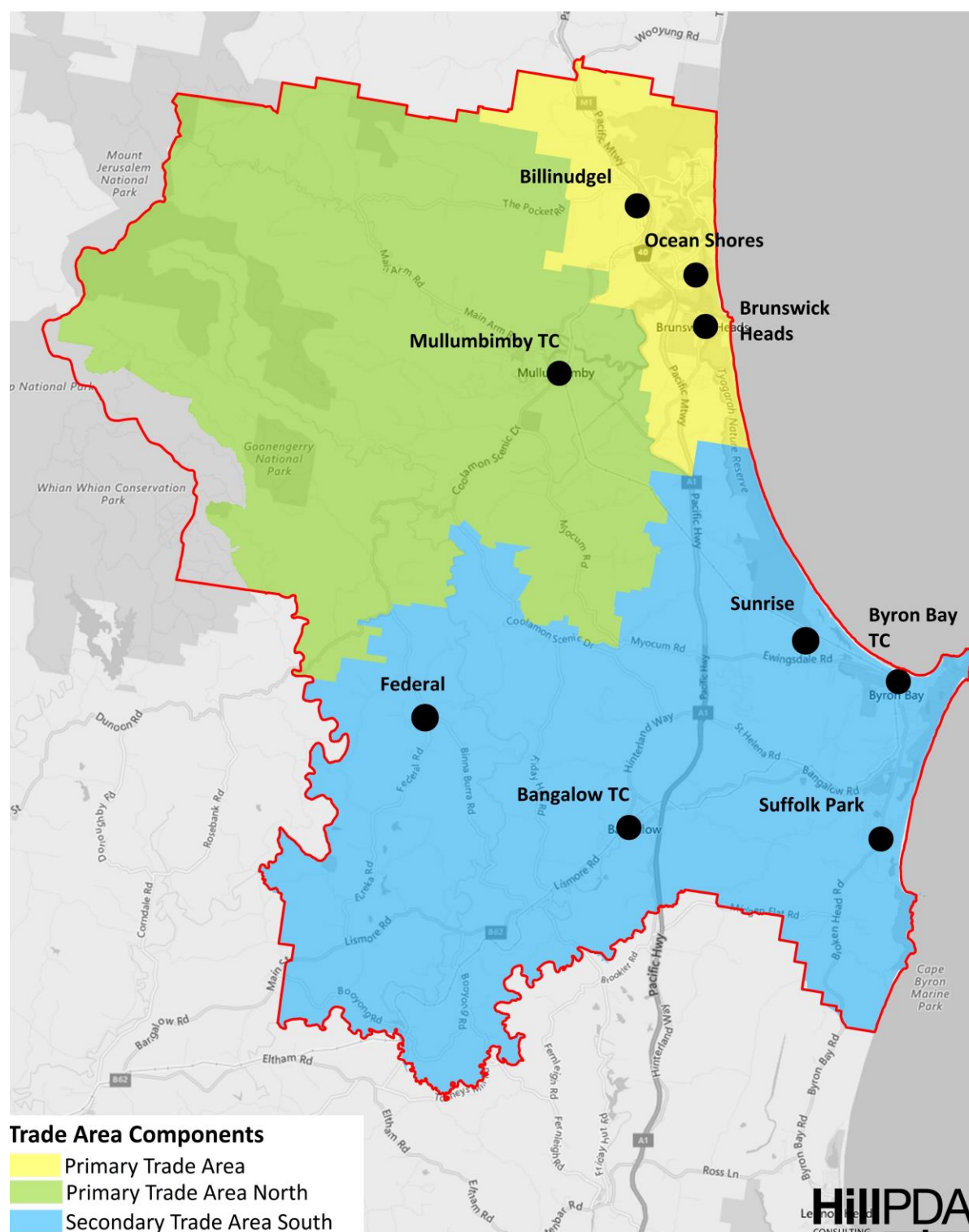
Billinudgel Village primarily caters for the immediate surrounding residential and worker population within the industrial estate. The Village provides around 2,150sqm of retail/commercial space. Of this, around 1,150sqm is retail and 750sqm is commercial space. The remaining 245sqm was vacant, resulting in a vacancy rate of 11.4%. This high vacancy rate compared to the other centres could indicate an underperforming centre.

Bayside is currently vacant land. It will be developed in line with demand as the surrounding residential population increases.

6.2.7.1 Trade areas

The centres PTA encompass the suburbs and residents on the coast line from Brunswick Heads to Wooyung. Given that Ocean Shores contains a Coles supermarket (the only one within the local area), the centre would draw some trade from Mullumbimby. A Target Country is also present within Ocean Shores, as such a STA South has been defined extending southwards towards Bangalow and Suffolk Park.

Figure 6-10: Trade area components



Source: HillPDA

6.2.7.2 Resident population growth and total retail expenditure generated

The population within the MTA is projected to increase from just 32,725 residents in 2017 to around 43,635 residents by 2041, representing an increase of around 6,900 residents or 21% over the period. The majority of this growth (41%) is projected to occur in the Secondary Trade Area North, followed by the STA South (47%).

Table 6-43: Population projections

	2017	2021	2026	2031	2036	2041	Growth 17-41
PTA	8,504	8,710	8,809	9,182	9,343	9,288	784
STA - North	7,763	8,135	8,833	9,156	9,737	10,617	2,854
STA - South	16,422	17,005	17,608	18,312	18,870	19,684	3,262
Total	32,689	33,850	35,250	36,650	37,950	39,589	6,900

Source: AnySite 2017, HillPDA

These residents are estimated to generate over \$440 million in retail expenditure in 2017. This is forecast to increase to \$678 million by 2041, representing an increase of \$239 million or 54% over the period. Supermarket expenditure alone is projected to increase by \$76 million over the period, reaching an annual expenditure of around \$263 million.

Table 6-44: Total retail expenditure by retail store type - residents within MTA (\$2017)

Trade Area and Retail Store Type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	139.5	151.0	165.3	180.6	196.5	215.5
Take-away Liquor Stores	15.6	16.9	18.5	20.2	21.9	24.1
Specialty Food Stores	16.3	17.6	19.3	21.1	23.0	25.2
Fast-Food Stores	20.2	21.8	23.9	26.1	28.4	31.1
Restaurants, Hotels and Clubs*	39.7	42.9	47.0	51.3	55.8	61.2
Department Stores	30.2	32.7	35.8	39.1	42.5	46.6
Apparel Stores	31.8	34.4	37.6	41.1	44.7	49.0
Bulky Goods Stores	66.8	72.3	79.1	86.4	94.0	103.1
Other Personal & Household Goods Retailing	64.4	69.7	76.3	83.3	90.7	99.4
Selected Personal Services**	14.7	15.9	17.4	19.1	20.7	22.7
Total	439.1	475.2	520.0	568.2	618.2	677.9

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) ** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

6.2.7.3 Capture rates

The centres are not expected to capture all of the retail expenditure generated within the MTA. For example, some of the supermarket expenditure would be directed towards Mullumbimby town centre which contains a large Woolworth supermarket. For this reason the following capture rates have been applied to the corresponding trade area.

Table 6-45: Trade area capture rates

Store type	PTA	STA North	STA South
Supermarkets & Grocery Stores	60%	15%	0%
Take-away Liquor Stores	65%	15%	0%
Specialty Food Stores	45%	5%	0%
Fast-Food Stores	30%	10%	0%
Restaurants, Hotels and Clubs	40%	10%	0%
Department Stores	30%	30%	20%
Apparel Stores	30%	10%	0%
Bulky Goods Stores	5%	5%	0%
Other Personal & Household Goods Retailing	40%	5%	0%
Selected Personal Services	40%	0%	0%

6.2.7.4 Other expenditure sources

HillPDA have estimated that there were around 152 workers that worked in and around the centres which also lived outside of the LGA. These workers generated an additional \$0.4 million in retail expenditure in 2017 which was captured by the centre. This is forecast to increase to just over \$0.6 million by 2041.

In 2017, it is estimated that the centre also captured \$21 million in tourism and visitor retail expenditure, with this increasing to around \$48 million by 2041.

6.2.7.5 Total retail expenditure captured by centres

Applying the various capture rates and accounting for worker and visitor expenditure, it is estimated that retailers within the centres captured around \$79 million in retail expenditure in 2017, with this forecast to increase to around \$132 million by 2041.

Table 6-46 : Total expenditure captured by centres

Trade Area and retail store type	2017	2021	2026	2031	2036	2041
Supermarkets & Grocery Stores	29.4	32.2	35.2	39.0	42.5	46.2
Take-away Liquor Stores	7.2	8.3	9.5	10.9	12.1	13.8
Specialty Food Stores	5.2	6.1	6.9	8.0	8.8	10.1
Fast-Food Stores	4.2	4.8	5.5	6.2	6.9	7.8
Restaurants, Hotels and Clubs	10.1	11.6	13.2	15.0	16.7	18.9
Department Stores	7.4	8.0	8.8	9.6	10.5	11.5
Apparel Stores	3.0	3.2	3.5	3.8	4.1	4.4
Bulky Goods Stores	1.5	1.7	1.8	2.0	2.2	2.4
Other Personal & Household Goods Retailing	8.0	8.7	9.5	10.5	11.4	12.3
Selected Personal Services	2.5	2.8	3.1	3.6	3.9	4.4
Total	78.5	87.5	97.1	108.7	119.0	131.7

Source: AnySite 2017, HillPDA

6.2.7.6 Retail floorspace demand

In order to determine the demand for retail floorspace, target turnover rates (\$/sqm of retail floorspace, and otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected retail expenditure drawn to the centre. These target turnover rates are broadly the rates at which retail development would experience strong trading conditions.

Using the target turnover rates identified in Table 6-47, the current demand for retail and commercial floorspace within the area is estimated at around 15,500sqm, increasing to 23,000sqm over the 24 year period to 2041.

Table 6-47: Demand for retail and commercial floorspace

YEAR	Target Rate*	2017	2026	2036	2041
Supermarkets & Grocery Stores	9,000	3,265	3,741	4,290	4,551
Take-away Liquor Stores	9,500	753	957	1,158	1,289
Specialty Food Stores	7,000	744	947	1,146	1,275
Fast-Food Stores	7,000	599	748	896	991
Restaurants, Hotels and Clubs	4,500	2,236	2,801	3,366	3,725
Department Stores	3,000	2,479	2,810	3,182	3,403
Clothing Stores	4,500	667	741	834	871
Bulky Goods Stores	3,000	514	585	666	712
Other Personal & Household Goods Retailing	4,000	1,995	2,262	2,583	2,717
Selected Personal Services	3,000	827	1,003	1,188	1,291
Total Retailing		14,080	16,595	19,309	20,827
Commercial floorspace demand (@ say 10%)**		1,408	1,660	1,931	2,083
TOTAL FLOORSPACE DEMAND		15,488	18,255	21,240	22,910

Source: HillPDA * Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies. Includes an allowance of Real Growth of 5%/ann in RTD in line with historic average.** additional 10% of retail floorspace demand

6.2.7.7 Retail and commercial development pipeline

There is currently no development within the pipeline that would increase the amount of commercial or retail floorspace within the identified centres.

6.2.7.8 Floorspace supply versus demand

Currently the MTA's centres provide around 25,525sqm of retail and commercial floorspace. HillPDA's analysis reveals that the surrounding resident, worker and visitor population is likely to generate demand for around 15,500sqm of floorspace. This means that there is a current oversupply of floorspace of around 9,900sqm within the MTA. This oversupply is projected to decrease to around 2,475sqm by 2041 as the surrounding resident population, worker and visitor expenditure increases.

The high vacancy rates within Brunswick Heads and Billinudgel Village imply that these centres are underperforming. Ocean Shores is likely the stronger of the centres with a lower vacancy rate and two anchor tenants (Country Target and Coles supermarket) increasing the attractiveness of the centre and passing trade for its other occupants. Given that this centre is performing well and contains a good mix of tenants it should be supported as the premier centre within the MTA.

Billinudgel Village is likely to be underperforming given the high vacancy rate. The centre is severing the immediate resident population in the MTA west of the Pacific Hwy and the industrial estate to the north. Expansion of this area is unlikely in light of low population growth. Possible retraction and rezoning of the centre could be explored.

Brunswick Heads also serves the daily convenience needs of its immediate resident population. The centre caters for visitors with cafes and restaurants and other personal goods retailing. Strategies to increase its attractiveness to tourists should be explored. Alternatively, a possible contraction of the centre to create a denser core between Tweed Street and Brunswick Terrace could be explored.

In light of this forecast in demand it is likely that Bayside would remain vacant for the foreseeable future unless the surrounding population significantly increases.

Table 6-48: Floorspace under/oversupply

Category	Floorspace supply 2017	Floorspace demand				Under/oversupply
		2017	2026	2036	2041	
Supermarkets & Grocery Stores	2,469	3,265	3,741	4,290	4,551	-2,082
Take-away Liquor Stores and specialty food	1,808	1,498	1,904	2,304	2,564	-756
Fast-Food Stores	446	599	748	896	991	-545
Restaurants, Hotels and Clubs	3,328	2,236	2,801	3,366	3,725	-397
Department/ Discount Stores	1,980	2,479	2,810	3,182	3,403	-1,423
Clothing Stores	2,045	667	741	834	871	1,174
Bulky Goods Stores	1,305	514	585	666	712	593
Selected Personal Services	1,160	1,995	2,262	2,583	2,717	-1,557
Other specialties	3,968	827	1,003	1,188	1,291	2,677
Total retailing	18,510	14,080	16,595	19,309	20,827	-2,317
Commercial floorspace demand (@ say 10%)	4,949	1,408	1,660	1,931	2,083	2,866
Vacant floorspace	1,926					
Total floorspace demand	25,385	15,488	18,255	21,240	22,910	2,475
Floorspace under/oversupply (-/+)		9,897	7,130	4,145	2,475	

Source: HillPDA, 2018

6.2.7.9 The need for additional appropriately zoned land

Theoretical capacity

HillPDA have assessed the theoretical floorspace capacity of the centre, through calculating the maximum development potential of each land parcel (land area*permitted FSR). This methodology has some limitations as it does not take into consideration the feasibility of redevelopment, current land uses mix current build form/floorspace or if the FSR can be achieved under the current permissible building height limit. As such, a more detailed feasibility assessment should be undertaken to assess the redevelopment potential of various land uses within the town centre. However, applying this methodology, the combined centres have a theoretical floorspace capacity of 73,265sqm. As of 2017, around 50% of the floorspace within the centres was other uses such as accommodation, residential, recreation fitness and other uses.

Applying this proportion to the theoretical development capacity leaves a residual 36,635sqm for retail and commercial floorspace. This theoretical capacity is sufficient to accommodate the forecast demand in retail and commercial floorspace over the next 24 years.

Table 6-49: Theoretical capacity by centre

Centre	Total centre floorspace	Commercial/retail floorspace component	Theoretical capacity	Additional capacity (50% to retail/commercial)
Ocean shores	8,721	8721	20,158	10,079
Brunswick heads	39,250	14654	44,210	22,105
Billinudgel Village	3,574	2149	6,762	3,381
Bayside	0	0	2,135	1,068
Total	51,545	25,524	73,266	36,633

Source: HillPDA, 2018

6.2.7.10 Constrained capacity

Although there is an oversupply of floorspace within the main trade area and as such limited demand for additional capacity, HillPDA have undertaken a constrained scenario for the identified centres.

Ocean shores could accommodate an additional 8,272sqm although redevelopment within the centre would require replacement parking with underground or rooftop parking. However, the costs associated with providing such parking services could reduce the viability of redevelopment within the centre.

There are also limited expansion opportunities for the centre as it is surrounded by residential uses, Church owned land and Marshalls Creek. If the surrounding residential population increases over that projected, this could further increase demand for retail and commercial services within the main trade area, incentivising redevelopment of the centre.

Under the existing planning controls, Brunswick Heads has the capacity to accommodate an additional 5,611sqm of floorspace. However, in light of the previous demand modelling, this would unlikely be realised. Considering this, there is opportunity to consolidate the spatial extent of the centre but the relocation of the centre's main anchors such as the IGA would need to be accomplished. Alternatively, planning controls could be adjusted to encourage live/work arrangements in the B4 Mixed Use zone.

Billinudgel centre properties are flood prone or heritage items and as such were excluded from the constrained capacity scenario.

Bayside centre is currently a vacant site and hence has capacity for development, if the surrounding population significantly increases.

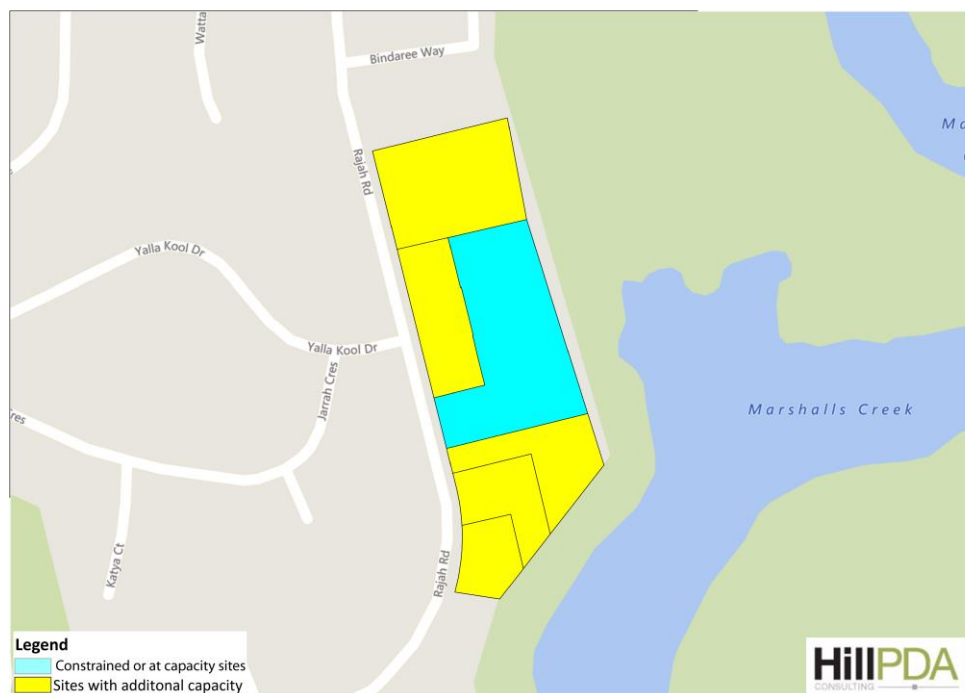
Table 6-50: Additional capacity, constrained scenario by centre

Centre	Number of properties	Area (sqm)	Existing floorspace (sqm)	Total theoretical capacity	Residual additional capacity
Ocean Shores	5	17,721	5,019	13,291	8,272
Brunswick heads	10	11,678	2,264	7,875	5,611
Billinudgel	0	0	0	0	0
Bayside	1	4,271	0	2,135	2,135
Total	32	38,291	10,021	28,012	17,991

Source: HillPDA

The following map highlights the sites within Ocean Shores that could accommodate additional capacity.

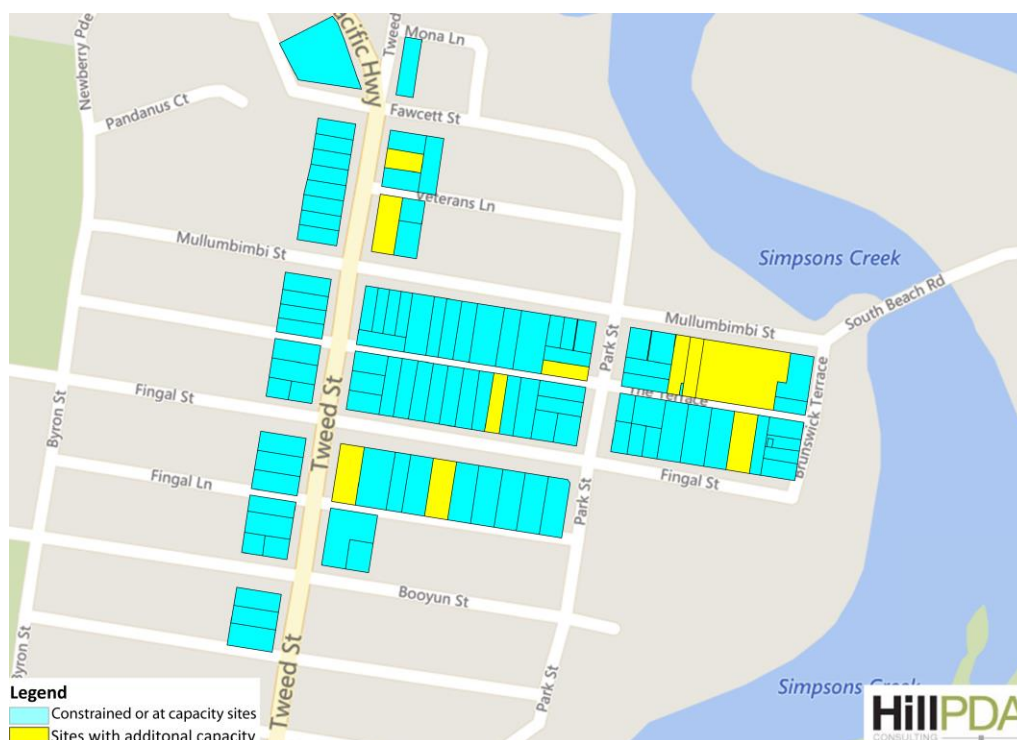
Figure 6-11: Ocean Shores additional capacity



Source: HillPDA, 2018

The following map highlights the sites within Brunswick Heads town centre that could accommodate additional capacity.

Figure 6-12: Brunswick heads town centre additional capacity



Source: HillPDA, 2018

7.0 SITE SUITABILITY PRINCIPLES

There are a number of locational and environmental factors that influence the suitability of land for employment related uses. The profile of the infrastructure, site and technology requirements for different types of businesses will help guide decisions on future locations for centres and employment precincts. Business requirements vary between centres and employment precincts as their function, amenity impacts and customer base varies. Generally, requirements include:

- Land availability – the pipeline of appropriately zoned land (or floor area) for rent or sale at a viable price that are of an adequate scale with limited environmental, amenity or planning constraints
- Access infrastructure –reliable road, rail and active transport networks
- Communication infrastructure –high speed internet connections and phone network coverage
- Essential services –infrastructure such as water and wastewater services, sewerage and electricity
- Support services –community infrastructure such as child care and health facilities
- Agglomeration – similar business types providing the opportunity growth of clusters.

Table 7-1 below provides an overview of the suitability principles to be considered for employment precincts and centres.

Table 7-1: Suitability principles for employment precincts and centres

Principles	Employment precincts	Business centres
Land availability	A key requirement for business in an employment precinct is the availability of suitable sites for acquisition or lease. Factors affecting the suitability of site or space can relate to the: - Quantum of land or space available for rent / purchase on the market at any given time - Affordability of the site from a sale or rent perspective - Appropriateness of zoning and planning controls to facilitate the business requirements - The scale of the site and its suitability for the needs of a given industry (i.e. sufficient building floor space, car parking, loading area etc.) - Proximity of sensitive receivers - Constraints to developing the site including flooding, strategic agricultural land and ecological sensitivity.	The availability and suitability of sites for tenants or development is an important resource for the growth and expansion of centres. Factors affecting the suitability of site or space can relate to the: - Quantum of land or floor area on the market for rent or purchase - Appropriateness of zoning and planning controls to facilitate the business requirements - Affordability of the site from a sale or rent perspective - Challenge of acquiring and consolidating sites, particularly in centres where land is in fragmented ownership. The process of consolidating sites in a centre can prove a risky and costly exercise where land may need to be bought with a premium. - Centres location and its broader trade catchment area - Design and layout of existing buildings - The number and type of competing businesses within the area - The existing identity and amenity of a centre - Constraints to development including flooding, heritage etc.
Access infrastructure	The provision of road infrastructure is a key determining factor for many businesses within employment precincts. The accessibility of a site or area is important for two key reasons being: - The movement of goods to and from the business - The ability for staff, customers or clients to access	A town centre relies on infrastructure for access for two key reasons: - To facilitate the access of goods and servicing - To facilitate the access of customers, clients and staff.

Principles	Employment precincts	Business centres
	the business. Transport infrastructure requirements include: • Efficient access to major arterial and motorway infrastructure (such as Pacific Motorway) • Sufficient road dimensions to facilitate heavy vehicle movement • Loading zones and docks • Car parking for customers and employees • Minimal road sharing between heavy vehicles and light vehicles • Public and active transport networks for employees. The importance of maintaining accessibility in and out of employment precincts with minimal conflict with residential traffic is essential to reduce traffic safety issues and protect distribution efficiencies.	Transport infrastructure requirements include: • Sufficient service-ways, loading docks, turning and storage areas as well as pullover or delivery parking bays • Convenient and unhindered access through the day and during potential evening periods (when centres are less congested) without conflicting the operation or amenity of surrounding uses • Public and active transport networks to allow employees and customers to access businesses • Road network to transport goods and services and access for employees and customers.
Communication infrastructure	• The provision of communications infrastructure (ADSL broadband, mobile phone services and main line connections) are increasingly vital to the successful operations of businesses (particularly new online retail platforms that are manufacturing and distributing from employment precincts) • Businesses require communication infrastructure to liaise with clients, undertake research, order goods and products or to sell / export goods and products	• The provision of communications infrastructure (ADSL broadband, mobile phone services and main line connections) are increasingly vital to the successful operations of businesses • Businesses require communication infrastructure to liaise with clients, undertake research, order goods and products or to sell / export goods and products
Essential services	• Provision of appropriate infrastructure such as water and wastewater services, sewerage and electricity • The need to provide essential services to a site (particularly in greenfield or expansion areas) can be cost prohibitive to some businesses, driving them to look in alternate local government areas to establish or expand their business • There is land available for expansion in Bangalow Industrial, Mullumbimby employment precinct and West Byron. This land, is zoned, but missing the essential infrastructure connections and appropriate subdivision to encourage take-up.	• Services such as water, electricity and sewerage are essential for business centres. As centres in the LGA are established, these essential services are already provided. • It is important to note however that development that increases density within centres, particularly higher density residential uses, may place greater strain on existing service related infrastructure. This will require the monitoring of existing service capacity and regular correspondence between planning approval authorities and service providers to ensure that utilities and infrastructure are capable of meeting anticipated demand.
Support services	• Provision of local services such as childcare, doctors, retail services etc. to support workers that are increasingly time poor.	• Provision of local services such as childcare, doctors, retail services etc. to support workers that are increasingly time poor.
Local workforce	The availability of a suitably skilled, local labour force is a key resource for local industry. Accordingly the availability and accessibility of: • Suitable educational institutions, training courses and apprenticeship programs are all important factors for business growth and attraction to a locality • Affordable and suitable accommodation within reasonable proximity of employment precincts is also a factor in the provision of a suitable local workforce	Businesses within centres take many forms and models and therefore have varying staff requirements. A flexible and diverse workforce is required to keep a centre operating and to provide a mix of service and retail options. The skill set and availability of staff is an important consideration for businesses when determining where to establish. Requirements considered include the: • Ability to live close to centres and not need to travel long distances to work

Principles	Employment precincts	Business centres
		• The availability of a range of age groups or staff seeking part time, full time or casual work • The vitality and character of a centre can have a large influence on a worker's choice to work for a business in that centre. The appeal of a centre as a place of work may be influenced by: – Its visual appearance – Offer of places to eat or meet during lunch hours or after work – The convenience of goods to enable time poor shoppers to pick up food and household related items on the way to / from work – The lifestyle options before, during and after work.
Economic agglomeration	• The success of employment lands is supported by the economic efficiencies gained by co-location. Referred to as business clustering or agglomeration, the benefits of businesses locating together are now widely understood. • Employment lands can facilitate the realignment of businesses making it possible for similar types of businesses to locate in proximity to each other. Evidence of this occurring has been the emergence of the Byron Industry and Arts precinct where specialist businesses are continuing to be attracted by co-location with other creative and entrepreneurial businesses.	• The success of business centre is supported by the economic efficiencies gained by co-location of businesses with similar or compatible uses (i.e. medical suites with hospitals, government offices and consultants etc) • Realignment of business will occur as technology needs change

8.0 KEY IMPLICATIONS

The preceding sections raised a number of implications for employment land in the Byron LGA that need to be considered during the development of the Employment Land Strategy. These have been summarised in Table 8-1.

Table 8-1: Study observations and implications

Theme	Challenges	Opportunities	Implications
Infrastructure	- Communication technology (specifically internet and mobile coverage) is poor - Limited serviced land on the market for immediate purchase and development	- Overall land availability in suitable locations - Encourage the subdivision and servicing of zoned industrial land to increase supply - Sustainable power and water initiatives	Land zoned for industrial uses is not immediately available. This effects the affordability and development capacity of uses wanting to locate into the LGA
Planning controls	- Compliance issues with short-term accommodation in some employment precincts - Permissibility of uses within Arts and Industry Estate	Undertake masterplan for the Arts and Industry Estate	Flexible planning controls to remove blockages and all broad range of activities
Expanding industries	- Competing retail uses within industrial estates effect land value and affordability, “pushing out” traditional industrial uses - Limited floor area available for events and conferences - Rental affordability	- Creative industries - Food production and manufacturing - Product manufacturing - Support tourism sector and services	- Investigate opportunity for more co-working spaces and co-labs to encourage innovation in centres and employment precincts. - Consider land appropriate for events and venue hire - Investigate new supply for industrial uses to support growth in traditional industrial uses - Investigate opportunities for possible food production and manufacturing cluster location
Strategic transport connections	Capacity of Ewingsdale Road and Pacific Motorway intersection	- Byron bypass - Upgrade of Ewingsdale Road and Pacific Motorway intersection	Investigate option of locating new employment precincts with good access to the Pacific Motorway
Traffic and transport	- Congestion on Ewingsdale Road and within and around Byron Bay town centre - Public and active transport connections need to be improved	- Additional bypass - Roundabouts along Ewingsdale Road - Investigate opportunity for additional public transport services to centres and employment precincts	- Consider the capacity and constraints in employment precincts and centre expansion imposed by road infrastructure constraints - Investigate improvements to road infrastructure
Workforce and skills	- Cost of living - affordability of housing to attract and retain employees in local area - Aging population - Attraction of skilled workforce	- Growing population - Promotion of attractive lifestyle for workforce - Training and upskilling courses	- Housing availability and affordability to be addressed in the Residential Housing Strategy - limits diversity in employment - Investigate incentives for larger companies offering longer term career

Theme	Challenges	Opportunities	Implications
			possibilities
Land availability	- Limited serviced land or floorspace available for immediate purchase or rent on the market - Flood constraints limiting redevelopment or appeal of investment - Conflict between residential and commercial and industrial uses	Introduce flood mitigation mechanisms to enable further expansion of Billinudgel industrial precinct	Confirm that future investigation areas do not conflict with future residential release areas
Release areas	Expansion of West Byron may create further traffic issues along Ewingsdale Road	- Tyagarah site identified for potential employment uses - Byron Food Hub	- Workshop sites for future employment precincts - Workshop centre expansion areas - Investigate longer term transport solutions

These findings have informed the development of the Byron Employment Lands Strategy.

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