ECONOMIC PROFILE OF THE TOURISM AND RECREATION INDUSTRIES IN THE REGIONAL FOREST AGREEMENT AREA

June 1998

Published by the joint Commonwealth and Western Australian Regional Forest Agreement (RFA) Steering Committee.

Copies of this report and further information are available from:

Executive Officer
Regional Forest Agreement
Locked Bag 104
BENTLEY DELIVERY CENTRE WA 6983
Infoline: (08) 9480 5872

Forests Taskforce
Department of the Prime Minister and Cabinet
3-5 National Circuit
BARTON ACT 2600
Ph: 1800 650 983

http//www.rfa.gov.au

FOREWORD

This report is one of a series of economic profiles for industries which access resources within the native forests of the south-west of WA. It was prepared as part of the economic assessment for the Western Australian Regional Forest Agreement.

The study was undertaken by the Western Australian Department of Resources Development (Mr Nigel Goodall and Mr Nathan Johnston) in association with the Western Australian Tourism Commission, the Department of Conservation and Land Management, and the Australian Bureau of Agricultural and Resource Economics.

By its very nature, tourism is a diverse industry. In a general sense, “tourists” include persons travelling for business, leisure, or other purposes. Tourism data has been compiled in this report to present forest-based tourism as a subset of tourism in the wider region and the State. However, while statistical data for tourism activity on a State-wide basis is readily available, the break-up of such data into forest-based tourism within a particular zone (e.g. the Regional Forest Agreement area) is much more difficult because specific data is not readily accessible. Forest-based tourism is mostly a component of leisure-based tourism, and represents only a portion of the wide range of social, cultural, sporting and recreational activities which occur in the RFA area.

This document therefore provides an overview of all tourism categories at the State-wide level and then proceeds to disaggregate this data to estimate specific forest-based tourism activity. The key measure in this report is the number of leisure-based tourists and daytrippers who visit the jarrah and karri forests in the RFA area. Analysis of the available visitor survey data suggests that in the Central and Southern Forest Regions around 18% of all tourists had visited the forests and around 58% drove to sightsee or for pleasure, while about 51% undertook some form of bushwalking/hiking/walking. The majority of these tourists and daytrippers had travelled from, or where enroute to, the Perth metropolitan area and coastal towns.

Accordingly, the Steering Committee recommends that readers consider the context in which forest-based tourism occurs as a subset of tourism in general, and that the figures presented herein are indicative estimates.

By its very nature, tourism is a diverse industry. In a general sense, “tourists” include persons travelling for business, leisure, or other purposes. Tourism data has been compiled in this report to present forest-based tourism as a subset of tourism in the wider region and the State. However, while statistical data for tourism activity on a State-wide basis is readily available, the break-up of such data into forest-based tourism within a particular zone (e.g. the Regional Forest Agreement area) is much more difficult because specific data is not readily accessible. Forest-based tourism is mostly a component of leisure-based tourism, and represents only a portion of the wide range of social, cultural, sporting and recreational activities which occur in the RFA area.

This document therefore provides an overview of all tourism categories at the State-wide level and then proceeds to disaggregate this data to estimate specific forest-based tourism activity. The key measure in this report is the number of leisure-based tourists and daytrippers who visit the jarrah and karri forests in the RFA area. Analysis of the available visitor survey data suggests that in the Central and Southern Forest Regions around 18% of all tourists had visited the forests and around 58% drove to sightsee or for pleasure, while about 51% undertook some form of bushwalking/hiking/walking. The majority of these tourists and daytrippers had travelled from, or where enroute to, the Perth metropolitan area and coastal towns.

Accordingly, the Steering Committee recommends that readers consider the context in which forest-based tourism occurs as a subset of tourism in general, and that the figures presented herein are indicative estimates.

TOURISM AND RECREATION WITHIN THE REGIONAL FOREST AGREEMENT AREA

Table of Contents

(Table of Contents continued)

E X E C U T I V E   S U M M A R Y

Introduction

This paper provides an economic profile of the tourism and recreation industries in the Regional Forest Agreement (RFA) area. It illustrates the integral part that the forests play in attracting visitors to the south west region of Western Australia. The paper summarises the number of visitors to the forests, tourist expenditure and its relationship to employment, and the expected growth of these elements over the 20 year RFA period.

Tourism in the Western Australian Economy

The tourism industry is a major contributor to Western Australia's economy and is predicted to become the fastest growing industry sector during the 1990's and into the next century.

The visitors in Western Australia are made up of tourists (overnight stay), people making day trips and recreationalists. This definition includes persons travelling not only for leisure but also for business purposes and those visiting friends or relatives. There is a significant overlap between tourism, recreation and day-tripping activity, and also in the facilities used by each group.

During 1995 and 1996, an annual total of 6.4 million tourists were recorded making trips in WA, and staying almost 34 million nights. Total tourist expenditure in WA was estimated at $1.9 billion, and the value of the travel and tourism industries accounted for 3.7% of Gross State Product (GSP). When the multiplier effect of tourism is accounted for this expenditure is estimated to be worth a total of $3 billion to the Western Australian economy.

Tourist expenditure also has a strong relationship with employment where an estimated 13 new jobs are created in the economy for every additional $1 million spent by tourists in Western Australia. In 1997, the tourism industry is estimated to have directly employed between 65,000 - 78,000 people, representing 8.0 - 9.6% of the State's total workforce, and over 93,000 people when indirect employment is taken into consideration.

Management and Promotion of Nature-based Recreation and Tourism

Forests are an important drawcard to leisure-based tourism and recreation, and form a significant part of the nature-based package that the State of Western Australia has to offer.

The Western Australian Government is taking a leading role in the management and promotion of nature-based tourism. The Western Australian Tourism Commission (WATC) is responsible for the promotion and development of nature-based and adventure tourism, particularly through its recent 'Brand Western Australia' campaign to interstate and overseas markets, which emphasises the State's unique natural environment and highlights the forests of the south west. The Department of Conservation and Land Management (CALM) is the State government agency responsible for the management of public forests in the south west and provides recreational and tourist facilities such as the Valley of the Giants tree-top walk. The Ministry of Sport and Recreation is assisting regional and local groups to develop recreational trails for a range of users through its 'TrailsWest' program. Other key contributors include the local Shires and Regional Development Commissions.

The private sector provides unique and exciting tourism products which generate substantial economic benefits for the region and the State. Private industry is a key partner in shaping the direction of forest-based tourism through influence on policy, provision of infrastructure, and promotion of tourism opportunities.

Tourism and Recreation in the Regional Forest Agreement Area

The Regional Forest Agreement (RFA) area encompasses the forests east of the Darling Scarp extending from Chittering north of Perth, through the south west region to Denmark on the south coast.

Tourism data for the Regional Forest Agreement Area was compiled by postcode area into two regions; the Swan Region, and the Central and Southern Regions. These directly relate to regional administrative boundaries used by the Department of Conservation and Land Management. An assessment has been made of visitors to these regions during 1995 and 1996 and then the visitor data has been further sub-divided to determine tourists and day-trippers visiting the forest areas.

In the RFA area during 1995 and 1996, an average of 2.38 million visitor trips were made each year. International visitors were estimated to have made 5% of these trips, interstate visitors 8% and intrastate visitors 87%. The majority of these tourists (88.3%) were visitors to the Central and Southern regions.

Central and Southern Regions

During 1995 and 1996, nearly 2 million trips a year were made to this region and visitors stayed an average of 3 nights per person, totalling 6.5 million nights per year. This amounts to approximately 33% of all visitor trips made in WA.

The average annual expenditure by tourists in the Central and Southern regions in the two year period 1995 and 1996 was $250 million. Of this, some $44.2 million is associated with tourists who visited the jarrah and karri forests.

Tourism in the combined Central and Southern Regions is estimated to contribute to the employment of between 4,900 to 6,000 people, excluding self-employed people, and between 7,000 to 9,500 people when indirect employment is accounted for. The number of self-employed operators in this area who derive some part of their income from tourism related activities is likely to range between 1,400 to 1,800 persons (SWDC personal communication 1997).

An assessment of visitor activities indicates that the forests were a significant attraction for visitors to the region. The assessment also shows that the forests have a broad scenic appeal and form an integral part of the whole tourism package for visitors to these regions.

Swan Region

During 1995 and 1996, 397,000 trips a year were made to this region and tourists stayed an average of 5 nights per person, totalling 2 million nights per year. This amounts to approximately 7% of all visitors in WA making a trip to the region.

Average annual expenditure by tourists in the Swan region during 1995 and 1996 is estimated to be $66 million. Of this, some $3.5 million is associated with tourists visiting the jarrah forests.

Day-trippers to the Swan, Central and Southern Regions

Over 3.9 million individual day trips as well as 1.3 million group day trips a year were made to the RFA area during 1995 and 1996.

These day-trippers are estimated to have expended over $70 million each year, of which $7.4 million is associated with visitors to jarrah and karri forests.

Statistics on day trip activities indicate an annual total of 411,500 day-trippers (10.5%) visited the jarrah and karri forests in the RFA area. Visits made to the forests were almost equally divided between the Swan Region (203,000) and the Central and Southern Regions (208,500).

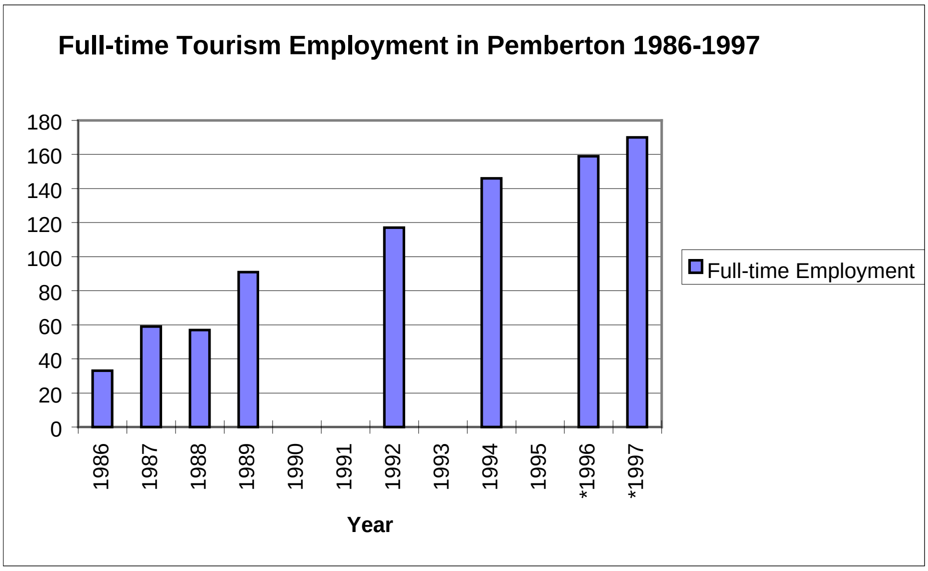
Tourism Case Study on Pemberton

Data was collected from 60 tourism-related businesses in and around the town of Pemberton to examine the changes in employment over time by comparison to an earlier study.

Major findings were that:

- Employment in the tourism industry in Pemberton in 1997 is estimated to be 87 owner/operators, 83 full-time employees and 148 part-time and casual employees, totalling 318 people. This equates to an estimated 233 full-time equivalent (FTE) jobs. This is an increase on 1996 of 43 people (or 25 FTE).

- Full-time tourism employment (including owner/operators) has increased at 12.9% per annum, tripling in a decade from 57 people in 1988 to 170 in 1997.



Expected Growth in Forest-based Tourism

The WATC's 'Brand Western Australia' marketing campaign together with the Australian Tourism Commission's marketing of Australia's 'Great Outdoors' are particularly well suited to attracting visitors from overseas and interstate markets to the nature-based tourism potential which is offered by Western Australia's forest areas. It is also clear from the recent development of the Valley of the Giants tree top walk project that major forest-based attractions can have a positive stimulus in attracting additional visitors - a case of the supply of an attraction developing on a 'latent' demand. The combination of marketing and the development of forest facilities is expected to capitalise on the growing nature-based tourism market which is believed to be expanding at 20-30% per annum.

Overall Growth Estimates

It is necessary to scope the potential demand during the RFA period in order to estimate its impact on the study area. Based on tourism market segment growth predictions:

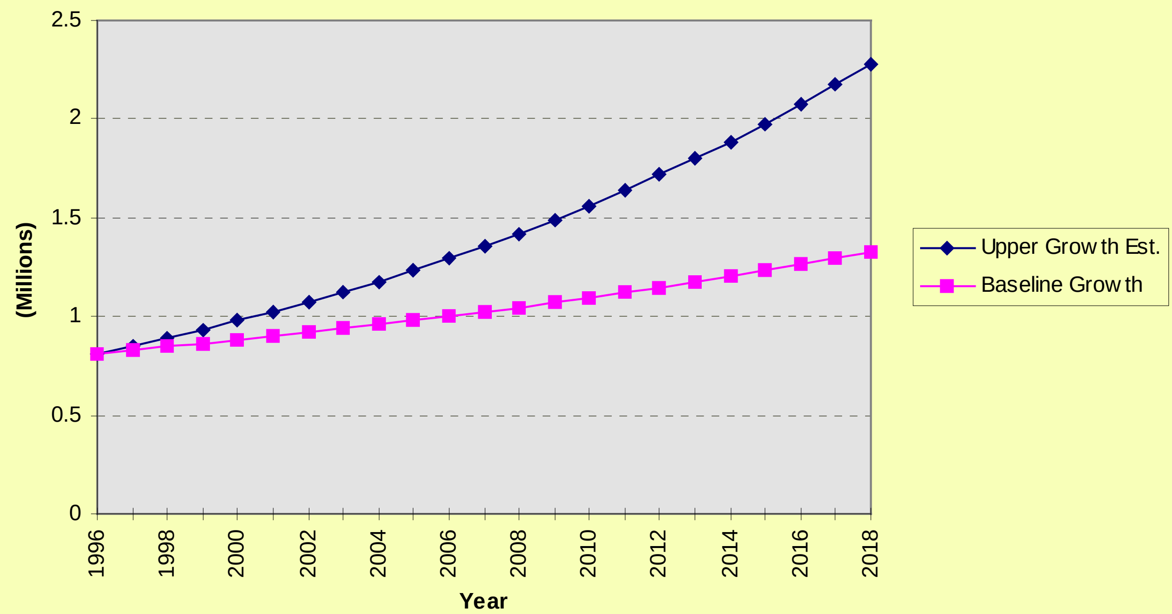
- Overall visitor trips to forests in the RFA area are predicted to increase from 812,500 in 1996 to between 1.28 and 1.33 million in 2018.

When compared to visitor numbers recorded by local tourist bureaux, where growth has averaged 11.5% per annum over the past 6 years, these estimates may be considered conservative and represent a baseline growth figure.

Should growth continue at higher than expected rates throughout the RFA process, then estimates of the total number of visits by tourists and day-trippers to karri and jarrah forests in the RFA regions could be expected to be up to 2.3 million by the year 2018. Western Australians travelling within their own State and daytrippers will account for the majority of this growth over the next 20 years in the south west region. Any short-term reductions to international tourism that may occur from reduced economic growth in Asian economies are not expected to impact significantly on these growth estimates.

These growth estimates, together with an estimate based on CALM's visitor statistics that tourists on average visit 2 forest sites per trip, offers a range within which it may be reasonable to plan for tourism demand.

Figure 5.1: Estimated Growth in Number of Visits Made to the RFA Forests



Expected Growth in Tourist Expenditure and Employment in the RFA Area

Using estimates made by the Tourism Forecasting Council of future visitor numbers and nights it is possible to estimate the corresponding increase in tourist expenditure (assuming current expenditure patterns). From this data the possible employment generated from the increased expenditure was calculated. Although broad estimates, these statistics provide an indication of the potential economic changes over the 20 year RFA period from tourism.

The total annual expenditure directly related to tourists who visited karri or jarrah forests in the RFA area during 1995 and 1996 is estimated to be $55.1 million. By 2018, this is predicted to almost double to $107.2 million, with the majority (88%) coming from visitors to the Central and Southern forest regions. This increase in expenditure is estimated to create an additional 676 jobs in the region.

Development Planning

A wide range of factors need to be considered when planning strategies for tourism development in forest areas. CALM, as the manager of public forests, must continue to play a lead role in ensuring tourism development is compatible with other uses of the forest and is sustainable.

Developers (both private and government) need to provide appropriate facilities and infrastructure for the wide range of tourism and recreational interests. These developments need to take into consideration the expected tourism growth in general and in the specific market niches.

Tourism developments aimed at meeting the expected tourism growth should be ecologically sustainable to ensure that the resource on which it is based is not degraded. One approach to tourism development in natural areas is to contain facilities and activities to specified areas rather than allowing dispersion of development and/or activities throughout a region

Development planning also needs to involve consultation with key stakeholders, particularly in relation to key areas of growth and the facilities required to support this growth.

Forest-based tourism clearly needs to be compatible with other uses. This would be facilitated by ensuring that future forest management plans involve greater consideration of tourism issues. To this end a forest-based recreation and tourism advisory group is being formed to assist CALM in the development of tourism and recreation initiatives.

Potential Conflicts Between Tourism and other Forest Uses

There are a number of areas where tourism and tourism development can conflict with local groups and with other forest users. For example, some operators in the industry hold the view that protection of old growth forest is required for tourism and that the short-term impact of timber harvesting and burning on aesthetics affects tourism. Others in the community feel that tourist growth could affect existing lifestyle and qualities of the community.

It is inevitable that conflicts will continue where disparate interests are concerned. These could be ameliorated through added emphasis on open and consultative planning for tourism in forest areas.

1.0 INTRODUCTION

1.1 Overview of the Paper

This chapter defines tourism and recreation, summarises the major businesses that are part of and benefit from these industries, assesses the economic impacts of tourism on a State and regional basis, makes some estimates of growth in forest usage over the 20 year period that the Regional Forest Agreement (RFA) will be in place, and summarises some of the potential conflicts that may arise between the tourism and recreation industries, local communities and other forest users.

1.2 Definition of Tourism, Recreation and Day Trippers

Tourism has been defined as:

"...the activities of persons travelling to, and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes." (Industry Commission, 1996).

Tourists include two groups:

1. Domestic tourists - those travelling within their own country; both interstate and intrastate; and
2. International visitors - those travelling outside their home country.

In addition to those travellers who stay overnight, the United Nations Economic and Social Council (UNESC) - World Tourism Organisation's (WTO) definition of tourism includes day-trippers. These are people travelling more than 50 kilometres from their immediate environment for tourism or recreational activities but returning within the same day. The two groups may use many of the same facilities and visit the same attractions.

There is also an important link between tourism and recreation in terms of activities or experiences. Recreation is defined as the range of social, cultural, sporting and other activities undertaken in leisure time, while 'leisure' is defined as time uncommitted to work, family or personal nature. While not all recreational activities are classed as tourism, there is a significant overlap between tourism, recreation and day-tripping.

1.3 The Study Area

The forests of the south west form an important part of the nature-based tourism package that Western Australia has to offer. Together with the superb beaches, excellent scenery, wildlife, vineyards and other attractions, the forest areas are a key part of the overall attraction of the south west region for tourists.

The area encompassed by the RFA process (Map 1) can be classified into three administrative regions, currently used by the Department of Conservation and Land Management (CALM).

The 3 regions are:

- Swan region
- Central region
- Southern region

1.3.1 *Swan Forest Region*

The Swan Region extends approximately from the Moore River in the north, to the eastern boundary of the Northam Shire, south to Wandering. The southern boundary of the region extends from Yalgorup to Waroona and along the Murray River. The Western boundary is the Indian Ocean.

The size of the Swan Region is about 1.97 million ha, of which some 0.65 million ha (33%) is land vested in CALM and a further 0.05 million ha (2%) is unvested land managed by CALM.

CALM divides the region into three districts namely Perth, Mundaring and Dwellingup, of which only Mundaring and Dwellingup are in the RFA area.

The Swan Forest Region included in the RFA is almost contingent with the Darling Range running east of Perth. The range comprises the Darling scarp and the Darling Plateau east of the scarp. It is an area of outstanding beauty with forests, valleys, seasonal rivers and streams and spectacular views over the coastal plains to the ocean.

The conservation values of the Darling range are recognised by the large number of national parks, nature reserves and conservation reserves in the area. Most of the wooded areas are State forest. The majority of forest lands set aside in the Darling Range, as well as State Forest or National Parks, are also protected water catchment areas under the control of the Water Corporation. Consequently, this has a major influence on the use of the Perth hills including many areas that form an integral part of the tourism product. Parts of the Darling Range were favoured winter hunting and gathering grounds for the local Noongar tribes and the Bibbulmun Track bushwalking route, which runs south from Kalamunda, was named after a Noongar group.

From the recreational and tourist aspects, the Swan Region can be effectively considered in three sections; the Avon, Hills, and Peel forest areas.

The Avon sector

This sector includes the Avon National Park and the (proposed) Walyunga National Park plus a wide range of scenic drives, areas of interest, picnic spots, walks, wildflowers and wildlife. The Avon River, the location of Western Australia’s premier white water race, passes through both parks joining the Swan River at Walyunga. This event draws a large number of visitors to the State each year.

The Hills Forest sector

The Hills Forest lies half an hours drive east of Perth. It is served by the twin gateways of Mundaring and Kalamunda and stretches almost as far south as Karragullen near the Brookton Highway. It covers 80,000 ha and crosses four shire boundaries: Kalamunda, Mundaring, Swan and Gosnells.

It includes the John Forrest National Park, Mundaring Weir, areas of State forest, Lake Leschenaultia, dam and reservoir sites and many other places of recreational and conservation significance. There is a range of walk and heritage trails, including the start of the Bibbulmun Track. CALM formed The Hills Forest concept in 1991 to offer visitors an enjoyable experience which also involves an awareness and appreciation of our forest values.

The area also produces a range of natural products (wine, fruit and vegetables) and has extensive arts and crafts studios.

Peel Forest Sector

The Peel Forest area approximates the CALM district of Dwellingup. This area has four major reservoirs on the Canning, Serpentine, North Dandalup and South Dandalup Rivers and includes the towns of Dwellingup, Boddington and Jarrahdale. Major recreation areas include the Serpentine National Park and Lane Poole Reserve, both of which are popular with metropolitan and overseas visitors.

Other attractions in the forest area include:

- The Forest Heritage Centre at Dwellingup which provides visitors with an understanding of the social, community, aesthetic and economic benefits that come from Western Australian forests;
- Boddington Rodeo – an annual event which takes place on the first Saturday of November and attracts riders from all over Australia;
- Hotham Valley Tourist Railway;
- Bibbulmun Track and other walk trails being developed by CALM and the Serpentine-Jarrahdale shire councils.

1.3.2 *Central Forest Region*

The Central region is bounded approximately by the northern boundary of the Shire of Harvey at the town of Yarloop and extends across to the eastern boundary, west of the town of Williams, and extending south through Darkan and Kulikup in the east. The southern boundary is the Southern Ocean from Augusta to Blackpoint, north along the Vasse Highway and along the Blackwood River through Bridgetown. The western boundary is the Indian Ocean.

The Central region has an area of 1.80 million ha of which some 0.78 million ha (44%) is land managed by CALM and 0.04 million ha (2%) of unvested land managed by CALM.

CALM divides the region into the Mornington, Blackwood and South West Capes districts.

Mornington

Major forest-based attractions in this District are associated with the waterways, especially Wellington Dam. This provides a nature-based attraction offering good day-tripping facilities as well as international standard rowing and kayaking courses which attract major sporting events. Other dams in the region include Harris River, Logue Brook, Stirling, Wellington Weir and Harvey Weir.

This area also offers forest scenic drives, bushwalking and camping.

Other major attractions in the Mornington District include the Collie Arboretum, the Wellington Discovery Forest Eco Museum, the Bibbulmun Track, Lane Poole Reserve, Leschenault Peninsula Conservation Park and Yalgarlup National Park.

Blackwood

The Blackwood River sector has a dispersed nature-based tourism product with key themes developed around the river and other waterways, the jarrah forest and associated scenic drives. Major nodes for tourism in this area are the towns of Bridgetown, Nannup and Balingup, as well as the Blackwood River itself. Nannup is also a centre for the timber milling industry.

Major attractions in this area are the Balingup to Nannup drive, Nannup Heritage Trail, and Barrabup Pool and Willow springs picnic areas, both on the site of old timber towns. Other attractions include the Nannup Arboretum, Arts and Crafts Centre and Gemstone Museum, and the timber mill. Special events include a folk music festival, the Broadaxe 1000 team relay race, and the Blackwood Classic.

Around Bridgetown there are eight scenic drives including the Geegelup Heritage Trail and several scenic walk trails. Attractions include the Bridgetown Jarrah Park, historic houses, pottery and timber products, art galleries and exhibitions, fishing and canoeing, including guided tours and swimming.

Special events around Bridgetown include Chamber Music and Blues Music Festivals, the Blackwood Classic (powerboat event) and the Blackwood Marathon Relay.

The town of Balingup hosts the Small Farm Field Day in April and also the Mediaeval/Tulip Carnival in August. The realigned Bibbulmun Track runs through Balingup and the road to Nannup along the Blackwood river is a key tourist attraction. The Old Cheese Factory arts and crafts centre and the Ellendale Gallery are other tourist attractions.

South West Capes

Most tourism attractions in this area are associated with the towns of Busselton, Dunsborough, Yallingup, Margaret River and Augusta. These towns, particularly Margaret River, offer a base from which visitors travel to visit the nature-based attractions, including the forest area. Boranup Karri Forest in the Leeuwin Naturaliste National Park provides an example of a regrowth forest after logging in the late 19th century.

Camping and picnic areas in State forest are generally associated with the Blackwood River and Conservation Parks. They include Canebreak Pool in the Rapids Conservation Park, Ten Mile Brook, Canebreak picnic area along Brockman Highway. Local walk trails in the area include the Augusta-Busselton heritage trail, and short walk trails adjacent to the picnic areas.

1.3.3 ***Southern Forest Region***

The Southern Forest Region is bounded approximately by the Blackwood River in the north west, Bridgetown to Frankland to Mount Barker in north-east, Albany Highway and South Coast Highway in the south-east, the Southern Ocean in the south-west and the Vasse Highway in the west.

This forest region has an area of 1.44 million ha of which some 0.74 million ha (51%) is managed by CALM and a further 0.19 million ha (13%) is unvested land managed by CALM. The region is divided by CALM into the three districts of Manjimup, Pemberton and Walpole.

Manjimup

This district stretches from the Donnelly River in the west, through Manjimup to Perup and Lake Muir Nature Reserves to the east. The area includes a range of current or proposed conservation parks and nature reserves with the major tourism attractions centred around Manjimup and Donnelly.

Attractions include walk trails, bush walks, scenic forest areas, water attractions, heritage and pioneer sites. Sporting events and festivals include the Manjimup Timber Festival and the 15000 Motorcross International event. Numerous picnic areas have associated walk trails, e.g. Fonty's Pool, One Tree Bridge, The Four Aces, Wheatley Dam (timber and other trails), King Jarrah, and Diamond Tree. There is also fishing, mainly for rainbow trout and cobbler.

Pemberton

The Pemberton District includes the Warren, Beedelup, D'Entrecastreaux and Shannon National Parks and the tourism centres of Pemberton and Northcliffe.

The area is developing as one of the south-west's major nature-based tourism destinations incorporating walk trails, bush walks, water attractions, recreational and adventure-based tourism, major forest-based scenic attractions and scenic drives. Other tourism attractions include vineyards, marron and trout farms and a wide range of accommodation facilities.

Attractions in this District include:

- Forest attractions and associated walks such as the Gloucester tree, 100 year forest, and Tramway trail.
- Pemberton-Northcliffe tramway.
- Big Brook Dam - water, fishing, swimming, forest and picnic attraction.
- Trout and marron hatchery and farms.
- Forest Industries Centre and Pemberton Sawmill.
- Horseback riding/trails.
- Woodcraft, ceramics, jewelery from local craftsmen.
- Warren, Shannon, Dave Evans and Beedelup National Parks
- Picnic areas and walking trails are located at East Brook, Gloucester Tree, Brockman Saw Pit, the Cascade, Warren Bridge, National Parks, Big Brook, Moons Crossing.
- Festivals include the King Karri Carnival.

Northcliffe features forest attractions such as Boorara Conservation Park (including Lane Poole Falls) and Shannon National Park and associated picnic areas and walk trails. Other attractions include the Northcliffe Forest Park, Pioneer Museum and other recreational trails.

D'Entrecastreaux National Park

The majority of the D'Entrecastreaux National Park is only accessible by vehicles on 4-wheel drive tracks with limited access to river mouths such as the Donnelly, Warren, Meerup and Doggerup. The only road into the area is from Northcliffe to Windy Harbour which gives access to scenic coastal views, camping, beach and safe swimming facilities. Bushwalking and nature viewing has become a popular activity in this National Park.

Walpole

The Walpole District is bounded by the South Western Highway and incorporates the existing and proposed reserves of Mt. Frankland, Walpole-Nornalup and Mt Lindesay National Parks, the Mt Roe reserve and significant areas of State Forest and nature reserves.

The area includes forest drives accessible to on-road vehicles and the tourism centres of Walpole and Denmark. Other activities and events include the south-west angling championships, Walpole Yacht Club Regatta and the Walpole Art Group, Denmark arts and crafts market days and the Rainbow Festival. The Valley of the Giants and the Tree Top Walk have become key attractions, drawing large numbers of tourists to the area, and are being promoted around the world by the Western Australian Tourism Commission.

1.4 Management and Promotion of Nature-based Recreation and Tourism in the RFA Area

Tourism and recreation have always been an important use of forest areas. Much of the initial infrastructure including towns, roads and car parks, has been based around facilities to which the timber industry has been a major contributor. Further infrastructure has been, and is continuing to be developed through private investment by the tourism industry. In addition, forest users including the timber industry and mining companies are contributing to the ongoing development of recreation sites and programs to reintroduce native species into the forests.

The Department of Conservation and Land Management (CALM) is the State government agency responsible for the management of the State forest and conservation reserves in the RFA area. CALM has actively developed a wide range of nature-based recreation and tourism areas and facilities in forest areas ranging from day use and camping areas to major visitor attractions such as the Tree Top Walk at the Valley of the Giants east of Walpole.

Other key contributors include the local Shires and Regional Development Commissions. The Ministry of Sport and Recreation is also assisting regional and local groups with funding to develop trails for a range of users from bushwalkers, families and occasional walkers to trails for mountain bikes and equestrian use.

Promotion of forest-based tourism is also undertaken by individual operators, the WA Tourism Commission, tourist bureaux, development commissions, regional tourism associations, CALM and local shires. This local marketing thrust is supported by the Australian Tourist Commission's promotion of Australia's 'Great Outdoors' and the WATC's interstate and overseas 'Brand Western Australia' marketing campaign.

1.4.1 Western Australian Government

Many Government agencies impact on the pace of tourism growth. These include the Western Australian Tourism Commission, the Department of Conservation and Land Management and the Regional Development Commissions. Other Departments supply resources and knowledge as appropriate. For 1997/98, tourism funding from the WA government, via the WATC, totals $28 million.

In 1997 the Western Australian Government released its Nature-based Tourism Strategy which applies directly to forest-based tourism. This strategy is based around five guiding principles:

1. Conservation of the natural environment;
2. Involving and benefiting local communities;
3. Improving knowledge;
4. Providing quality products and services; and
5. Efficient and effective industry. (WATC & CALM, 1997)

These principles are being applied by the Government agencies in their strategies to develop nature-based tourism.

1.4.2 Western Australian Tourism Commission (WATC)

The WATC's mission is to encourage sustainable development of the tourism industry for the longer term social and economic benefits of the State. As such it has a lead role in the development of the nature-based tourism industry.

Marketing of WA's nature-based tourism package (which includes forest-based tourism) is a co-operative venture between tourist operators, industry associations, State and Federal Government, local government and local communities. The recent 'Brand Western Australia' campaign aimed at overseas markets emphasises the State's clean green pristine image.

The Tourism Commission also works with developers and local communities to ensure that facilities complement the local environment and that a sustainable ethic is fostered for tourism development around the State.

Other functions of the Tourism Commission include:

- Advises prospective investors/developers on the market and financial viability of projects
- Advises developers on project design matters
- Makes representations to the Main Roads Department and local authorities on road signage matters.
- Provides input into State, Federal and Local Government on matters relating to developments
- Encourages local authorities to adopt positive tourism development policies and assist Councils in their efforts to attract development

1.4.3 Department of Conservation and Land Management (CALM)

CALM plays a central role in fostering and assisting the growth of nature-based tourism. CALM is committed to developing a sustainable nature-based tourism industry in the State and considers industry as an essential partner in achieving this objective.

CALM facilitates nature and forest-based tourism by identifying areas of special interest, developing co-operative relationships with tour operators, facilitating tourism access in ways that protect natural assets, and in the siting and landscaping of tourism infrastructure. By providing access to the forest estate and providing the opportunity to learn about WA's unique environment, CALM can assist the development of world-class tourism products.

The key ways CALM assist to develop and manage a forest-based tourism industry include:

- provide controlled access to forest environments in accordance with forest management plans and other statutory requirements;
- assist development of a code of ethics and industry recognised accreditation scheme for tourism operators;

- develop and maintain high quality facilities and services;
- develop quality information, education and interpretive material and programs on the forest plants and wildlife;
- improve on the already high standard of visitor service to ensure a high level of visitor satisfaction;
- assist to establish and deliver training and education programs for tour operators;
- participate in developing regional and local tourism strategies;
- assist the WATC to promote and market forest-based tourism products;
- identify opportunities for nature-based enterprises on CALM managed forest land;
- identify ways of improving the tenure of nature-based enterprises on CALM managed forest land; and
- monitor the effects of tourism on natural ecosystems and features.

1.4.4 Regional Development Commissions

Regional Development Commissions in the area (Peel and South West) have a key role in promoting and facilitating economic and social development.

Their role in forest-based tourism includes; identifying zones of opportunity, the development of local and regional tourism strategies, providing and attracting funding for tourism projects and facilitating infrastructure development, tourism studies and tourism monitoring.

1.4.5 Local Government Authorities

Local Government Authorities are a provider of services and facilities to support tourism in the region. Local Government has a major influence on tourism development through land zoning, licensing, rating procedures, health and building regulations and the provision of local infrastructure.

Local community involvement in planning for tourism development can be significantly influenced by initiatives of local government such as the preparation of tourism strategies for the shire.

1.4.6 The Private Sector

The private sector has an important role as a provider of diverse and exciting tourism products which generate economic benefits for the region and the State.

This sector includes tour and accommodation operators, holders of leasehold and freehold land which feature natural attractions, and operators of flora and fauna sanctuaries.

The industry is a key partner in shaping the direction of forest-based tourism through influence on policy, provision of infrastructure, and promotion of the tourism opportunities.

2.0 TOURIST OPERATORS USING THE FOREST AREAS

A wide range of tourism operators are licenced by CALM to operate within the State Forests and National Parks in the Swan, Central and Southern Forest Regions. In April 1997 there were 126 licensed operators.

Of these, 70 were based in Perth, 6 in the Swan region, 26 in the Central and Southern regions, 9 north of the RFA area and 15 interstate. The activities offered by these operators are set out below.

Activity	**Number of Licensed Operators**	**Activity**	**Number of Licensed Operators**
Aboriginal Culture	10	Four Wheel Drives	34
Abseiling	20	Horse Trails	4
Birdwatching	17	Mini-bus Tours	5
Bushwalking	53	Orienteering	3
Camping	54	Photography	7
Canoeing	21	Rafting	13
Caving	21	Rock Climbing	14
Coach Tours	16	Safari Tours	10
Cycling/ Mountain Bike Riding	6	School Programmes	19
Day Tours	28	Scientific	5
Fishing	5	Sightseeing	45
Forest Heritage	7	Wildflower Viewing	30

Other operators located around these forested areas provide a wide range of services to tourists such as tourist bureaux, hotels, motels, resorts, guesthouses, bed and breakfast, lodges, backpackers, self-contained accommodation, caravan parks, camping areas, restaurants and cafes. There are also organisations offering tourist attractions such as vineyards, train and tramways, art and fine wood galleries, fish farms and wildlife parks.

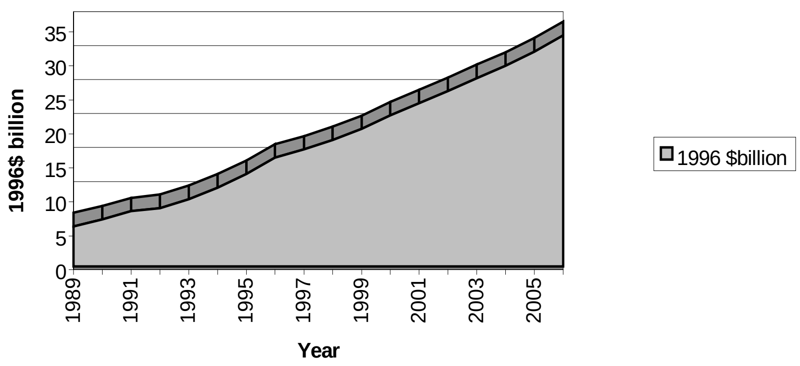
3.0 ECONOMIC IMPACTS OF TOURISM

3.1 Economic Benefits of Tourism

Tourism has become one of the biggest industries in the world. According to estimates prepared by the World Travel & Tourism Council (WTTC), tourism directly and indirectly accounts for about 11.5% of jobs, more than 14% of investment, 13% of exports, 12% of wages, and about 10.5% of GDP in Australia, making it of major economic significance (Office of National Tourism 1997). The total contribution from both inbound and domestic tourism is worth $60 billion to the Australian economy.

Inbound tourism has become one of Australia's leading export earners. In 1996, it contributed $16 billion to the nation's economy, up from $9 billion in 1989 (Office of National Tourism 1997). Growth is predicted to average 7.8% per year over the next decade to increase to $34 billion (1996 dollars) by the year 2006 (TFC, 1997) (Figure 3.1):

Figure 3.1 Value of International Tourism 1989 - 2006



Source: TFC, June 1997 (Years 1997-2006 are Forecasts)

In Western Australia, the tourism industry is a major contributor to the State's economy and is predicted to become the State's fastest growing industry sector during the 1990's and into the next century (WATC, 1997a).

The most effective means of measuring the economic impact of tourism is derived from data on tourist expenditure. Tourists make a significant contribution largely through expenditures within the region. However this information must also include the amount spent by tourists in their country of origin as many buy packages (airfares, accommodation, tours).

In 1995-96, total tourist expenditure for the whole of WA was estimated at $1.9 billion, and the value of the travel and tourism industries accounted for 3.7% of Gross State Product (GSP) (WATC, 1997a). When the multiplier effect of tourism is accounted for this expenditure is estimated to create an additional $1.14 billion in the Western Australian economy.

3.2 Employment

Tourists purchase a range of goods and services which affect many sectors of the economy and this expenditure is directly related to employment. The WATC has estimated that for every additional $1 million spent in Western Australia by tourists, 13 new jobs are created in the economy when compared to the previous year. In 1997, the tourism industry in Western Australia is estimated to have contributed to the direct employment of between 65,000 to 78,000 people, representing 8.0 to 9.6% of the State's total workforce (WATC personal communication, 1997) (Figure 3.2; Figure 3.3).

Figure 3.2

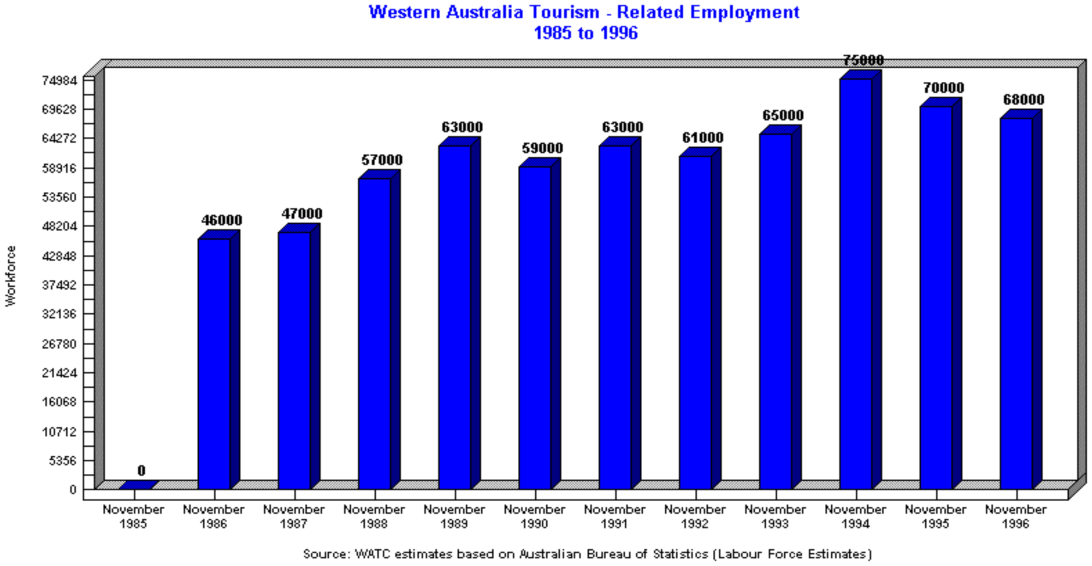
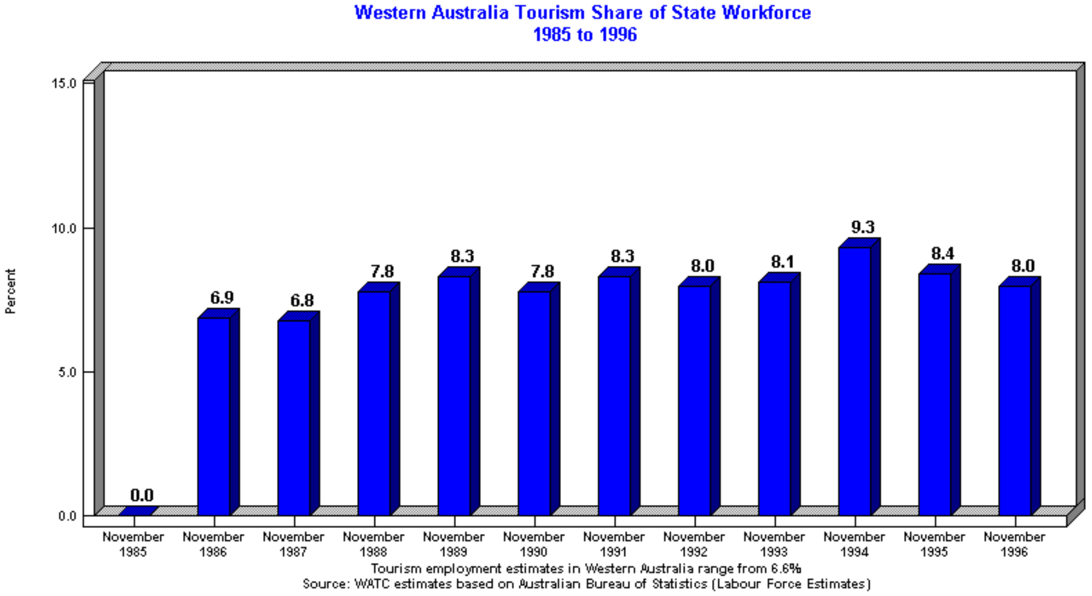
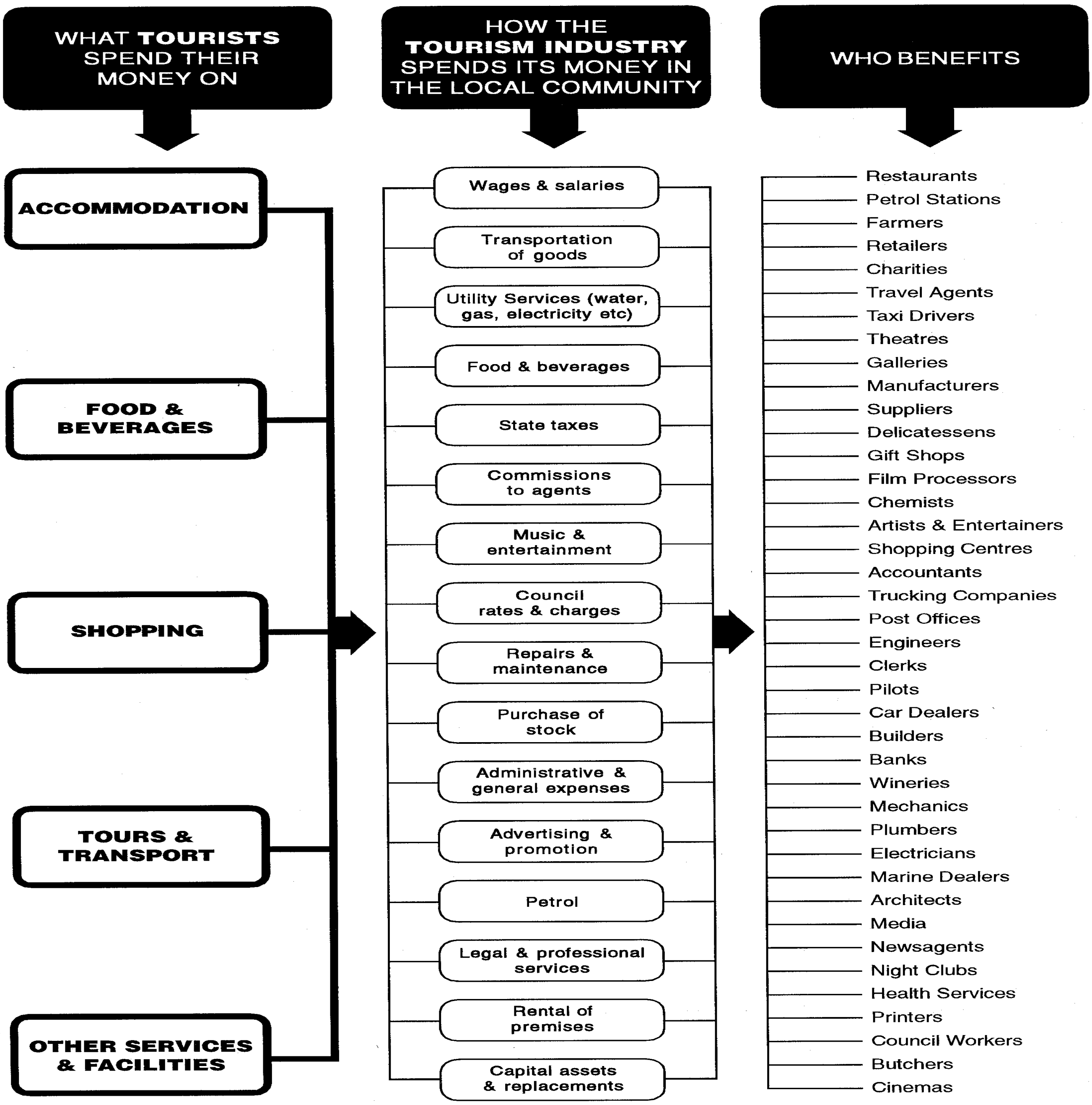


Figure 3.3



The flow-on effects of tourism expenditure into many industries is shown below:

Figure 3.4: Flow-on Effects of Tourism Expenditure



The tourism industry offers scope for both direct employment creation, as it is a labour intensive industry, and indirect employment in associated industries. Tourism employs many young and unskilled people, and offers opportunities for people from ethnic and aboriginal backgrounds to utilise their language and cultural skills. A significant proportion (33%) of tourism jobs in Australia are part-time, 74% of which are filled by women. Tourism employment is spread across a wide range of different industries and skill levels and these labour characteristics of the industry indicate that it has the potential to make a significant contribution to a reduction in long-term unemployment (Hutchinson, 1997).

Many rural and regional communities are turning to tourism to diversify their local economies and employment base as tourism is complementary to the existing primary production and forestry industries. Precise data on direct regional employment levels are difficult to obtain due to the diverse nature of the tourism sector. However, a broad estimate was derived by applying the State level proportion of total tourism employment to figures for the total labour force in the Region. Tourism in the combined Central and Southern Regions is estimated to contribute to the employment of between 4,900 to 6,000 people, excluding self-employed people, and between 7,000 to 9,500 people when indirect employment is accounted for. The number of self-employed operators in this area who derive some part of their income from tourism related activities is likely to range between 1,400 to 1,800 persons (SWDC personal communication, 1997).

3.3 Investment in Tourism and Recreation

Another measure of tourism's contribution to the economy is through investment. CALM provides and manages a range of facilities and assets which are located within the forests in the RFA area. The value of CALM recreation and tourism assets (including roads) in the Swan, Central and Southern regions is estimated to be $7.2 million, $7.0 million and $7.9 million, respectively. In addition, the value of the Bibbulmun Track infrastructure across all three regions is estimated at $2.5 million (CALM, personal communication, 1997).

The current level of private sector investment in tourism projects that have been completed or are under construction in and around the Central and Southern regions in the year 1997 is approximately $102.7 million (WATC, 1997b). Although this investment is not all related to forest-based tourism, the forests are a significant part of the tourism package that attracts visitors to the Central and Southern regions.

Table 3.3: Private Sector Tourism Investment in the Central and Southern Forest Regions

Year	1991	1992	1993	1994	1995	1996	1997+
Cost ($M)	11.2	2.8	13.7	6.3	22.1	7.9	**102.7***

Source: **WATC, 1997d**

***** includes projects under construction with the majority to be completed by end of 1998

There are also an additional 64 projects at the planning stage in the Central and Southern forest regions worth $213.6 million, due for completion before the year 2000. This makes the total investment over the decade from 1991 to the year 2000 estimated to be $380.3 million (WATC, 1997d). Average investment over the years 1997-2000 is estimated at $79 million per annum.

Private sector tourism investment in the Swan region was difficult to quantify. However, the majority of usage of the forests in the Swan region comes from day-trippers from areas generally outside of the RFA boundaries (Perth metropolitan and Peel). Private sector tourism investment in Perth metropolitan and Peel areas in 1997 amounted to $148.7 million of projects completed or currently under construction. In addition there are 31 projects at the planning stage worth $538.2 million (WATC, 1997b).

4.0 STATISTICAL DATA

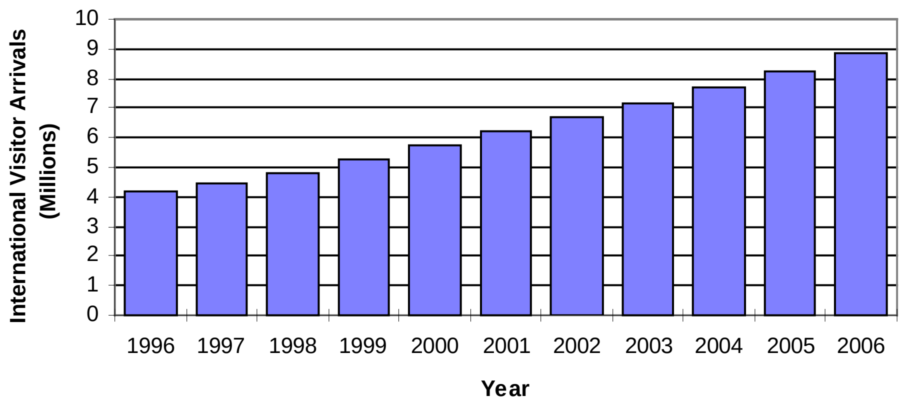
4.1 Visitor Levels

Nearly 592 million international tourists travelled the world in 1996 according to estimates by the World Travel and Tourism Council. This is an increase of 4.5% on the 1995 estimate and by the year 2000 international tourists are predicted to have increased to 702 million world-wide (TFC, 1997).

4.2 Australia

According to the TFC the number of international visitors to Australia is expected to double from 4.2 million in 1996 to 8.8 million in 2006, representing an average annual growth rate of 7.8% (Figure 4.2).

Figure 4.2: International Visitor Arrivals (Millions) 1996 - 2006

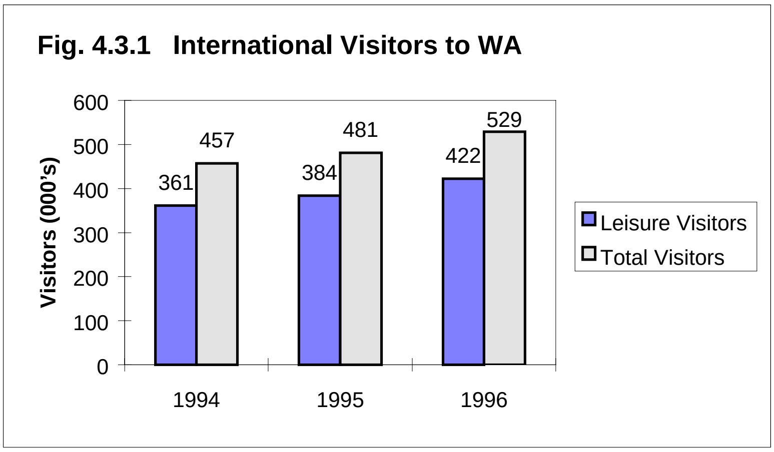


Source: TFC, June 1997

4.3 Western Australia - Current Statistics

International Visitors

During 1996 approximately 529,000 international visitors travelled to Western Australia. While this was an increase of 8.9% over 1995, the State's market share of Australia's international visitors declined marginally from 13.0% in 1995 to 12.7% in 1996. Visitor nights in WA rose to 10,097,000, an increase of 23.7% over 1995. This represented an average visitor stay of 21 nights. Of these international visitors, 39% were associated with holidays, 26% were visiting friends and relatives, 4% were business and 31% were for other reasons. 80% of all international visitors to WA came primarily for leisure.



Source: WATC, 1997a

International Tourism Outlook for WA:

If international visitors to Australia meet the predicted average annual growth rate of 7.8% (Table 4.2, Appendix 1), then the number of international visitors to WA would almost double from 529,000 in 1996 to 1,040,000 in the year 2005. If growth were to continue at this rate, then Western Australia could expect approximately 2.76 million international tourists by the year 2018. The effect of the Asian monetary crisis is likely to reduce Asian visitation rates in the short term. However, there is also expected to be corresponding short-term increases in the European and North American visitor arrivals due to the devalued Australian dollar and cheaper airfares to Australia.

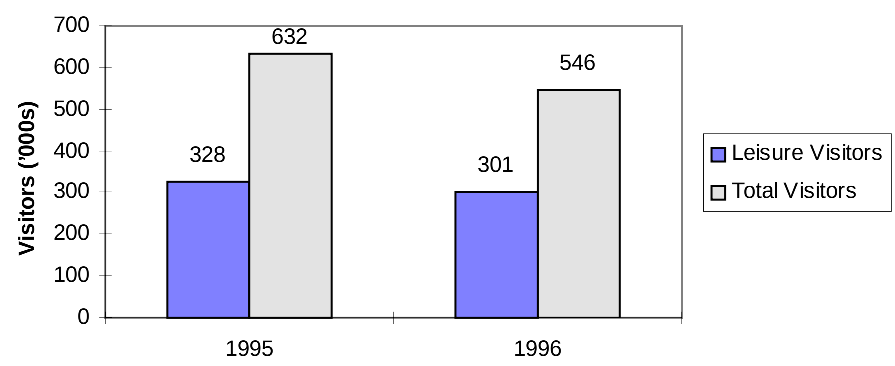
Interstate Visitors

In 1996 interstate visitors to Western Australia declined by 13.6% from 632,000 in 1995 to 546,000. Over 29% of these interstate visitors were on holiday, 29.5% were on business, 25.8% were visiting friends and relatives,while 18.4% were visiting for 'other' reasons (WATC, 1997a).

Factors considered to be the major contributor to the decline were strong domestic competition from other states over the past 5 years, and competition from overseas destinations such as Bali, Fiji and New Zealand.

Further effects are expected due to increases in the cost of interstate holiday tour packages to WA. These have risen 46% over 1996 to the current package price of $583. This exceeds the 'psychological pricing barrier' of $499 to WA from the eastern states and could have a negative impact on the price sensitive segment of the market (WATC, 1997a).

Fig. 4.3.2: Interstate Visitor Trips to WA



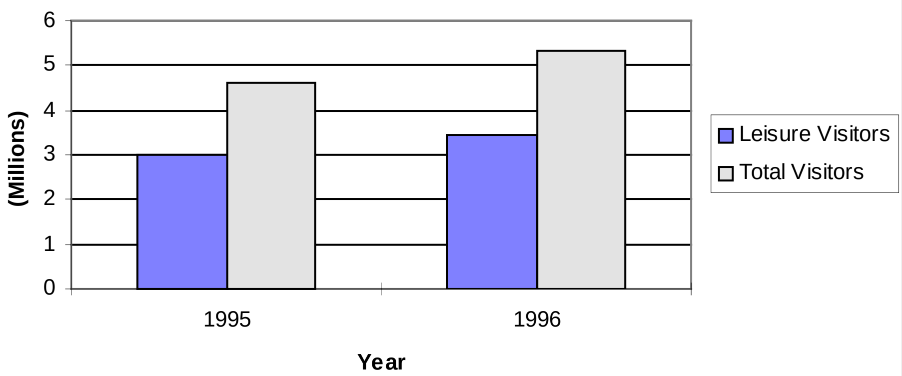
Source WATC, 1997a

Intrastate Visitors

There were an estimated 5.33 million intrastate trips in 1996, a 15.5% increase over the 4.62 million in 1995. Of these visitors, 37.2% were on holidays, 27.4% were visiting friends or relatives, 15.9% were on business and 19.4% were other reasons (WATC, 1997a).

Almost 60% of intrastate trips were made by Perth-based residents who also represented 62% of the 18.4 million visitor nights stayed by this group in 1996 (WATC, 1997a).

Figure 4.3.3: Intrastate Visitor Trips in WA



Source WATC, 1997a

Domestic Tourism Outlook for WA:

The TFC has predicted steady growth for domestic tourism (includes both interstate and intrastate) over the next decade.

The growth in domestic visitor nights stayed in WA is predicted to average 2.0% over the years 1995 to 2005. Thus, visitor nights stayed are projected to increase by nearly 5.6

million in a decade to over 30 million domestic visitor nights in 2005 (TFC, November 1996).

The table below provides a forecast of domestic tourism activity in Western Australia by major purpose of travel to the year 2005.

Table 4.3.1 Domestic Visitor Nights in Western Australia by Purpose ('000s)

Year	Business	Holiday	VFR*	Other	Total	% Change on Previous Year
1994	4242	9957	5914	4252	24365	
1995	4180	9026	6995	4475	24674	1.3
1996	**4465**	**10123**	**6690**	**4510**	**25787**	**4.5**
1997	**4730**	**10377**	**6812**	**4528**	**26446**	**2.6**
1998	**4962**	**10498**	**6930**	**4545**	**26925**	**1.8**
1999	**5149**	**10575**	**7021**	**4560**	**27304**	**1.4**
2000	**5301**	**10648**	**7099**	**4573**	**27620**	**1.2**
2001	**5462**	**10730**	**7217**	**4587**	**27996**	**1.4**
2002	**5653**	**10870**	**7377**	**4603**	**28503**	**1.8**
2003	**5851**	**11060**	**7541**	**4619**	**29070**	**2.0**
2004	**6055**	**11253**	**7708**	**4635**	**29650**	**2.0**
2005	**6267**	**11449**	**7879**	**4651**	**30245**	**2.0**

Figures in bold are forecasts.
***** VFR:- Visit Friends & Relatives

Source: (TFC, 1997)

Total Visitors to Western Australia

Across all sectors, a total of 6.4 million tourists were recorded in WA in 1996 staying almost 34 million nights. 4.2 million were classed as leisure visits. Over 80% of both leisure visitors and tourists were travelling within their own state, with approximately 8% coming from both international and interstate locations (Table 4.3.2).

Table 4.3.2 Visitor Statistics for WA, 1996

	International		**Interstate**		**Intrastate**		**Total**	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Total Tourists (M)	0.529	10.097	0.546	5.434	5.333	18.415	**6.408**	33.946
Leisure Visitors (M)	0.422	-	0.301	-	3.444	-	4.167	-
% of State Total								
Total Tourists	8.2	29.7	8.5	16.0	83.3	54.2	100.0	100.0
Leisure Visitors	10.1		7.2		82.6		100.0	

Source: WATC 1997a

4.4 Tourism in Regional Forest Agreement Areas

Data for tourism and day-tripper activity in Western Australia is gathered by the WATC. An assessment based on postcodes within the RFA area has been made to determine visitors to this area over the two year period of 1995 and 1996. This has then been further sub-divided to determine tourists and day-trippers visiting the forest areas.

Tourism data was compiled by postcode areas into two regions within the RFA area. The first of these two regions corresponds to the combined area covered by the Central and Southern regions, and the second region corresponds to the area covered by the Swan region.

Table 4.4: Annual Visitor Numbers to the Regional Forest Agreement Area[1] (1995 & 1996)

	Combined Central and Southern Regions		**Swan Region**		**TOTALS**	
	Visitor **Nights** (millions)	Visitor **Trips** (millions)	Visitor **Nights** (millions)	Visitor **Trips** (millions)	Visitor **Nights** (millions)	Visitor **Trips** (millions)
Origin						
WA[1]	5.344	1.760	0.696	0.328	6.040	2.087
Interstate	0.675	0.140	0.206	0.028	0.881	0.168
International	0.490	0.082	1.100	0.042	1.590	0.124
TOTAL	6.509	1.982	2.002	0.398	**8.51**	**2.38**

[1] this data does not include day-trippers.
Source: (WATC, 1997c).

An average of 2.38 million visitor trips per annum were made to the RFA area during 1995 and 1996. Of these, international visitors represented 5%, interstate visitors 8% and intrastate visitors 87%.

4.4.1 *Central and Southern Regions*

On average, nearly 2 million visitor trips a year were made to this region and visitors stayed 6.5 million nights annually during the years 1995 and 1996. This equates to approximately 33% of all visitors in WA making a trip to the region. Close to 0.5 million visits by international tourists were made to the region, or 16.1% of all visits by international tourists in WA during 1995 and 1996 (WATC, 1997c).

Of all the visitors, 65% were on pleasure or holiday, 25% were visiting friends and relatives, 5% were on business and 5% were classed as ‘other’. Length of average stay in the region was 3.3 nights (WATC, 1997c).

The majority of visitors (82.0%) travelled by car with 4.3% travelling by bus or coach. The percentage of bus/coach travel was higher for international (8.5%) and interstate (9.3%) visitors (WATC, 1997c).

Visitors to Forests in the Central and Southern Regions

An assessment of activities undertaken by visitors to the Central and Southern regions shows that the forests were a significant attraction; 18.3% of all visitors, or approximately 363,500 per year, stated they had visited karri or jarrah forests. The forests were especially attractive to international and interstate visitors, of which 45.5% and 43.2% visited forest areas, respectively. The number of day-trips made to the jarrah and karri forests of the Central and Southern regions are estimated to be 208,500 making a total of 572,000 trips by visitors to the forest per year (WATC, 1997c).

Annual visitor statistics collected by CALM show a total of 1,159,800 visits by people each year to sites in the forests of the Central and Southern Regions (average over three years; 1994/95 to 1996/97 – see Appendix 2). This figure is double the above WATC estimate. However, the CALM figures are site specific, and include the counting of one visitor going to more than one forest site in the region. Therefore, on the basis of WATC figures of 572,000 forest visitors per year, visitors to forest areas are on average visiting two forest sites per trip.

An assessment of other major activities associated with all visitors to the Central and Southern Regions shows that 58.1% drive to sightsee or just for pleasure, and 50.6% undertake some form of bushwalking/hiking/walking (WATC, 1997c). Other data shows that the majority of forest visitors stay at key tourist nodes throughout the south west region (Mandurah, Bunbury, Busselton, Dunsborough, Margaret River, Augusta, Pemberton and Albany), and made trips to the forests from there. This suggests that the forest landscapes have a broad scenic appeal and form an integral part of the whole tourism package that attracts visitors to the Central and Southern Regions.

Expenditure

The average annual expenditure in the Central and Southern Regions during 1995 and 1996 was $250 million. While the majority of this (77%) was associated with Western Australians travelling within their own State ($192 million), 13% was associated with interstate travellers ($33 million) and 10% was associated with international travellers ($25 million) (WATC, 1997c).

Major areas of expenditure were food and beverages, accommodation, petrol, and shopping. International visitors spent on average $52 per night, interstate $48.5 per night and WA visitors $35.8 per night, representing an average visitor expenditure of $38.35 per night (Table 4.4.1).

Table 4.4.1 Expenditure by Category and Origin ($ per visitor night)

CATEGORY	ORIGIN WA	Interstate	Overseas	Average
Accommodation	9.27	13.29	10.81	9.81
Car Hire	0.22	6.96	5.33	1.31
Car Service/Repairs	0.47	0.68	0.44	0.49
Conference Fees	0.13	n/a	0.04	0.14
Day Tours	0.26	0.75	1.13	0.37
Entertainment	0.95	1.67	2.15	1.11
Food/Drink	12.35	14.01	16.05	12.80
Local Transport	0.06	0.36	n/a	0.14
Petrol	6.20	4.57	3.87	5.85
Shopping	4.81	4.55	8.29	5.05
Sport	0.37	0.52	0.97	0.43
Other	0.74	0.85	2.19	0.86
Total Expenditure	35.81	48.52	52.01	38.35

Source: (WATC, 1997c).

This $250 million per annum spent by visitors to the region can also be categorised by the purpose of the trip (Table 4.4.2).

Table 4.4.2 Expenditure by Purpose of Trip ($ million per annum, 1995 & 1996)

Purpose of Trip	**$M**	**% Total**
Pleasure/Holiday	166	66.5
Visiting Friends/Relatives (VFR)	42	16.8
	208	83.3
Conference	4	1.6
Business	23.5	9.4
	27.5	11.0
Passing Through	2.8	1.1
Other	11.4	4.6
Total	249.6	100.0

Source: (WATC, 1997c).

This indicates that over 83% of expenditure is from tourists while 11% is associated with business activities.

The total expenditure can also be broken down by the percentage of travellers who specifically visit karri and jarrah forests. Expenditure by people visiting the forest areas is close to the average expenditure level across all activities. This indicates that international visitors spent $6.2 million, interstate visitors spent $9.9 million, and intrastate visitors spent $28.1 million. On this basis it is estimated that visitors to jarrah and karri forests were associated with bringing in $44.2 million per year of tourist expenditure to the combined Central and Southern Forest Regions for 1995 and 1996.

4.4.2 *Swan Region*

During 1995 and 1996, 397,000 trips a year were made to this region and visitors stayed 2 million nights. This amounts to approximately 7% of all visitors in WA making a trip to the region. Only 41,000 international tourists a year visited the region, or 8.2% of all international visitors to WA during 1995 and 1996. People making daytrips to the Swan Region are not included in this data (see section 4.4.3).

Of all the visitors, 69.0% were on pleasure or holiday, 25% visiting friends and relatives, 3% on business or conference and 3% classed as 'other'. Length of average stay in the region was 5.0 nights.

An assessment of activities indicates that only 0.6% of international visitors, 21.2% of interstate visitors and 9.4% of intrastate visitors stated they had visited the jarrah forests in the Swan Region, although many more made day-trips to the forests. Tourists visiting the forest areas during the years 1995 and 1996 were associated with bringing in $3.5 million of tourist expenditure per year to the region.

4.4.3 *Day-trippers in the RFA area*

Over 3.9 million individual visitor trips as well as 1.3 million group trips a year were made to the RFA area during 1995 and 1996. These day-trippers are estimated to have expended over $70 million a year.

Table 4.4.3 Annual Day Trip Visitors and Expenditure in Regional Forest Areas (1995 and 1996).

	Combined Central and Southern Forest Regions	Swan Forest Region	Total
Group Trips (millions)	0.818	0.525	1.343
Visitor Trips (millions)	1.670	2.262	3.932
Expenditure ($M)	**22.17**	**48.17**	**70.34**

Source: (WATC, 1997c).

Statistics on day trip activities indicate a yearly total of 411,500 or 10.5% of these day-trippers visited the jarrah and karri forests across the RFA area. Visitations were almost equally divided between the Swan Region (203,000) and the combined Central and Southern Regions (208,500). Expenditure by people visiting the forest areas is close to the average expenditure level across all activities. On this basis, day-trip expenditure associated with the forest areas during the years 1995 and 1996 is estimated at $7.4 million annually.

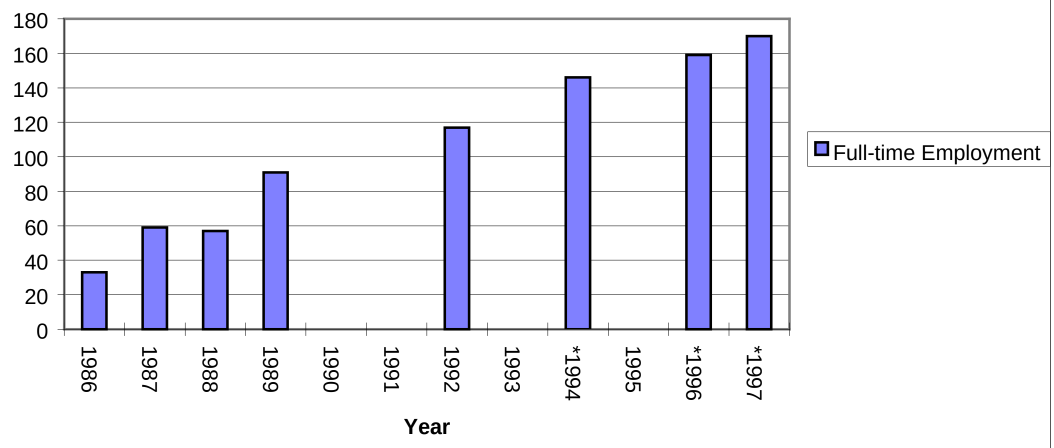
98% of day-trippers visiting the Swan Region came from the metropolitan area, while visitors from the metropolitan area made up 68% of day-trippers to the Central and Southern forest regions. Over 95% of all day-trippers travelled by car.

4.5 Tourism Case Study on Pemberton

Data was collected from 60 tourism-related businesses in and around the town of Pemberton to highlight possible changes in employment and investment over time through comparison with an earlier study.

Employment in the tourism industry in Pemberton in 1997 is estimated to be 87 owner/operators, 83 full-time employees and 148 part-time and casual employees, totalling 318 people. The total hours worked per week by these 318 people equates to an estimated 233 full-time equivalent (FTE) employees. This is an increase in the total number of people employed on 1996 of 43 people (or 25 FTE). The number of people employed full-time in tourism in Pemberton has increased at 12.9% per annum from 57 in 1988 to 170 in 1997 in (including owner/operators).

Figure 4.5: Full-time Tourism Employment in Pemberton, 1986 - 1997



Employment in Pemberton's Tourism Industry (1986 - 1997)

Year	1986	1987	1988	1989	1992	1994*	1996*	1997*
Full-time	33	59	57	91	117	146	159	170
Part-time	40	66	96	127	151	-	116	148

* The years of 1994, 1996 and 1997 were collated using employment generated directly from tourism. The years from 1986 to 1992 were collated using full employment in tourism-related businesses and so includes non-tourism vineyard employment. This accounts for a proportion of the increases due to vineyard expansions during these years (particularly seasonal and casual from grape-pickers). 1994 full-time data has been estimated by taking out non-tourism vineyard employment based on data from wine industry.

Investment in tourism enterprises is estimated to be almost $35 million over the past 15 years. The estimated current value (1997 dollars) of these businesses is between $52 and $58 million dollars. In 1992, the estimated value was $30 million, and in 1994, $46 million. Planned investment over the next five years by the current tourism operators in Pemberton is expected to be over $15 million and potentially as high as $17.7 million. Tourism investment from new enterprises can also be expected to occur over the next twenty years as new operators set up in this growth area.

Some of the perceived constraints to business as they pertained to forests were:

- Concerns over the number of sites in the forests around Pemberton being used at close to, or at capacity during the high volume tourist periods. A perceived need by tourists seeking a wilderness experience to have access to new sites and forest areas in the future to cater for greater demand (particularly old growth forest areas).

- The threat of future logging operations occurring next to or near existing businesses or in areas of forest currently used by tourist operators, and the downturn in business that would result (lack of security). Logging operations/clearfelling are also seen to be reducing the tourism potential of Pemberton because of tourism's dependence on the forest as a scenic, recreational and educational resource.

5.0 STRATEGIES AND DEVELOPMENT PLANS

5.1 Expected Growth in Forest-based Tourism

It is necessary to scope the potential tourism demand during the RFA period in order to estimate its impact on the study area. While there are no published growth estimates available for forest-based tourism, general growth predictions are available for nature-based tourism and ecotourism. These range up to 20 to 30% per annum (Box 5.1). However, these are estimated from a small base and have limited application to the RFA area. For this reason, growth data has been estimated, based on predicted levels for each market segment (see sections 5.1.1 to 5.1.5).

Box 5.1 Growth Predictions for WA Nature-based Tourism

- 25-30% over the next decade for nature-based tourism world-wide
(Western Australian Tourism Commission, 1997a).

- 20% per annum for ecotourism in Western Australia (Shea, 1993).

Growth can be stimulated by marketing campaigns. The WA Government has recently embarked on a 'Brand' marketing campaign in overseas which will develop further on the Australian Tourism Commission's marketing of Australia's 'Great Outdoors'. These campaigns are particularly well suited to attracting visitors to the ecotourism potential which is offered by Western Australia's forest areas.

5.1.1 International Tourists

Western Australia attracts between 12-13% of the international visitors who come to Australia (WATC, 1997a). Assuming this remains constant, then based on the TFC's estimate for long term growth into Australia, international visitors will increase by 7.8% per annum. Applied over the 20 year period of the RFA, the number of trips made by international visitors to the karri and jarrah forests can be expected to increase from 37,500 in 1996 (section 4.2.2) to 196,000 by 2018 (approximately five times). The majority of these visits are likely to be to the Central and Southern Forest Regions.

5.1.2 Interstate Tourists

Predictions by the Office of National Tourism (1997) indicate that Western Australia can expect the interstate market to increase at an annual rate of 2.0% over the next decade. On this basis, the number of trips to the forests made by interstate visitors will have increased from 66,500 in 1996 to 103,000 in 2018. The majority of these visits are also likely to be to the Central and Southern Forest Regions.

5.1.3 Intrastate Tourists

Over the 20 year period of the RFA, growth in intrastate tourism is expected to range between the long term population growth rate of 1.5%, to a 2.0% increase per year (TFC, 1997). This suggests that intrastate tourism will increase from 297,000 in 1996 to between 412,000 and 459,000 in 2018.

5.1.4 Day-trippers

If visits by day-trippers to the forest areas are estimated to increase in conjunction with population growth (estimated at 1.5%) over the 20 year RFA period, then they will increase from 411,500 in 1996 to 571,000 in 2018.

5.1.5 Overall Growth Estimate

Based on the above estimates, the overall number of visits to the RFA area is predicted to increase from 812,500 in 1996 to between 1.28 and 1.33 million in 2018. Based on current trends, 67% will visit the forests in the Central and Southern Regions and only 33% those in the Swan Region.

However, when compared to growth figures recorded by local tourist bureaux over the past 6 years, these estimates may be considered conservative and represent a baseline growth figure. Over the years 1991-1996, the number of tourists visiting the tourist bureaux in the south west region have shown an annual growth of around 11.5% per annum.

	1991	1996	Total Increase (%)
Margaret River	125,770	225,353	79.2 (12.4% pa)
Pemberton	54,675	89,923	64.5 (10.5% pa)
Nannup	15,221	21,900	43.9 (7.5% pa)

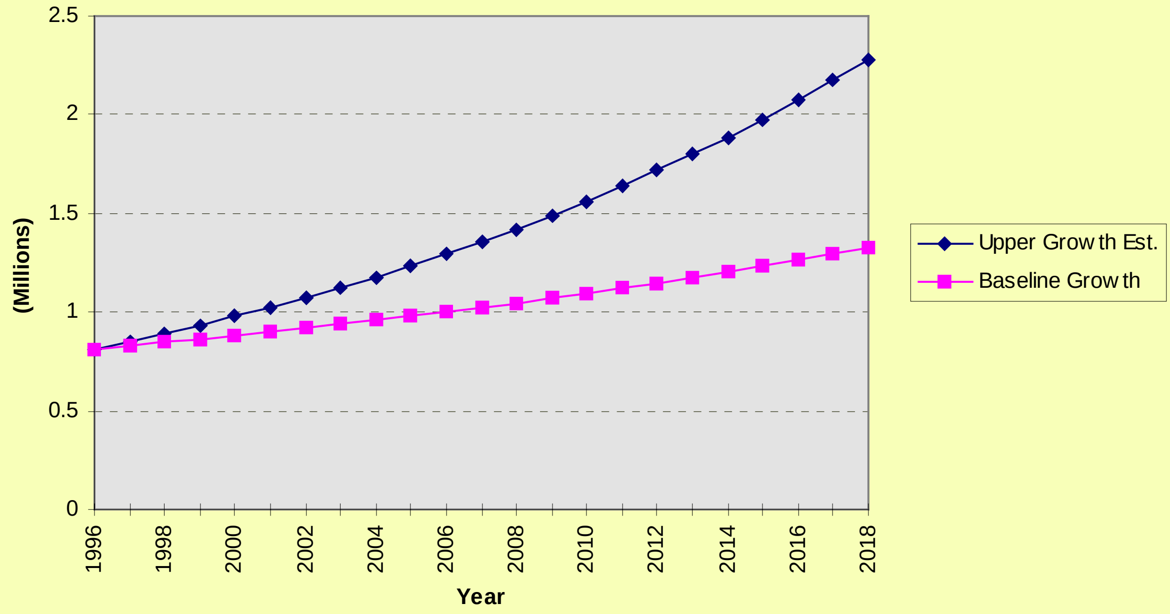
Source: Local Tourist Bureau Statistics

A higher level of growth is also reflected in the tourism employment figures shown in the Pemberton survey (Section 4.5).

These growth rates together with predictions for nature-based tourism (Table 5.1) indicate a potential for growth in the number of forest visits to continue at higher than average tourism rates throughout the RFA process. Should the long-term growth rate of visitors average 4.8% per annum (approximately 40% of the local tourist bureau figures) then the total number of visits by tourists and day-trippers to the karri and jarrah forests in the RFA region would be expected to be up to 2.3 million visits by the year 2018. Visits made by Western Australians travelling within the State, and daytrippers to the forests would account for the majority of this growth over the next 20 years in the south west region. Any short-term reductions to international tourism that may occur from reduced economic growth in Asian economies are not expected to impact significantly on these growth estimates.

These growth estimates, together with an estimate based on CALM’s visitor statistics that tourists on average visit 2 forest sites per trip, offers a range within which it may be reasonable to plan for tourism demand.

Figure 5.1: Estimated Growth in Number of Visits Made to the RFA Forests

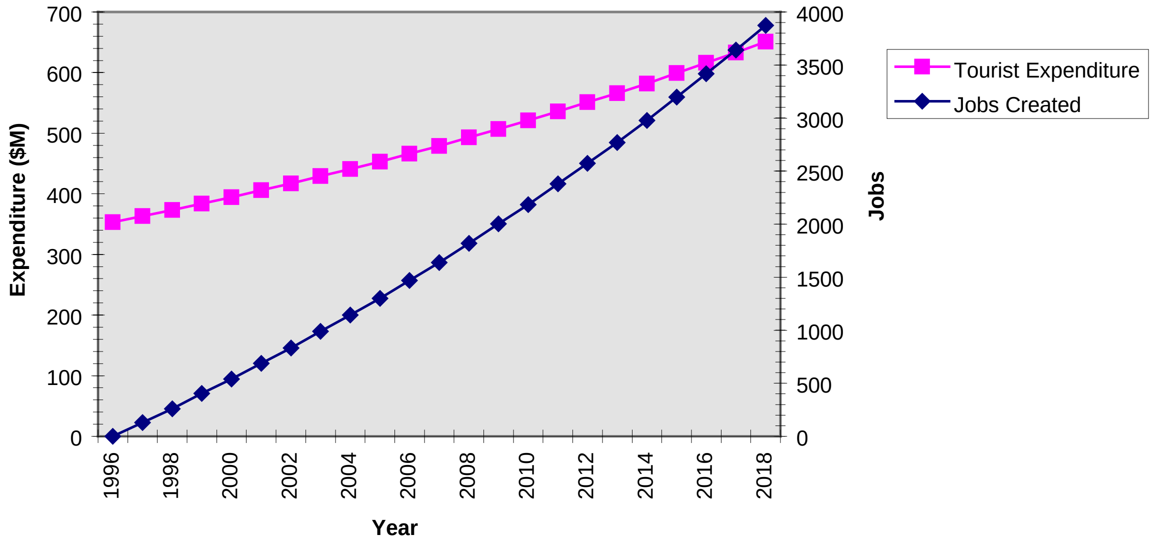


5.2 Expected Growth in Tourist Expenditure and Employment

Using estimates of future visitor numbers and nights it is possible to estimate corresponding increases in tourist expenditure, based on current expenditure patterns. From this data, and WATC's estimate that for every additional $1 million spent in Western Australia by tourists, 13 new jobs are created in the economy when compared to the previous year, it is possible to estimate the likely employment generated from the increased tourism. These statistics provide only a broad indication of the potential economic changes over the 20 year RFA period from tourism.

Current tourist expenditure in 1995/96 in the RFA Region is $353 million per annum. This would be expected to increase to $651 million by 2018, a total increase of almost $300 million. Such an increase would generate up to 3,900 additional jobs throughout the economy, based on the WATC job creation estimate. Some 3,100 of these jobs might be located in the combined Central and Southern Regions (Appendix 3).

Figure 5.2 Tourist Expenditure and Jobs Created 1996 - 2018



The total annual expenditure associated with tourists who visited karri or jarrah forests in the RFA area during 1995 and 1996 is estimated to be $55.1 million (see sections 4.4.1 to 4.4.3). In 2018, this is predicted to almost double to $107.2 million per annum. The majority of this (88%) would be expected to come from visitors to the Central and Southern Regions (Table 5.2.1 & 5.2.2). This increase in expenditure is estimated to create an additional 680 jobs in the forest regions during the 20 year period.

5.3 Development Planning

A wide range of factors need to be considered when planning strategies for tourism development in forest areas. CALM, as the manager of public forests, must continue to play a lead role in ensuring tourism development is compatible with other uses of the forest and is sustainable. While some recreation and tourism activities require broad areas of forest, it is worth noting that most high-use tourism facilities in forests involve site-based or corridor-based activities.

Developers (both private and government) need to provide appropriate facilities for the wide range of tourism and recreational interests including camping areas, picnic sites, walk trails, roads, information centres and major tourism attractions. In addition to these forest-based facilities, support infrastructure such as a wide range of accommodation, roads, utility supplies and complimentary tourism attractions (vineyards, adventure experiences, restaurants, fishing, etc) are required. These developments need to take into consideration the expected tourism growth in tourism generally and in the specific market niches.

Any proposed tourism development aimed at meeting expected tourism growth should be ecologically sustainable to ensure that the resource on which it is based is not degraded. Any such consideration would also need to involve consultation with key stakeholders, particularly in relation to key areas of growth and the facilities required to support this growth.

Forest-based tourism clearly needs to be compatible with other uses. This would be facilitated by ensuring that future forest management plans involve greater consideration of tourism issues. To this end a forest-based recreation and tourism advisory group is being formed to assist CALM in the development of tourism and recreation initiatives.

Nature-based tourism in forest areas can and does operate across tenures and through different forest types and age structures and will need to continue this to provide the range of tourism products to meet the growth in tourism to the area.

5.4 Development of Facilities

Because of its regional focus and significant local impacts, tourism requires local strategic planning and management. Recent Federal Government policies have focused on tourism as a means of regional development.

However, tourism is not expected to be the salvation of every depressed regional centre in Australia. The efficient functioning of tourism systems requires planning for the development of core ‘nodes’, which inevitably correspond to major transport hubs and are urban based.

In Western Australia the hub is Perth as this is the entry point for most international and interstate visitors. Regional tourism destinations are fed from the hub. However, there is a strong distance-decay relationship between core areas and regional destinations. Other factors influencing the extent of tourism include proximity to population centres, landuse and ownership, and the diversity of available opportunities.

An important aspect of facilitating tourism development is to encourage investment in tourism infrastructure from local, interstate and overseas groups. The availability of major attractions or facilities can act as a significant draw for tourism into a regional area. Such developments are based on implementing the concept that wealth/employment can be created from natural assets while conserving the assets on which they are based.

5.4.1 CALM - Development of Tourism and Recreation Facilities in Forest Areas

CALM, as the government agency responsible for managing the public forests, is the major developer of sites and facilities within forest areas. Community demands for recreation and tourism opportunities in forest areas is reflected in CALM’s enabling legislation. Meeting these demands has been established as a major objective for forest regions.

Planning is undertaken for forest recreation, forest tourism and community education and interpretation. CALM ensures that forest-based tourism and recreation planning is managed and developed appropriately through guiding principles and strategies (CALM, 1992).

Current major projects include:

Swan	Central	Southern
• Hills Forest • Bibbulmun Track redevelopment • CALM Alcoa Forest Enhancement Program • Lane Poole Reserve • Recreation Plan - Hedges Goldmine • Numerous Picnic pull-over sites • Forest Heritage Centre	• Demonstration Forest - Wellington Mills • Bibbulmun Track redevelopment • Caravan Parks - Waroona, Logue Brook • Wrights Bridge, Blackwood • Three camps - Lewana - Wellington Mills - Myalup	• Climbing Trees: - Diamond - Bicentennial • Great Forest Trees Drive • Valley of the Giants • Big Brook, Founder Forests • Perup Discovery Centre • Bibbulmun Track redevelopment

In addition to these projects, CALM is developing and evaluating the effectiveness of demonstration forests at Collie, Manjimup, Margaret River, Dwellingup, and Mundaring. This project aims to enhance community awareness and understanding of forests and forest management.

A 'user-pays' system is being introduced to recoup some operational costs and provide for maintenance and ongoing development of facilities. A directory of investment opportunities is also being developed for the forest areas and these are pursued both directly by CALM and in conjunction with the private sector. Other opportunities in 'value-adding' and nature conservation programs are also being progressed.

5.4.2 Regional Development Commissions

The Regional Development Commissions are encouraging sustainable tourism development opportunities and forest-based attractions. For example, the South West Development Commission is recognising the value of forests to tourism and recreation through the development of the South West Ecomuseum, including forest-based attractions at Wellington Mill, Greenbushes, Perup, Pemberton, Quinninup and the Blackwood River Corridor.

5.4.3 Ministry of Sport and Recreation

The Ministry of Sport and Recreation, in conjunction with the Lotteries Commission has established a 'Trailswest' program which assists regional and local groups with funding and guidance to develop a Statewide network of recreational trails. These trails are being developed for a range of users and will provide increased access to forest areas and help to satisfy the growing demand for outdoor recreation in Western Australia.

6.0 POTENTIAL AREAS OF CONFLICT

Within the RFA area the tourism industry co-exists with many other important industries, including mining, agriculture, forestry, fisheries, and manufacturing. There are, however, a number of areas where tourism and tourism development can conflict with local groups and with other forest users. For example, some operators in the industry hold the view that protection of old growth forest is required for tourism and that the short-term impact of timber harvesting and burning on aesthetics affects tourism. Others in the community feel that tourist growth could affect existing lifestyle and qualities of the community.

It is inevitable that conflicts will continue where disparate interests are concerned. These could be ameliorated through added emphasis on open and consultative planning for tourism in forest areas.

6.1 Potential Conflicts Between Tourism and other Forest Uses

Nature-based tourism opportunities in the South West are widely distributed over a variety of tenures which include:

- conservation parks
- national parks
- state forest
- various Crown reserves
- vacant Crown land
- leasehold lands, and
- privately owned lands.

Co-ordination between local and State Governments, the tourism industry and private land owners is therefore needed to ensure that appropriate products are developed and infrastructure is provided.

Not all nature-based tourism relies on access to public land. CALM, however, as the provider of access to public land, has joint responsibilities with industry in the setting of standards and literature development.

Environmental guidelines are required in the tourism industry. Environmental protection issues are relevant in nature-based tourism in the maintenance and enhancement of the region's environmental, social and economic assets. The maintenance of lifestyle and protection of the region's natural and cultural attributes are also fundamental to and underpin any form of development in the south west of Western Australia.

Tourism development in natural settings can only be sustainable if the land resource is not degraded. One approach in natural areas is to contain facilities and activities to specified areas rather than allowing dispersion of development and/or activities throughout a region. This has been recommended in the South West Regional Tourism Strategy (ERM Mitchell McCotter, 1995) to ensure products are located where they do not pre-empt areas more suitable for other types of development or environmental preservation.

There is a need to ensure that appropriate development within natural settings in the south west is monitored and controlled to maintain the resources which form the basis of nature-based tourism products. Environmental protection is currently monitored under the Environmental Protection Act, the CALM Act, and indirectly through conditions imposed by other government agencies and management plans.

7.0 REFERENCES

Department of Conservation and Land Management (1987a), Regional Management Plan 1987-1997, Northern (Swan) Forest Region , CALM.

Department of Conservation and Land Management (1987b), Regional Management Plan 1987-1997, Central Forest Region, CALM.

Department of Conservation and Land Management (1987c), Regional Management Plan 1987-1997, Southern Forest Region, CALM.

Department of Conservation and Land Management (1992), Draft Management Strategies for the South West Forests of Western Australia, CALM.

Department of Conservation and Land Management (personal communication, 1997), statistical data from Colin Ingram, Manager Park Policy and Tourism Branch, CALM, Como WA.

ERM Mitchell McCotter (1995) South West Regional Tourism Strategy, Final Report

Hutchinson, J. (1997) "Getting it Right for the Millennium", a report to the Hon. John Moore MP, Minister for Industry, Science, and Tourism, providing industry input to the development of the National Tourism Plan, October 1997.

Industry Commission (1996), "Tourism Accommodation and Training," Industry Commission Report No 50.

Shea S (1993), Sustainable Management of Forests for Multiple Benefits.

South West Development Commission (1997) statistical data, personal communication from Graham Hodgson, Acting Manager Regional Economic Development, SWDC, Bunbury.

Tourism Forecasting Council (November, 1996), "Steady Growth for Domestic Tourism," Forecast; the fifth report of the Tourism Forecasting Council, vol3, no.1.

Tourism Forecasting Council (June, 1997), Forecast; the sixth report of the Tourism Forecasting Council, vol3, no.2.

Western Australian Tourism Commission (personal communication, 1997) statistical data, personal communication from Michael Milbourne, Research Database Coordinator, WATC, Perth.

Western Australian Tourism Commission (1997a), Research Brief on Tourism, June 1997.

Western Australian Tourism Commission (1997b), Tourism Development Register, June 1997.

Western Australian Tourism Commission (1997c), Research Database - unpublished data, June 1997.

Western Australian Tourism Commission (1997d), Tourism Industry Development Division Database - unpublished data, June 1997.

Western Australian Tourism Commission and Department of Conservation and Land Management (1997), A Nature Based Tourism Strategy for Western Australia. Report prepared by the Nature Based Tourism Advisory Committee, 32 pp.

8.0 APPENDICES

1 Tourism Forecasting Council - Actual and Projected International Visitor Arrivals to Australia

2 CALM data - Visitors to Forest Sites

3 Actual and Projected Tourism Expenditure

APPENDIX 1 Actual and Projected International Visitor Arrivals to Australia

Table 1 Actual and Projected International Visitor Arrivals to Australia ('000s)

	ORIGIN							
YEAR	NORTH AMERICA	EUROPE	NEW ZEALAND	JAPAN	OTHER ASIA	REST OF WORLD	TOTAL	% CHANGE BY YEAR
1990	304	549	418	480	348	116	2215	6.5
1991	325	531	481	529	389	116	2370	7.0
1992	312	577	448	630	506	131	2603	9.8
1993	332	637	499	671	704	154	2996	15.1
1994	344	721	480	721	927	169	3362	12.2
1995	363	752	538	783	1118	172	3726	10.8
1996	378	799	672	813	1311	192	4165	11.8
1997	**403**	**838**	**685**	**850**	**1489**	**206**	**4471**	**7.3**
1998	**416**	**883**	**693**	**929**	**1686**	**222**	**4829**	**8.0**
1999	**436**	**961**	**702**	**1026**	**1897**	**242**	**5265**	**9.0**
2000	**475**	**1040**	**747**	**1134**	**2109**	**266**	**5771**	**9.6**
2001	**509**	**1113**	**756**	**1241**	**2335**	**287**	**6241**	**8.1**
2002	**533**	**1194**	**765**	**1327**	**2585**	**309**	**6714**	**7.6**
2003	**541**	**1283**	**775**	**1399**	**2865**	**331**	**7194**	**7.2**
2004	**551**	**1379**	**784**	**1448**	**3169**	**354**	**7685**	**6.8**
2005	**562**	**1481**	**794**	**1495**	**3501**	**378**	**8212**	**6.8**
2006	**586**	**1604**	**803**	**1557**	**3877**	**407**	**8834**	**7.6**

- Figures in bold are forecasts.

Source: TFC, June 1997

Average Annual Growth (%) 1996-2006 by Country of Origin

NORTH AMERICA	EUROPE	NEW ZEALAND	JAPAN	OTHER ASIA	REST OF WORLD	Total Average Annual Growth (%)
4.5	7.2	1.8	6.7	11.5	7.8	7.8

Source: TFC, June 1997

APPENDIX 2: CALM Data - Visitors to Forest Sites

2.1 Visitor Levels to CALM Sites in Forest Areas in the Swan Region

District/Park	Total Visits (to the nearest '000)				
	1992/93	1993/94	1994/95	1995/96	1996/97
Avon Valley	14	13	8		
Fred Jacoby Park	89	83	83	83	83
Gooralong	27	27	27	27	27
John Forrest	135	128	123	122	132
Lane Poole Reserve	170	178	185	184	206
Serpentine	74	74	82	103	90
Walyunga	62	66	60	56	51
Yalgorup		67	71	69	75
Forest Heritage Centre					6
Hills Forest Sites		250	250	250	250
Lesmurdie Falls		75	75	75	75
Gooseberry Hill		50	50	50	50
Rocky Pool, Hovea		40	40	40	40
Outside of Recreational Area		30	30	30	30
Greenmount		30	30	30	30
Kalamunda		20	20	20	20
Totals	**571**	**1,131**	**1,134**	**1,139**	**1,165**

2.2 Visitor Levels to CALM Sites in Forest Areas in the Central Region

District/Park	Total Visits (to the nearest '000)				
	1992/93	1993/94	1994/95	1995/96	1996/97
Busselton:					
Blackwood River	46	45.5	45.5	28	28
Bob's Hollow		5	5	5	5
Cosey Corner Rd		12.5	12.5	12.5	12.5
Margaret River	6	6	6	6	6
Other State Forest Area	2	1.8	1.8	1.8	1.8
Tuart Forest Area	6	6	6	6	6
Scott River NP	4	4	4	4	4
Leeuwin Naturaliste National Park:					
Boranup	34	30	30	15	22
Canebreak Pool				5	5
Chapman Pool				7	7
Conto	69	94	94	99	85
Sue's Bridge				11	11
Ten Mile Brook				5	5
Tuart Drive				167	167
Collie	206	117	113	109	110
Kirup	11	13	11	11	11
Harvey	112	43	49	52	58
Nannup	9	9	9	9	9
Totals	**505**	**3,868**	**3,868**	**5,533**	**5,533**

2.3 Visitor Levels to CALM Sites in Forest Areas in the Southern Region

District/Park	Total Visits (to the nearest '000)				
	1992/93	1993/94	1994/95	1995/96	1996/97
Manjimup:					
Four Aces	20	18	17	18	18
Diamond Tree	22	24	20	36	36
King Jarrah	9	5	5	5	5
Glenoran Pool & One Tree Bridge	6	15	15	15	15
Chappels Bridge		.5	.5	.5	.5
Chindalup Pool		1	1	1	1
Greens Island		.5	.5	.5	.5
Perup Field Centre		1	1	1	1
Walk Trails	14				
Pemberton:					
Big Brook	16	16	20	20	20
Gloucester Tree	160	162	190	139	134
Shannon M/Use	9	8	7	7	7
Shannon Information Centre	14	13	10	10	10
Warren National Park		15	40	36	35
Cascades (Gloucester National Park)		50	50	50	50
Beedelup National Park		50	50	50	50
Walpole:					
Valley of the Giants	113	116	128	(site closed)	210
Knoll Drive	62	62	61	62	62
Hilltop Road	21	27	30	37	37
Conspicuous Beach	10	11	13	15	15
Fernhook Falls	11	8	12	13	13
D'Entrecasteaux National Park:					
Mandalay Road	10	14	16	18	18
Black Point North	3	3	3	3	3
Black Point South	4	4	4	4	4
Lake Jasper	2	2	2	2	2
Totals	**506**	**626**	**696**	**543**	**747**

Source: CALM (VISTAT Database)

Note: Blank entries indicate no monitoring performed at that site in that year. Rounded entries in adjacent cells have been extrapolated based on field advice of visitation trends.

APPENDIX 3: Actual and Projected Tourism Expenditure

Table 4.1: Combined Central and Southern Regions Expenditure (1996-2018) (1996$M)

	1995/96	2004	2018	% visit forest	$M from forest visitors in 2018
WA	191	225	291	14.7%	42.8
Interstate	33	38	49	30.0%	14.7
International	25	52	138	24.7%	34.1
Day-trippers	22.2	25.3	30.7	7.5%	2.3
TOTAL	**272**	**339.3**	**508.7**		**93.9**

Table 4.2: Swan Region Expenditure(1996-2018) (1996$M)

	1995/96	2004	2018	% visit forest	$M from forest visitors in 2018
WA	19.6	23.9	30.9	9.4%	2.9
Interstate	7.5	9.2	11.9	21.2%	2.5
International	5.8	12.4	32.9	0.6%	0.2
Day-trippers	48.2	55.1	66.9	11.5%	7.7
TOTAL	**81.1**	**99.6**	**142.6**		**13.3**

Table 4.3: Total Expenditure and Employment Creation - All RFA regions (1996-2018)

	1995/96	2004	2018	$M from forest visitors 1995/96	$M from forest visitors in 2018
Estimated expenditure (1996$M)	**$353**	$441	**$651**	$55.1	**$107.2**
Cumulative change in expenditure		+$88	**+$298**		
Potential number of jobs created		1,144	**3,874**		