

6 Tourism and recreation

6.1 INTRODUCTION

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 forests users.

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:

- domestic tourists—those travelling within their own country, both interstate and intrastate; and
- international visitors—those travelling outside their home country.

In addition to those travellers who stay overnight, the United Nations Economic and Social Council, World Tourism Organisation 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 and 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.

Management and promotion of nature-based recreation and tourism in the RFA area

Tourism and recreation have always been important uses of forest areas (see Map 4). 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 major contributors to the ongoing development of recreation sites. In its role as the State’s forest manager, CALM has developed a wide range of nature-based recreation and tourism areas and facilities. These range from day use and camping areas to major attractions such as the Tree Top Walk at the Valley of the Giants east of Walpole. Other contributors include the local shires and regional development commissions. The Ministry of Sport and Recreation is also providing funds to help regional and local groups develop trails for a range of users from bushwalkers, families and occasional walkers to trails for mountain bikes and equestrian use.

Forest-based tourism is promoted by individual operators, the Western Australian Tourism Commission, tourist bureaux, development commissions, regional tourism associations, CALM and local shires. This local marketing thrust is also supported by the Australian Tourism Commission’s promotion of Australia’s “Great Outdoors”.

6.2 TOURISM AND RECREATIONAL FACILITIES IN THE FOREST AREA

The forest is one of the cornerstones of tourism in the south-west. This area of the State is the only place where forests are found in abundance in close proximity to a large population. The perception by tourists as they drive through the region is that it is an area which is heavily forested, as one of the main views from the vehicle is of trees. The feeling of the region is of lush, green forest. The forest area is where tourists come to recreate whether it is to walk in the forest, camp out or stay in chalets and resorts under the canopy of trees.

The RFA area can be considered in the three CALM forest regions—Swan, Central Forest and Southern Forest. Each of these regions can then be sub-divided into three tourist and recreation sectors.

Swan Forest Region

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 resources 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 as 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.

Northern Swan sector

This sector includes 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

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

It includes 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, etc.) and has many arts and crafts studios.

Peel forest sector

This section has four major reservoirs on the Canning, Serpentine, North Dardalup and South Dandalup rivers and includes the towns of Dwellingup, Boddington and Jarrahdale. Major recreation areas include 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;
- Hotham Valley Tourist Railway;
- Boddington Rodeo—an annual event which takes place on the first Saturday of November and attracts riders from all over Australia;
- Bibbulmun Track and other walk trails being developed by CALM and the Serpentine-Jarrahdale shire councils.

Central Forest Region

The Central Forest Region is divided by CALM into three districts as follows:

Mornington

The district's major forest-based attractions are associated with the waterways, especially Wellington Dam, 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.

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, plus the Blackwood River itself. Nannup is also a centre for the timber milling industry.

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 nature-based attractions, including the forest area. Boranup karri forest in the Leeuwin-Naturaliste National Park offers 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 and Canebreak picnic area along Brockman Highway. Local walk trails include the Augusta-Busselton heritage trail and short walk trails adjacent to the picnic areas.

Southern Forest Region

The Southern Forest Region has a considerable amount of nature-based tourism focused on rivers, pools, State forest conservation areas, tourism drives and major forest features. CALM divides the region into Manjimup, Pemberton and Walpole districts.

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 trout and cobbler.

Pemberton

The Pemberton district includes Warren, Beedelup, D'Entrecasteaux 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, major forest-based scenic attractions, marron and trout farms, recreational and adventure-based tourism, vineyards and scenic drives and a wide range of accommodation.

Walpole

The Walpole district is bounded by 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.

6.3 OPERATORS USING THE FOREST AREA

A wide range of tourism operators is licensed by CALM to operate in 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, six in the Swan Forest Region, 26 in the Central and Southern forest regions, nine north of the RFA area and 15 interstate. The activities offered by these operators are set out in Table 6.1.

Table 6.1 Number of licensed operators offering specific activities

Activity	Number of operators
Aboriginal culture	10
Abseiling	20
Birdwatching	17
Bushwalking	53
Camping	54
Canoeing	21
Caving	21
Coach tours	16
Cycling/mountain bike riding	6
Day tours	28
Fishing	5
Forest heritage	7
Four-wheel drives	34
Horse trails	4
Mini-bus tours	5
Orienteering	3
Photography	7
Rafting	13
Rock climbing	14
Safari tours	10
School program	19
Scientific	5
Sightseeing	45
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 and self-contained accommodation, caravan parks, camping areas, restaurants and cafes. There are also organisations offering tourist attractions such as vineyards, adventure experiences, train and tramways, art and fine wood galleries, fish farms and wildlife parks.

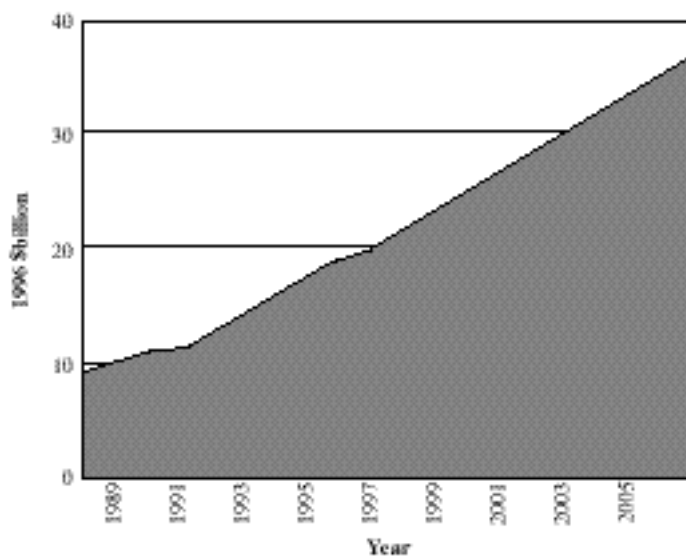
6.4 ECONOMIC IMPACTS OF TOURISM

Economic and employment benefits of tourism

Tourism has become one of the biggest industries in the world. According to estimates prepared by the World Travel and Tourism Council, tourism directly and indirectly accounts for about 11.5% of jobs, more than 14% of investment, just under 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 of 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% a year over the next decade to \$34 billion (1996 dollars) in the year 2006 (Office of National Tourism 1997) as Figure 6.1 illustrates.

Figure 6.1 Tourism exports 1989-2006



Source: Office of National Tourism 1997

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 1990s and into the next century (Western Australian Tourism Commission 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 as they buy packages (airfares, accommodation, tours) in their country of origin. In 1995-96, total tourist expenditure in Western Australia 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). Communications with WATC indicate that for every additional \$1 million spent by tourists in Western Australia, 13 new jobs are created in the economy when compared to the previous year. In 1996, the tourism industry contributed to the direct employment of between 55 000 and 68 000 people, representing 6.6 to 8.1% of the State's total workforce.

The benefits of tourism expenditure accrue firstly to regional economies through tourist spending which has direct contributions to incomes for local communities. Additional state and national benefits occur through the multiplier effects. These include a diversification of Australia's industry structure, contributions to the balance of payments, and an increase in tax revenues and social benefits.

Another measure of tourism's contribution to the economy is through investment. The value of CALM recreation and tourism assets in the Swan, Central and Southern forest regions is estimated to be \$7.2 million, \$7 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 (C Ingram pers. comm.). The level of private investment in tourism projects which have been completed or are under construction in and around the Central and Southern forest regions in 1997 is estimated to be \$102.8 million (WATC 1997b). Tourism is estimated to contribute to the employment of between 4300 and 5300 people in these regions, excluding self-employed people, based on ABS statistics (G Hodgson pers. comm.).

Number of visitors to Western Australia

Tourism statistics are normally considered in three sectors, international, interstate and intrastate. For all sectors, a total of 6.4 million tourists were recorded in Western Australia in 1996. Of these, 4.2 million were classed as leisure visits. More than 80% of both leisure visitors and tourists were travelling within their own State, with approximately 8% from each of international and interstate locations.

Table 6.2 Visitor statistics for Western Australia, 1996

	International		Interstate		Intrastate		Total	
	Visits	Nights	Visits	Nights	Visits	Nights	Visits	Nights
Total tourists ,000s	529	10097	546		5333	18415	6408	
Leisure visitors ,000s	422		301		3444		4167	
<i>% of State total</i>								
Leisure visitors	10.1		7.2		82.6		100.0	
Total tourists	8.2		8.5		83.3		100.0	

Regional Forest Agreement areas

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

Tourist data

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

Table 6.3 Annual visitor numbers to the RFA area (1995 and 1996)

	Central and Southern forest regions		Northern Swan forest region		Total	
	Visitor nights (millions)	Visitor trips (millions)	Visitor nights (millions)	Visitor trips (millions)	Visitor nights (millions)	Visitor trips (millions)
<i>Origin</i>						
WA	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	8.511	2.379

Source: WATC Research Brief on Tourism

An assessment of activities indicates forests were a major attraction for visitors to the Central and Southern forest regions, with 18.3% of all visitors stating they had visited karri or jarrah forests. The forest was especially attractive to international and interstate visitors, of whom 45.5% and 43.2% visited forest areas, respectively. Visitation was much less in the northern Swan Forest Region, with fewer than 10% of all tourists stating they had visited karri or jarrah forests.

Total expenditure by tourists visiting a karri or jarrah forest in 1995 and 1996 has been estimated at \$250 million a year. Of this, 77% was associated with intrastate travellers, 13% with interstate and 10% international.

Day-trippers

Day-trippers made more than 3.9 million individual trips and 1.3 million group trips a year to the RFA region during 1995 and 1996. These day-trippers are estimated to have spent more than \$70 million a year.

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

Table 6.4 Annual day-trip visits and expenditure in RFA areas (1995 and 1996)

	Central and Southern forest regions	Swan Forest Region	Total
Group trips ,000s	818	525	1343
Visitor trips ,000s	1670	2262	3932
Expenditure ,000s	22169	48166	70335

Ninety eight per cent of day-trippers visiting the Swan Forest 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. More than 95% of all day-trippers travelled by car.

Major forest-based destinations were the Perth hills (23.8%), Serpentine/Jarrahdale area (10.8%) and Dwellingup (6.4%) in the Swan Forest Region, as well as the Southern Forest Region (11.1%) and Central Forest Region (10.8%).

6.5 EXPECTED GROWTH AND STRATEGIC DEVELOPMENT PLANNING

Expected growth in forest-based tourism

While there are no published growth estimates available for forest-based tourism and the general growth predictions that are available vary markedly (Table 6.5), it is necessary to scope the potential demand during the RFA period in order to estimate its impact on the study area.

Table 6.5 Growth predictions for tourism in Western Australia

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- 25 to 30% over the next decade for nature-based tourism world-wide (Western Australian Tourism Commission 1997)
 - 7.8% annual growth predicted for international tourism in Australia over the years 1996-2006 (Office of National Tourism 1997)
 - 20% per annum for ecotourism in Western Australia (Shea 1993)
-

Growth can be stimulated by marketing campaigns. The Western Australian Government has recently embarked on a “Brand” marketing campaign 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 Western Australia’s forest areas.

International tourists

Western Australia attracts between 12 and 13% of the international visitors who come to Australia (WATC 1997). Assuming this remains constant, then based on the Office of National Tourism’s estimate for long-term growth into Australia, the number of international visitors will increase by 7.8% per annum. Applied over the 20-year period of the RFA, the number of international visitors to karri and jarrah forests can be expected to increase from 37 500 in 1996 to 199 000 (approximately five times) by the end of the 20-year RFA period. The vast majority (more than 95%) of these tourists will be visitors to the south-west forests.

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% over the next decade. On this basis, numbers of interstate visitors will have increased from 66 500 in 1996 to 103 000 in 2018. Of these visits, about 90% will be to the Central and Southern forest regions.

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 an estimated 2% increase per year (Office of National Tourism 1997). This indicates that intrastate tourism will increase from 297 000 in 1996 to between 400 000 and 441 000 in 2018.

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 823 000 in 1996 to 1.1 million in 2018.

Overall growth estimate

Based on the above estimates, the overall number of visitors to the RFA area is predicted to increase from 1.2 million in 1996 to between 1.8 and 1.9 million in 2018. Based on current trends, 67% will visit the forests in the Central and Southern forest regions and only 33% those in the Swan Forest Region.

However, when compared to growth figures recorded by local tourist bureaux over the past six years, these estimates can be considered conservative and represent a baseline growth figure.

Over the period 1991-96, the increase in the number of visitors to tourist bureaux in the south-west, indicates an annual growth of around 10%.

Table 6.6 Visitor recorded numbers by south-west tourist bureaux

	1991	1996	Total increase over 6 yrs (%)
Margaret River	125 770	225 353	79.2 (13.2% per annum)
Pemberton	54 675	89 923	64.5 (10.8% per annum)
Nannup	15 221	21 900	43.9 (7.3% per annum)

Source:Local tourist bureaux statistics

Should this rate of growth continue throughout the RFA process, then the total number of tourists to the Central and Southern forest regions would approach three million by the year 2018 and 0.4 million in the Swan Forest Region. The expected increase in day-tripper numbers would be added to this figure.

These estimates, together with CALM's visitor statistics which show tourists visit an average three sites per trip, offer a range within which it may be reasonable to plan for tourism demand.

In order to service this projected increase in demand, planning will be required to determine how current facilities can be used more effectively and what developments may be required in regard to the introduction of major attractions and other new facilities, as well as planning for increased access for walking, rambling, mountain biking, horse riding and camping groups and supporting infrastructure in forest areas.

These data also clearly indicate that visitations by tourists staying one or more nights is far greater to the Central and Southern forests than to the Northern forests, while day-tripper visitations are similar in both areas. This suggests a potential to increase the appeal and hence the usage of the Northern forest to international and interstate visitors from or staying in the metropolitan or Peel region.

Development planning

A wide range of factors need to be considered when developing planning strategies for tourism development in the 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 complementary tourism attractions (vineyards, adventure experiences, restaurants, fishing, etc.) are required. These developments need to take into consideration the expected growth in tourism generally and in the specific market niches.

Any proposed tourism development aimed at meeting expected tourism growth should be ecologically sustainable. 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.

6.6 POTENTIAL AREAS OF CONFLICT

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.

