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Tourism and Recreation Study

Southern CRA Region

A project undertaken as part of the NSW Comprehensive Regional

Assessments

Draft Report November 1999

TOURISM AND RECREATION STUDY

SOUTHERN CRA REGION

Hassall & Associates

A project undertaken for
the Joint Commonwealth NSW Regional Forest Agreement Steering Committee
as part of the
NSW Comprehensive Regional Assessments
project number NS 16/ES

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PROJECT SUMMARY

This report describes a project undertaken as part of the comprehensive regional assessments of forests in New South Wales. The comprehensive regional assessments (CRAs) provide the scientific basis on which the State and Commonwealth Governments will sign regional forest agreements (RFAs) for major forest areas of New South Wales. These agreements will determine the future of these forests, providing a balance between conservation and ecologically sustainable use of forest resources.

Project objective/s

The objectives of this study were to provide profiling information on the nature and size of the forest based tourism and recreation industry in the Southern CRA region; collect and analyse baseline and trend information on the industry; assess the impact of a change in tenure from State forest to national park; and develop management options and operational indicators to maximise sustainable societal benefits.

Methods

The study required a review and update of the literature; the completion of interviews with nature based tourism/recreation operators and facility users; liaison with State Forests of NSW and the National Parks and Wildlife Service regarding activities permissible under the two alternate land tenures; and provision of sustainable land management options and indicators for consideration.

Key results and products

- State agencies manage 45 national parks and 82 State forests across the three sub-regions of the southern CRA region;
- an estimated 3.5 million visitors visited national parks and 500 000 visitors visited State forests in the region in 1998-99;
- the most popular activities undertaken in both parks and forests in the region include bushwalking, camping, picnicing, sightseeing, fishing and four-wheel driving. Within forests, other popular activities include horse riding and trail and mountain bike riding;
- the economic value of park and forest based tourism and recreation in the region was estimated using consumer surplus (\$20 to \$79 million) and expenditure based approaches (\$69 to \$113 million). Employment created, both directly and indirectly, was estimated to be between 1 380 and 2 415;
- a change in tenure from State forest to national park will provide opportunities for the nature based tourism and recreation industry (associated with change in tenure to national park) as well as potentially impacting upon specific forest based activities such as horse riding, four-wheel driving, bike riding and camping; and
- management options to increase the economic and social benefits attributable to sustainable forest based tourism and recreation relate to access, infrastructure development, information and interpretation, marketing and industry facilitation.

1. INTRODUCTION

1.1 PURPOSE OF THE STUDY

The purpose of this study was to provide quantitative and qualitative profiling data on tourism and recreation in the southern Comprehensive Regional Assessment (CRA) region. This profile incorporated both a supply (industry) and demand (user) perspective. Baseline information was gathered and trend information analysed and utilised to assess the impacts of potential changes in land tenure upon the profile of national park and state forest based tourism and recreation within the region.

In addition, management options for increasing the economic and social benefits attributable to sustainable forest based tourism and recreation opportunities were identified. Also, a series of operational indicators for monitoring the profile of forest based tourism and recreation in the region were developed for the Ecologically Sustainable Forest Management (ESFM) group. These indicators were developed consistent with Montreal Process Criteria.

This report was commissioned by Resource and Conservation Division (RACD), New South Wales Department of Urban Affairs and Planning (DUAP), to contribute to the CRA for the southern New South Wales region. Hassall & Associates completed this analysis for RACD in November 1999.

1.2 BACKGROUND TO THE CRA/RFA PROCESS

RACD has been established to review forestry issues in New South Wales and to provide advice to the State Government for the development of its forestry and conservation policies and reforms. A key activity of RACD is the co-ordination of CRAs of forested land, to facilitate the establishment of Regional Forest Agreements (RFAs).

The CRAs provide the scientific basis on which the State and Commonwealth Governments will sign RFAs for major forest areas of New South Wales. These agreements will determine the future of these forests, providing a balance between conservation and ecologically sustainable use of forest resources. The CRA process involves assessing the commercial values (such as timber, tourism, grazing, apiary) as well as the conservation values (such as species diversity) derived from State forests and evaluating the socio-economic and long term ecological impact of the alternative uses of these resources.

The southern CRA is the third region to be assessed in New South Wales: RFAs have been negotiated for Eden and the Upper and Lower North-East.

1.3 OBJECTIVES OF THE PROJECT

The objectives of the project are:

- to provide quantitative and qualitative profiling information on the nature and size of the forest based tourism and recreation industry and its users in the southern CRA region;
- to provide baseline and trend information on the tourism and recreation industry in the southern region;
- to utilise this profiling information in assessing the impact of changes in land tenure from State forests to national parks;
- to utilise the profiling and trend information to provide suggested management objectives for the region, with a focus on increasing the economic and social benefits attributable to sustainable forest based tourism and recreation opportunities, in accordance with Montreal Process Criteria for sustainable forest management and the Commonwealth/New South Wales Scoping Agreement for RFAs; and
- to assist in the development of operational indicators for monitoring for ESFM.

1.4 STUDY AREA

The southern CRA region encompasses 22 local government areas (LGAs). The region itself is divided into three sub-regions:

- coastal
- western tablelands
- northern tablelands

Table 1a lists the local government areas that are included as part of each sub-region.

TABLE 1A LOCAL GOVERNMENT AREAS WITHIN EACH SUB-REGION

Coastal	Sub-region	
	Western Tablelands	Northern Tablelands
Wingecarribee	Tumbarumba	Goulburn
Shellharbour	Gundagai	Gunning
Kiama	Holbrook	Crookwell
Eurobodalla	Tumut	Mulwaree
Bega Valley ¹	Yass	Yarrowlumla "A"
Cooma-Monaro	Snowy River	Oberon
Tallaganda		
Shoalhaven		
Yarrowlumla "B"		
Queanbeyan		

Note:

1. Bega Valley LGA is partially excluded from the analysis.

1.5 DEFINITIONS OF TOURISM AND RECREATION

For the purpose of this study, tourism is defined as including nature based activities undertaken within a region by visitors who have to travel in excess of 50 to 60 kilometres to reach the region. It is assumed that these visitors incorporate an overnight stay within the visited region into their trip. Recreation is defined as including activities undertaken by local residents within the region who undertake day trips in order to complete these nature based activities.

1.6 METHODOLOGY AND APPROACH

1.6.1 Methodology

Consistent with the project brief, the five key steps in the project methodology are outlined below:

- the review of existing literature and updating and expanding this information via the use of secondary data from other sources¹;
- the undertaking of interviews with practitioners in the industry, particularly those involved in nature based tourism and other relevant types of tourism and recreation, including Aboriginal/cultural tourism;
- the completion of surveys of users and potential users of forest based recreational and tourism services to gather information on the activities and opportunities being accessed/desired by these users;
- liaison with State Forests of NSW (SFNSW) and National Parks and Wildlife Service (NPWS) to define the range of tourism and recreation activities allowable under the two alternate management regimes; and
- the provision of sustainable land management options for consideration.

1.6.2 Adopted Approach

The study requirements were separated into three distinct, yet inter-related parts, they are:

- preparation of a forest tourism profile for the southern CRA region;
- impact assessment in relation to changes in land tenure; and
- preparation of management options and operational indicators for monitoring for the ESFM group.

Each of these parts is briefly detailed below.

¹ Other sources include the Australian Bureau of Statistics, Tourism NSW, Bureau of Tourism Research, Tourism Forecasting Council, regional tourism boards, local governments, chambers of commerce and information from regional Aboriginal Lands Councils.

1. Preparation of a Forest Tourism Profile for the Southern CRA Region

The preparation of a forest tourism profile involved a review of existing literature and an expansion of that literature based on secondary data sources. From the results of the literature review, data gaps were assessed. As part of this review of studies, existing survey data was incorporated into this study, where this data was deemed relevant and accessible.

Identified data gaps were overcome via the use of extensive surveying of both suppliers and users of forest based tourism and recreation. Surveys of industry suppliers were completed via a combination of mail, phone and fax techniques. Industry suppliers included SFNSW, NPWS and other commercial tourism and recreation operators whose businesses rely upon the use of state forests and national parks. Both commercial and non-commercial operators were targeted to ensure a reflective spread of service providers.

State agency staff from SFNSW and NPWS were contacted at both head office and district office level. Commercial tourism operators were surveyed using an industry operator survey specifically undertaken as part of this study. A wide geographical spread of providers was canvassed to reflect district level information across the three sub-regions.

A forest user profile was developed with the aid of the service providers (both commercial and non-commercial) as well as forest users and potential users. Forest users were surveyed to collect primary data. The sample included individuals that undertook activities in national parks and state forests as part of clubs and organisations as well as individuals that undertook activity on their own accord, either alone or with a group of colleagues/peers.

Where possible, profile data was prepared for critical indicators over a number of years so trends in the data could be recognised and reported². Economic values for tourism and recreation within the region were also reported. These values were estimated based upon profile data collected as part of this study as well as other relevant studies of economic value.

2. Impact Assessment in Relation to Changes in Land Tenure

For the final report, the following approach will be adopted to assess the impact of the negotiated outcome on the profile of national park and State forest based tourism and recreation in the southern region.

Based on information provided by State agencies, those activities that are permissible under each form of land tenure were established. The specific nature of the negotiated outcome was then examined to determine the extent of impact of tenure change upon activities undertaken within each sub-region of the study area.

The economic and social impacts associated with the implementation of the negotiated outcome were estimated using both qualitative and quantitative means. Estimated impacts accounted for:

- changes in the profile of visitors attracted to the area resulting in a change in needs, expectations and spending patterns;
- opportunities, both economic and social, that would be created as a result of the negotiated outcome. Opportunities may include an increase in visitors attracted by the 'status' of a national park or by the opportunities provided therein; and
- the possible adverse impacts associated with tenure change, including the potential displacement of current visitor groups currently attracted to State forests.

² Data limitations across a number of profile indicators limited the extent to which quantitative trend information could be provided.

3. Preparation of Management Options & Operational Indicators

Management options were developed based on the regional park and forest based tourism and recreation profile and the likely impacts of the negotiated outcome on this profile. The aim of suggested management options was to:

- maximise environmentally sustainable economic and social benefits; and
- mitigate any adverse economic and social impacts associated with the implementation of the negotiated outcome.

Management options were developed recognising the potential impacts of tenure change on activities and visitation. Management options were suggested in relation to access, infrastructure development, information and interpretation, marketing and industry facilitation. Factors that influence the selection of appropriate management options in the southern region were also outlined.

Information was also provided to assist the Ecologically Sustainable Forest Management (ESFM) group in the development of operational indicators for monitoring sustainable forest based tourism and recreation opportunities. The purpose and characteristics of performance indicators were explored and an overview of the Montreal Process Criteria was provided.

Indicators developed under the regional framework by the Montreal Process Implementation Group were reviewed to gauge their relevance and coverage relative to the southern CRA region. Additional indicators that would improve ongoing monitoring were also suggested. Data sources derived during the completion of the study that would be a valuable starting point in discussions about ongoing data collection methodologies were also listed.

1.7 DATA

Numerous data sources were used in order to develop the profile of tourism and recreation within the southern region. Relevant organisations and agencies which supplied data that was either directly or indirectly incorporated into the analysis included:

- Australian Bureau of Statistics
- Bureau of Tourism Research
- Commercial tourism and recreation industry operators (various sources)
- National Parks and Wildlife Service
- Resource and Conservation Division
- State Forests of NSW
- Tourism Forecasting Council
- Tourism NSW

In addition, results of the commercial industry operator survey and State forest user survey were extensively used in developing the profile of tourism and recreation in the study region.

An extensive listing of references (both primary and secondary data sources) that were used as part of this study is included within section twelve of this report.

2. OVERVIEW OF TOURISM IN AUSTRALIA

2.1 INTRODUCTION

Section two provides an overview of tourism within Australia. The purpose of this section is to develop a perspective of the scale of the tourism industry within Australia, and the relative importance of various components of this industry.

A profile is developed for international and domestic visitation within Australia, New South Wales and the southern CRA region. A discussion of the recreation component of tourism and recreation is introduced in section three of this report.

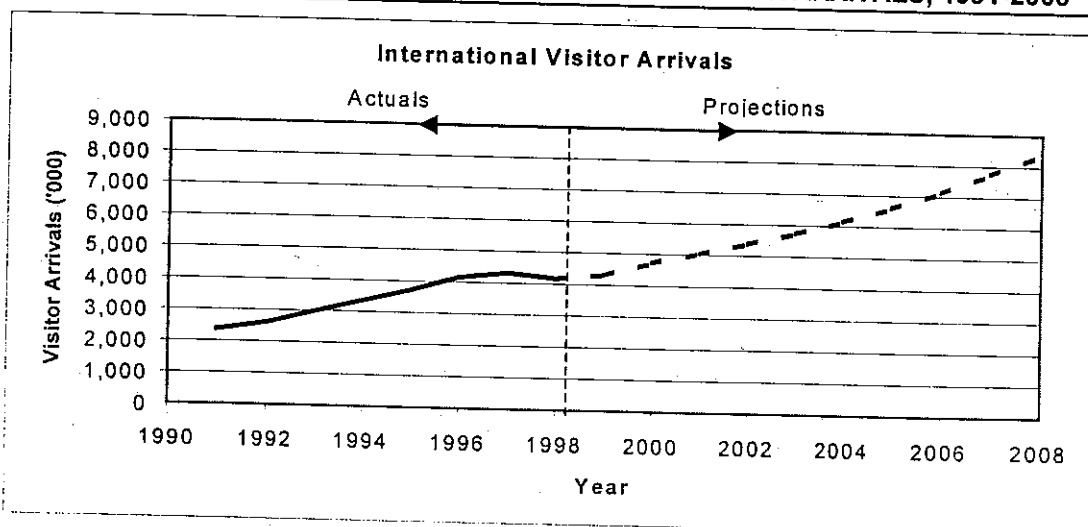
2.2 INTERNATIONAL VISITATION

2.2.1 International Visitation to Australia

In 1998 there were 4.2 million international visitor arrivals into Australia. This represented a decline of 3.5% from 1997, due to fewer visitor arrivals from Asia. However, forecast arrivals are anticipated to increase by 3.8% to 4.3 million in 1999 and to increase a further 9.5% to 4.7 million in 2000. International visitor arrivals are forecast to grow at an average annual rate of 7.3%, from 4.2 million in 1998 to 8.4 million in 2008 (Tourism Forecasting Council, 1999).

Figure 2a illustrates the trend in the number of short-term international visitor arrivals from 1991 to 2008.

FIGURE 2A SHORT-TERM INTERNATIONAL VISITOR ARRIVALS, 1991-2008



Source: Australian Bureau of Statistics Cat No. 3401.0 (1991-1998) and Tourism Forecasting Council (1999-2008)

On average, international visitors stayed 23 nights in Australia in 1997. Average expenditure whilst in Australia in 1997 was estimated to be \$1 953 (Bureau of Tourism Research, 1999a). In 1998, average expenditure was \$2 165 (Tourism NSW, 1999). This equates to an average expenditure per night of \$84 in 1997 and \$94 in 1998³. Visitor expenditure in Australia by item for 1996 and 1997 is listed in table 2a.

TABLE 2A SHARE OF VISITOR EXPENDITURE IN AUSTRALIA BY ITEM (%), 1996-97

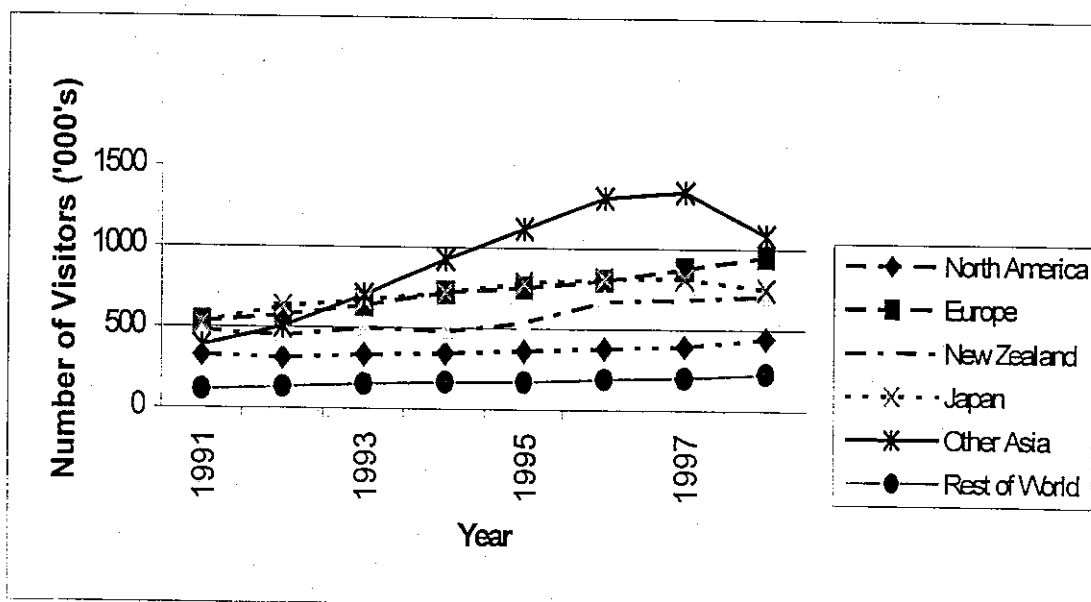
Expenditure Item	1997	1996
Food, Drink & Accommodation	34	34
Shopping	24	29
Transport	10	7
Education Fees	10	7
Entertainment	6	na
Organised Tours	5	4
Capital Goods	5	4
Other Expenditure	6	15
Total	100%	100%

Source: Bureau of Tourism Research (1999)

Fifty-eight percent of international visitors cited a holiday as the main reason for visiting Australia. The next most common reason for visiting Australia was visiting friends and relatives (19%) (Bureau of Tourism Research, 1999a).

Figure 2b shows the trend in country of residence for international visitors to Australia since 1991.

FIGURE 2B COUNTRY OF RESIDENCE, INTERNATIONAL VISITOR ARRIVALS, 1991-1998



Source: Australian Bureau of Statistics Cat No. 3401.0

³ Excludes expenditure on fully inclusive, pre-paid package tours and international airfares purchased outside Australia. Per night expenditure in 1998 assumes an average duration of 23 visitor nights (that is, based on 1997 visitor night data).

Trends in the country of residence of international visitor arrivals over the last decade reveal that 'other Asia' has emerged as the most important market for Australian tourism. The most important countries within this segment are Singapore, Taiwan, Hong Kong, Malaysia and China. European, Japanese and New Zealand visitors are also important markets for international visitation. Recently, the market share attributed to Japanese and other Asian visitors has declined due to the Asian economic downturn. Forecasts provided by the Tourism Forecasting Council (1999) indicate that positive growth will return to the other Asia market in 1999 and to Japan in 2000.

2.2.2 International Visitation Within Australia

New South Wales is the most important tourism market for international visitors within Australia. Table 2b lists the state market share by state and territory for international visitor nights in 1996 and 1997.

TABLE 2B STATE MARKET SHARE OF INTERNATIONAL VISITOR NIGHTS, 1996-97

State/Territory	1996	1997
New South Wales	39	35
Victoria	17	20
Queensland	22	23
South Australia	4	4
Western Australia	11	11
Tasmania	1	2
Northern Territory	3	3
Australian Capital Territory	2	2
Total	100	100

Source: Bureau of Tourism Research (1999b)

As can be seen from table 2b, state market share of international visitor nights over 1996-97 remained relatively constant, with the only major change being an increase in international visitor nights being spent in Victoria at the expense of New South Wales. New South Wales market share remains, however, the largest and is expected to increase in the lead-up to, and immediately following, the Sydney 2000 Olympic Games. The Tourism Forecasting Council (1999) estimates that total international visitor nights spent in Australia will grow by an average annual rate of 7.2%, from around 95 million in 1998 to 190 million in 2008.

A useful indicator of domestic share of international visitation is to analyse the most popular regions visited by international tourists. The top 20 domestic regions visited by international visitors in 1996 and 1997 are shown in table 2c. This data shows the high level of preference by international visitors for major tourism destinations. Sydney is easily the most visited region (reflecting the fact that the city is the major gateway into Australia for international air travel), with the other state capitals and regional parts of Queensland and the Northern Territory also important regions for international visitation. As far as the current study area is concerned, only the Blue Mountains region ranks within the top 20 Australian destinations⁴.

⁴ Part of the Blue Mountains region falls within the northern tablelands sub-region of the southern CRA region. Canberra is excluded from this analysis, as the ACT is not incorporated within the southern CRA region.

TABLE 2C TOP 20 REGIONS VISITED IN AUSTRALIA, 1996-97

Region Visited	1997			1996		
	Rank	Visitors ('000)	%	Rank	Visitors ('000)	%
Sydney, NSW	1	2 315.6	58.7	1	2 316.0	60.8
Gold Coast, QLD	2	994.5	25.2	2	976.6	25.6
Melbourne, VIC	3	951.4	24.1	3	900.3	23.6
Far North, QLD	4	731.2	18.5	5	690.0	18.1
Brisbane, QLD	5	687.6	17.4	4	736.3	19.3
Perth, WA	6	467.8	11.9	6	470.4	12.3
Adelaide, SA	7	254.3	6.4	8	261.0	6.9
Petermann, NT	8	234.2	5.9	7	261.8	6.9
Canberra, ACT	9	197.0	5.0	9	220.3	5.8
Alice Springs, NT	10	194.7	4.9	10	219.1	5.8
Whitsunday Islands, QLD	11	175.9	4.5	19	87.0	2.3
Darwin, NT	12	154.6	3.9	12	149.1	3.9
Sunshine Coast, QLD	13	143.1	3.6	11	150.8	4.0
Upper North Coast, NSW	14	142.2	3.6	15	119.4	3.0
Gympie/Maryborough, QLD	15	139.3	3.5	13	123.7	3.2
Northern, QLD	16	117.4	3.0	14	122.5	3.2
Great Ocean Road, VIC	17	105.1	2.7	17	88.6	2.3
Fitzroy, QLD	18	101.2	2.6	16	89.7	2.4
Blue Mountains, NSW	19	87.0	2.2	-	-	-
Hunter, NSW	20	85.3	2.2	-	-	-

Source: Bureau of Tourism Research (1999b)

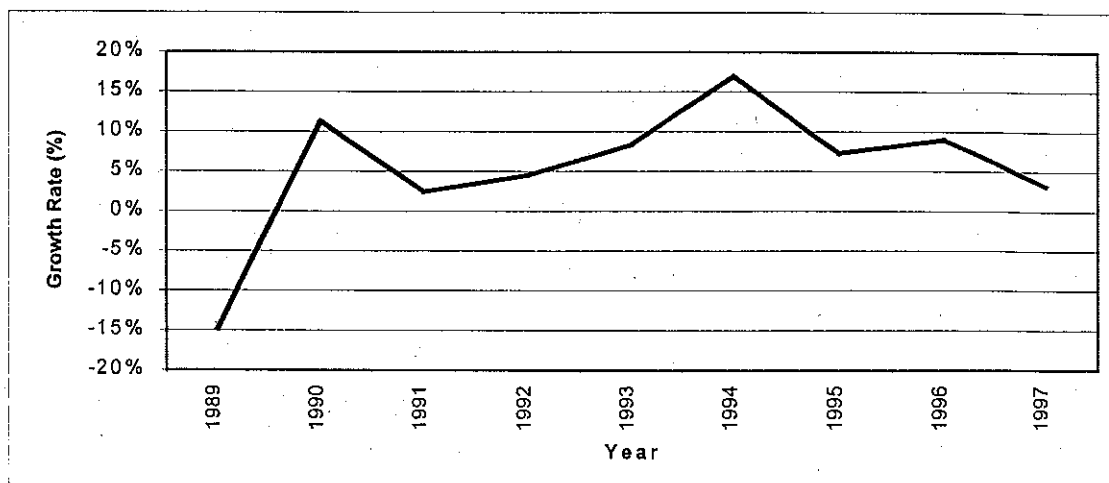
Note:

1. Total excludes visitors who did not specify regions visited and day trippers.
2. Prior to 1996, the Whitsunday Islands Region included Great Keppel island and Heron island. From 1996, Great Keppel Island and Heron Island have been included within the Great Barrier Reef – South Region.
3. The totals of the columns add to more than the total number of visitors as visitors tend to travel to more than one region.

2.2.3 International Visitation within New South Wales

Between 1988 and 1997, international visitation to regions within New South Wales increased by 55% from 2.1 million to 3.3 million. However, there was a fair degree of variability in the annual growth rate for total visitation. Figure 2c illustrates this variation in annual visitation growth rate.

FIGURE 2C ANNUAL AVERAGE GROWTH IN INTERNATIONAL VISITATION TO NEW SOUTH WALES, 1988-1997



Source: Tourism NSW (various years) – based on ABS and IVS data

As can be seen, positive growth in international visitation to New South Wales has been maintained since 1990. The rate of growth achieved within New South Wales peaked in 1994 and has declined since. The decline in the rate of growth in 1997 reflects the decline in market share achieved by New South Wales in total visitation to Australia, as discussed in Table 2b.

Within New South Wales, international visitation is highly concentrated in non-regional areas. This has been the case for some time and little evidence exists to suggest it will change in a substantive manner. Over the period 1988 to 1997, the Sydney region accounted for between 73% and 78% of total international visitation within regions of New South Wales.

Excising the visitation associated with the Sydney region allows conclusions to be drawn as to the intensity of visitation to other regions within New South Wales. Appendix 2a lists visitation data by tourism region for each year from 1988 to 1997⁵.

Analysis of the data provided in appendix 2a reveals:

- between 1988 and 1997, international visitation to regions within New South Wales, (excluding Sydney), increased by 53% from 524 000 to 801 000;
- the most popular regions visited by international visitors are the Upper, Lower and Mid North Coast, Blue Mountains/Hawkesbury⁶ and the Hunter region;
- there has been a steady increase in market share for the Upper North Coast and to a lesser extent the Blue Mountains/Hawkesbury region;
- the Illawarra exhibited a decline in market share to 1992, but has since seen increasing market share; and
- most other regions have maintained a relatively static market share, or have been subject to a slight decline.

2.2.4 International Visitation Within the Southern CRA Region

Using the data provided within appendix 2a, a profile of international visitation within the southern CRA region can be developed. New South Wales tourism regions that are included, either wholly or partly, within the southern CRA region include:

- South Coast
- Illawarra
- Blue Mountains/Hawkesbury
- Snowy Mountains
- Southern Tablelands
- Murray
- Riverina
- Central West

⁵ Market share does not incorporate visitation to the Sydney region.

⁶ Prior to 1989-90, the Blue Mountains/Hawkesbury region was combined with the Central Coast region and referred to as Outer Sydney.

To account for the fact that some parts of these tourism regions fall outside the southern CRA region, the estimates of visitation to each region must be adjusted to reflect only that visitation that actually occurs within the southern CRA region. Table 2d lists the estimated proportion of total visitation within each region that occurs in the study region.

TABLE 2D PROPORTION OF TOURISM REGION VISITATION WITHIN THE SOUTHERN CRA REGION

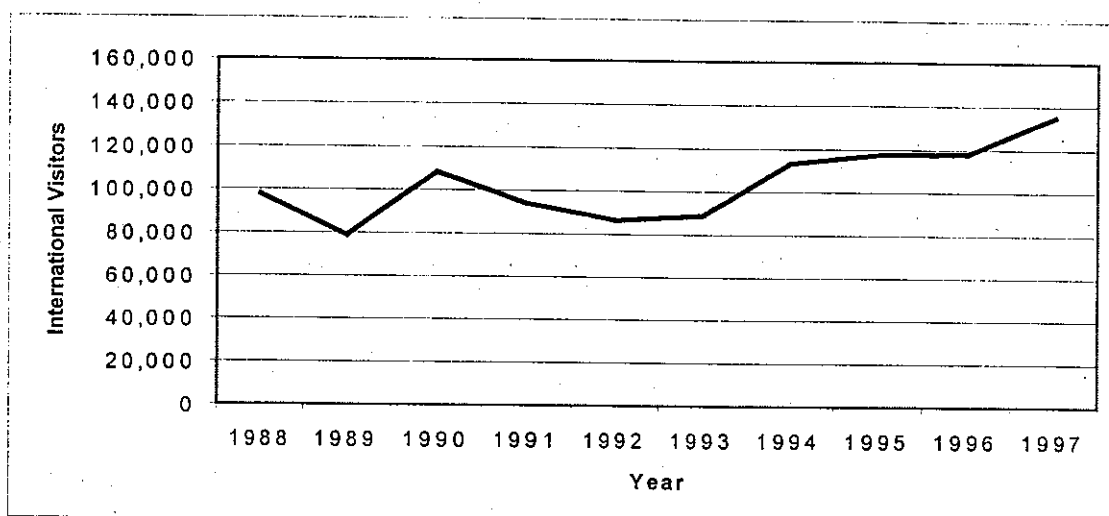
Region	Proportion of total international visitation in each tourism region that is undertaken in the study region
South Coast	75%
Illawarra	75%
Blue Mountains/Hawkesbury	25%
Snowy Mountains	90%
Southern Tablelands	75%
Murray	10%
Riverina	10%
Central West	15%

Using the proportions listed above, annual international visitation within the study region can be estimated. Appendix 2b provides estimated visitation within the study area by tourism region for 1988 to 1997.

Analysis of the data provided in appendix 2b reveals:

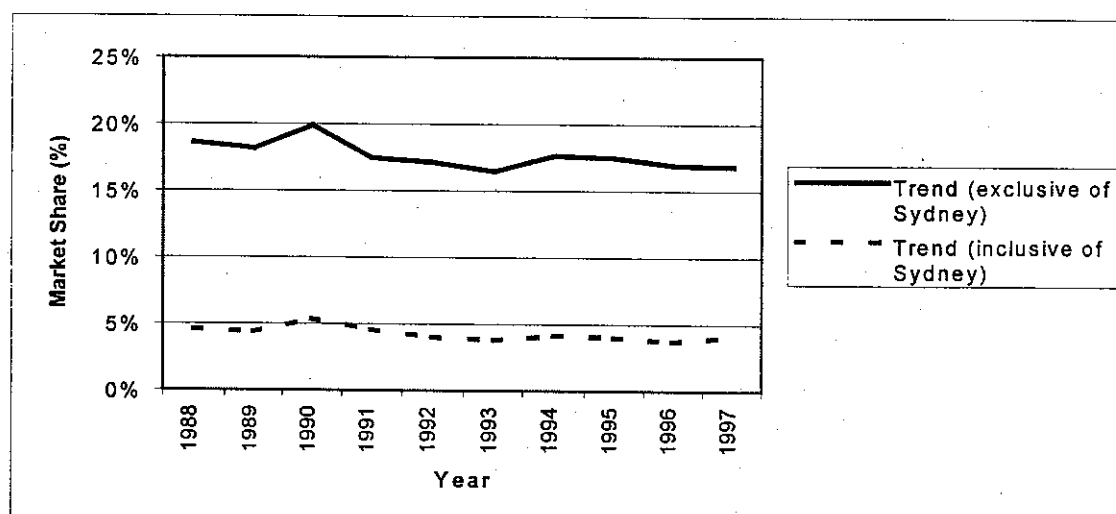
- the most popular regions within the southern CRA region for international visitation are the Illawarra, Blue Mountains/Hawkesbury and the South Coast region;
- estimated international visitation within the study region increased by 38% between 1988 and 1997, from 98 000 to 135 000;
- this is less than the state average (excluding Sydney) growth in international visitation of this period which was 53%; and
- however, since 1992, the rate of growth in international visitation in the southern CRA region has more closely matched the state average (excluding Sydney) growth rate (56% relative to 59%).

A trend analysis of annual international visitation within the southern CRA region reveals the region has enjoyed growth in international visitation over recent years. This contrasts with the early 1990s, which saw a decline in international visitation within the region. Figure 2d graphically represents the trend in international visitation from 1988 to 1997.

FIGURE 2D TRENDS IN INTERNATIONAL VISITATION TO THE SOUTHERN CRA REGION

Source: Estimates adapted from data supplied by Tourism NSW

Figure 2e illustrates the trend in southern CRA region market share of total international visitation to New South Wales regions. Trend lines are provided relative to total visitation inclusive and exclusive of visitation to the Sydney region.

FIGURE 2E SOUTHERN CRA REGION MARKET SHARE OF INTERNATIONAL VISITATION TRENDS

Source: Tourism NSW

As can be seen, when measured relative to total New South Wales visitation, inclusive of Sydney, market share has remained relatively constant since 1991. Greater variation has been exhibited in market share when visitation to the Sydney region is excluded from the analysis and non-metropolitan market share is examined. This reflects the low (and sometime negative) annual visitation growth rates in the study area in the early 1990s. This also reflects the fact that state-wide growth in visitation has been exceeding the growth rate achieved in the study area over this period of time.

2.3 DOMESTIC VISITATION

2.3.1 Introduction

From 1998, the National Visitor Survey became the major source of information on the characteristics and travel patterns of domestic tourists. Prior to this, the Domestic Tourism Monitor was used to collect and collate domestic tourism profile information. Because of differences between the two survey methodologies and the questions themselves, results from the National Visitor Survey cannot be compared with those from its predecessor, the Domestic Tourism Monitor (DTM). Further, differences between the results from the two surveys cannot be validly interpreted as changes in the level of tourism activity or travel behaviour of Australians (Bureau of Tourism Research, 1999c).

Therefore, by examining data from the 1998 National Visitor Survey, a profile of domestic tourism can be developed for 1998. To gauge an understanding of trends in major tourism indicators, results from the Domestic Tourism Monitor are examined.

2.3.2 Domestic Visitation Within Australia

Results from the National Visitor Survey - Overnight Trips⁷

In 1998, 73.8 million overnight trips were undertaken in Australia by Australians aged 15 years and over. This resulted in 293.5 million visitor nights being spent away from home⁸. Expenditure associated with this domestic travel within Australia was estimated to be \$32.8 billion in 1998. This is equivalent to \$444 per overnight trip and \$112 per visitor night (Bureau of Tourism Research, 1999c).

Table 2e shows the breakdown between interstate and intrastate trips for overnight trips, visitor nights and expenditure for Australia.

TABLE 2E OVERNIGHT TRIPS, NIGHTS AND EXPENDITURE IN AUSTRALIA, 1998

Type of trip	Overnight Trips (millions)	Nights (millions)	Expenditure (\$billions)
Interstate trips	20.7	129.8	18.4
Intrastate trips	53.1	163.7	14.4
Total trips	73.8	293.5	32.8

Source: Bureau of Tourism Research (1999c)

The main destinations for overnight trips were New South Wales (35%), Victoria (24%) and Queensland (20%). The main purpose for undertaking overnight trips were holiday/leisure (44%), visiting friends and relatives (33%) and business (19%) (Bureau of Tourism Research, 1999c).

⁷ Overnight trips are defined as trips involving a stay away from home for at least one night, at a place at least 40 kilometres from home. Only trips with a duration of less than 12 months are included (Bureau of Tourism Research, 1999c).

⁸ Based on an average trip duration of 4 nights.

Results from the National Visitor Survey - Day Trips⁹

In 1998, 153.1 million day trips were undertaken by Australians aged 15 years and over. The purpose of these day trips was predominantly leisure (52%), with 30% undertaken for the purpose of visiting friends and relatives. Day trips resulted in over \$10.2 billion in expenditure; an average day trip expenditure of \$67 (Bureau of Tourism Research, 1999c).

Results from the Domestic Tourism Monitor

Utilising data from the Domestic Tourism Monitor allows us to build a time series of domestic travel. Table 2f shows the number of domestic visits and visitor nights by Australians within Australia from 1984-85 to 1996-97.

TABLE 2F DOMESTIC VISITS AND VISITOR NIGHTS BY AUSTRALIANS, 1984/85 – 1996/97

Year	Visits (millions)	Visitor Nights (millions)
1984-85	53.9	200.9
1985-86	54.0	208.9
1986-87	53.4	210.9
1987-88	55.6	216.9
1988-89	54.8	214.0
1989-90	58.4	223.8
1990-91	56.7	215.4
1991-92	57.9	216.3
1992-93	57.6	210.4
1993-94	58.7	211.4
1994-95	71.9	246.3
1995-96	76.0	256.5
1996-97	75.0	251.0

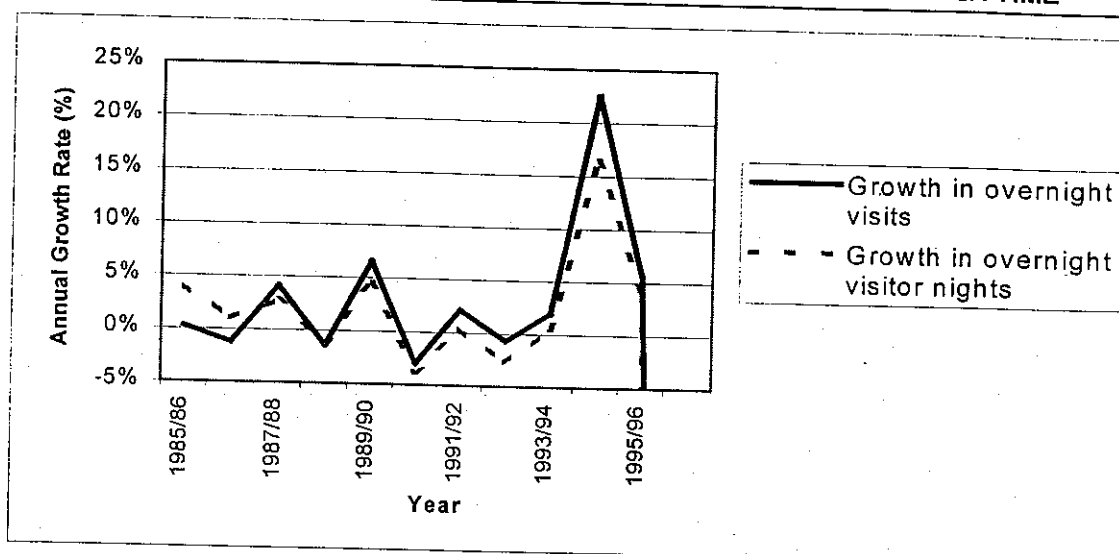
Source: Bureau of Tourism Research, Domestic Tourism Monitor (various years)

Between 1984-85 and 1996-97, domestic visits within Australia increased by 39% from 53.9 million to 75 million and the number of domestic visitor nights spent in Australia increased by 25% from 200.9 million to 251.0 million. Figure 2f provides a summary of the trends reported in table 2e by plotting annual growth in visits and visitor nights between 1984-85 and 1996-97.

Divergences in annual growth in domestic visits and visitor nights are largely consistent. The annual growth rate of both indicators was sporadic throughout the 1980s and the early 1990s before growth peaked in the mid-1990s. It has since declined, although conclusions about 1998 trends cannot be made given the change that has occurred from the Domestic Tourism Monitor to the National Visitor Survey.

⁹ Day trips are those trips that do not involve an overnight stay. They involve travel for a round trip distance of at least 50 kilometres and a duration of at least 4 hours. Day trips as part of overnight trips are excluded, as are routine trips such as commuting between work/school and home (Bureau of Tourism Research, 1999c).

FIGURE 2F GROWTH IN OVERNIGHT VISITS AND VISITOR NIGHTS OVER TIME



Source: Bureau of Tourism Research, Domestic Tourism Monitor (various years)

2.3.3 Domestic Visitation Within New South Wales

Results from the National Visitor Survey - Overnight Trips

In 1998, 25.6 million overnight trips were undertaken in New South Wales. This resulted in 92.2 million visitor nights being spent in New South Wales. Expenditure associated with this domestic travel within New South Wales was estimated to be \$9.2 billion in 1998¹⁰. This equates to an average expenditure of \$100 per visitor night within New South Wales (Bureau of Tourism Research, 1999c).

Table 2g shows the breakdown of overnight trips, visitor nights and expenditure for New South Wales between interstate and intrastate trips for 1998.

TABLE 2G OVERNIGHT TRIPS, NIGHTS AND EXPENDITURE IN NEW SOUTH WALES, 1998

Type of trip	Overnight Trips (millions)	Nights (millions)	Expenditure (\$billions)
Interstate trips	7.3	35.0	4.2
Intrastate trips	18.3	57.2	5.0
Total trips	25.6	92.2	9.2

Source: Bureau of Tourism Research (1999c)

Note: This data has been collected for New South Wales based on the main purpose of destination for domestic travel within Australia.

New South Wales accounted for 35% of national overnight trips, 31% of visitor nights and 28% of expenditure associated with overnight trips. The main purpose of overnight trips undertaken within New South Wales was holiday/leisure (43%), visiting friends and relatives (35%) and business (19%).

¹⁰ This data has been collected for New South Wales based on the main purpose of destination for domestic travel within Australia.

Results from the National Visitor Survey - Day Trips

In excess of 52 million day trips were undertaken within New South Wales in 1998¹¹. This represents 34% of day trips undertaken within Australia. Total expenditure associated with day trips undertaken in New South Wales in 1998 was equivalent to \$3.5 billion. This represents 35% of day trip expenditure within Australia and is equivalent to an average day trip expenditure of \$67 (Bureau of Tourism Research, 1999c).

Results from the Domestic Tourism Monitor

Domestic visits and visitor nights spent in New South Wales grew steadily between 1984-85 and 1996-97. By 1996-97, total domestic visits to New South Wales totalled 25.4 million. This represented the largest proportion of Australian domestic tourism, both in terms of visits and visitor nights.

Table 2h shows annual data for visits and visitor nights spent in New South Wales between 1984-85 and 1996-97.

TABLE 2H DOMESTIC VISITS AND NIGHTS IN NEW SOUTH WALES, 1984/85 – 1996/97

Year	Visits (millions)	Visitor Nights (millions)
1984-85	18.6	66.7
1985-86	19.5	70.2
1986-87	18.8	70.5
1987-88	19.2	72.3
1988-89	18.5	67.1
1989-90	18.8	68.7
1990-91	18.0	65.8
1991-92	18.3	64.3
1992-93	18.4	64.6
1993-94	18.6	64.0
1994-95	23.5	77.2
1995-96	24.9	80.1
1996-97	25.4	81.0

Source: Bureau of Tourism Research, Domestic Tourism Monitor (various years)

Between 1984-85 and 1996-97, domestic visits in New South Wales increased by 37% and domestic visitor nights increased by 21%. Trips were generally undertaken to coincide with the major school holiday months, those being January, October, April, March and July. Eighty percent of visitors used a private car as the main mode of transport during their visit. Accommodation with friends and relatives was the most popular form of accommodation (44%) (Tourism NSW, 1998).

Appendix 2c provides a summary of domestic visits within New South Wales regions over the period of time 1987-88 to 1996-97. Analysis of this data shows that:

- Sydney has accounted for between 21% and 25% of total visits over this time period;
- other non-metropolitan regions that are significant regions for domestic tourism in New South Wales include the Hunter, Illawarra and Central Coast; and
- the least important regions in terms of domestic visits are the Far West, Snowy Mountains and Southern Tablelands.

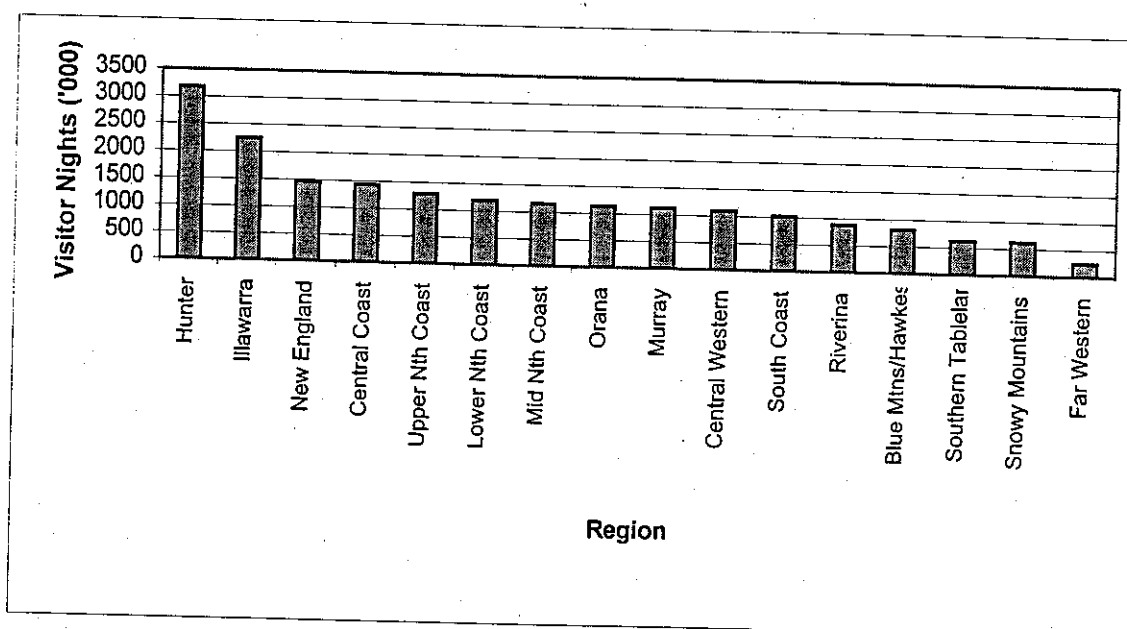
¹¹ New South Wales being the main destination of the trip.

Appendix 2d provides a summary of domestic visitor nights within New South Wales regions over this time. This data series reveals:

- Sydney has accounted for between 23% and 26% of domestic visitor nights in New South Wales over this time period;
- the most popular regions in terms of visitor nights are the Hunter, Illawarra and Upper and Lower North Coast; and
- the least popular regions are the Far West, Southern Tablelands and Blue Mountains/Hawkesbury region.

A snapshot of domestic visitor nights spent in New South Wales non-metropolitan regions in 1996-97 is presented in figure 2g.

FIGURE 2G DOMESTIC VISITOR NIGHTS IN NEW SOUTH WALES NON-METROPOLITAN REGIONS, 1996-97



Source: Tourism NSW (1998)

From figure 2g it can be seen that, generally, coastal regions and those regions within close proximity to the Sydney metropolitan area have the greatest number of visitor nights per annum. The Illawarra is the only southern CRA region within the top ten regions in New South Wales (including Sydney). An overview of domestic tourism in the southern CRA region is provided below.

2.3.4 Domestic Visitation Within the Southern CRA Region

Tourism NSW compiles data on LGA tourism activity by combining data from a number of sources (combining international and domestic visitation). As explained in section one of this report, there are 22 local government areas (LGAs) that make up the southern CRA region. These LGAs are spread across the three sub-regions that constitute the southern CRA region.

Table 2i lists trend data for visits, visitation and expenditure within the local government areas of the southern CRA region over the period 1987-88 to 1996-97.

TABLE 2I VISITS, VISITOR NIGHTS AND EXPENDITURE IN THE SOUTHERN CRA LOCAL GOVERNMENT AREAS, 1987/88 – 1996/97

Year	Visits ('000)	Visitor Nights ('000)	Expenditure (\$ millions)
1987-88	3 727	13 224	773
1988-89	3 722	13 035	819
1989-90	3 974	14 013	895
1990-91	3 659	13 428	955
1991-92	3 321	12 097	882
1992-93	4 760	14 710	886
1993-94	4 783	22 803	902
1994-95	5 719	17 513	1 112
1995-96	5 832	17 739	1 175
1996-97	5 849	17 217	1 157

Source: Tourism NSW estimates of visits, visitor nights and expenditure in NSW LGAs (various years)

Data for 1994-95, 1995-96 and 1996-97 can be directly compared. However, these three years are not directly comparable with data for previous years. An examination of data over the last three years reveals that visits to the region have been increasing steadily, although visitor nights and expenditure declined in 1996-97.

An examination of southern region market share in total New South Wales LGA tourism reveals variation in the importance of the region within total domestic tourism in New South Wales. Table 2j lists visits, visitor nights and expenditure data for all LGAs in New South Wales over the period 1992-93 to 1996-97.

TABLE 2J VISITS, VISITOR NIGHTS AND EXPENDITURE IN NEW SOUTH WALES LOCAL GOVERNMENT AREAS, 1992/93 – 1996/97

Year	Visits ('000)	Visitor Nights ('000)	Expenditure (\$ millions)
1992-93	31 984	106 484	6 703
1993-94	32 546	109 475	7 000
1994-95	36 420	121 905	8 090
1995-96	38 436	125 556	8 763
1996-97	39 002	132 669	na

Source: Tourism NSW estimates of visits, visitor nights and expenditure in NSW LGAs (various years)

By comparing statewide and southern region data from 1994-95 to 1996-97, it is noted that:

- the local government areas in the southern region accounted for 16% of total New South Wales LGA visits in 1994-95 and 17% in 1996-97;

- the southern region accounted for 14% of visitor nights in 1994-95 and 13% in 1996-97; and
- the proportion of total expenditure within the southern region declined from 14% to 13% between 1994-95 and 1995-96.

Table 2k provides a snapshot of visits, visitor nights and visitor expenditure derived within each LGA in the study region in 1996-97.

TABLE 2K VISITS, VISITOR NIGHTS AND EXPENDITURE IN THE SOUTHERN REGION, 1996-97

LGA	Visits ('000)	Visitor Nights ('000)	Expenditure (\$Million)
South Coast Sub-region			
Wingecarribee	421	1168	83
Shellharbour	274	1020	72
Kiama	360	990	66
Eurobodalla	800	2624	171
Bega Valley ¹	761	2649	172
Cooma-Monaro	227	670	46
Tallaganda	25	62	4
Shoalhaven	1293	3807	248
Yarrowlumia	83	203	14
Queanbeyan	233	489	35
Tumut Sub-region			
Tumbarumba	54	128	9
Gundagai ¹	73	149	11
Holbrook	62	114	8
Tumut	103	331	23
Yass	185	330	22
Snowy River	498	1616	112
Northern Sub-region			
Goulburn	228	410	29
Gunning	20	59	4
Crookwell	57	149	10
Mulwaree	30	83	6
Oberon	62	166	12
Southern CRA	5,849	17,217	1,157
Total NSW	39,002	132,669	8,763(2)

Source: Tourism NSW, estimates of visits, visitor nights and expenditure in NSW LGAs, 1996-97

1. Bega Valley and Gundagai LGA's are partially included within the Southern CRA.

2. Total expenditure for NSW relates to 1995-96.

Table 2k shows that the profile of tourism in the southern CRA region in 1996-97 consisted of:

- 5.9 million visits;
- 17.2 million visitor nights; and
- \$1.2 billion in expenditure.

Much of the tourism visits and expenditure within the southern CRA region would accrue directly as a result of attractions such as beaches and the snow. Beaches are generally not site-specific attributes that generate either State forest or national park based tourism¹².

In terms of the relative size of tourism in each sub-region, table 2l summarises the LGA data from table 2k.

TABLE 2L SOUTHERN CRA REGION VISITS, VISITOR NIGHTS AND EXPENDITURE BY SUB-REGION

Sub-region	Visits ('000)	Visitor Nights ('000)	Expenditure (\$Million)
Coastal	4,477	13,682	911
Western Tablelands	975	2,668	185
Northern Tablelands	397	867	61
Total	5,849	17,217	1,157

Source: estimated based on data from Tourism NSW

Table 2l shows that the coastal sub-region is the most important sub-region for tourism within the southern CRA. The northern tablelands sub-region has the smallest tourism industry, when measured by visits, visitor nights and expenditure.

2.4 SUMMARY & DISCUSSION

This overview of tourism reveals several key points relevant to the development of a profile of tourism and recreation within the southern CRA region:

- the tourism industry in New South Wales is a very important industry;
- continual growth in this industry is forecast for the next ten years;
- however, the Illawarra region is the only region included within the southern CRA that is a significant tourism region when these regions are compared with other NSW tourism regions;
- despite this, tourism and recreation are an important component of economic activity for the regions included within the southern CRA; and
- of the three sub-regions that make up the area included within the southern CRA, the coastal sub-region is the most important, when measured in terms of visits, visitor nights and visitor expenditure.

¹² That is, there are other opportunities for undertaking beach visits outside of national park and State forest areas.

3. TOURISM AND RECREATION IN NATIONAL PARKS AND STATE FORESTS

3.1 INTRODUCTION

The following section provides an overview of tourism and recreation in national parks and State forests within Australia. The purpose of this section is to review literature that is related to tourism and recreational use of national parks and State forests. From this literature review, an understanding of the general, Australia-wide profile of visitation to parks and forests can be gained. It is important to develop this general profile before a specific profile of tourism and recreation is developed for parks and forests in the southern CRA region.

The general profile of visitation to parks and forests in this section places particular emphasis on describing the types of visitors to these areas, the activities they undertake and the attributes they seek. A brief overview of ecotourism is also provided. Recent studies that have examined the issue of nature based tourism and recreation are reviewed and relevant findings discussed in detail¹³.

3.2 NATIONAL PARKS

3.2.1 Types of Visitors to National Parks

There is an extensive body of literature that has focussed upon segmenting the market for nature based tourism. Lindberg (1994), Simpson (1997) and Yann, Campbell, Hoare and Wheeler (1996) all segmented visitors to natural areas. In addition, a *National Parks Visitor Segmentation Study* conducted by Market Solutions (1996a) segmented the effective market for Victoria's national parks. This segmentation incorporated the attitudes of the population to national parks in Victoria, the activities enjoyed in parks, the settings preferred in national parks as well as other visitation and demographic behaviour.

Market segments are generally based on demographic, geographic and psychographic¹⁴ factors (Clare, 1997). The segments derived by Market Solutions (1996a) were developed for Parks Victoria based on leisure preferences rather than social attitudes. The identified segments were:

- Natural adventurers
- Escape to nature

¹³ Within this report, nature based tourism and recreation refers to tourism and recreation that is undertaken in national parks and State forests.

¹⁴ Psychographic factors reflect values, attitudes, expectations and motivations (Clare, 1997)

- Young thrillseekers
- Out and about seniors
- Nature made easy
- Social relaxers
- Family focussed
- Home based seniors
- Indifferent youth

A profile of each national park visitor segment is provided in appendix 3a.

Tourism NSW (1994) found that NSW national parks attract all lifecycle groups, with older families accounting for the largest proportion of visitors (26%). Of those who took a national park holiday in the last 12 months (prior to the survey):

- fifty five percent received information about the holiday from friends, 43% from the media and 28% from travel agents;
- forty-two percent booked their holiday directly with an operator and 23% did so through a travel agent;
- thirty-six percent stayed in 3-4 star accommodation, 28% in short stay flats, 10% camped and 30% stayed in some form of caravan park accommodation; and
- visitation to national parks peaked in January, April, July and September.

National park holidayers described their holiday as being healthy, active, providing good photo opportunities, having great experiences, being nice and quiet, nature played a big part and being educational (Tourism NSW 1994).

3.2.2 Activities Undertaken by Visitors to National Parks

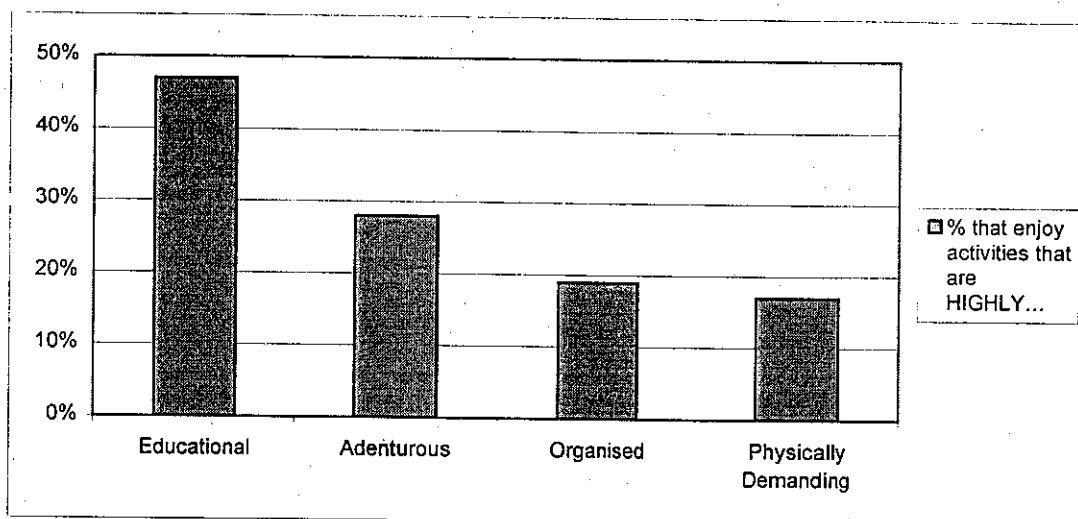
Figure 3a illustrates the results of the Market Solutions (1996a) study when survey respondents were asked to identify the type of national park activities that they enjoyed. This graph reveals that national park visitors mostly enjoy undertaking activities that are highly educational. The proportion of national park visitors that enjoy activities that are highly adventurous, organised and physically demanding are significantly less than the proportion enjoying highly educational activities.

Market Solutions (1996a) also gauged the activities that survey respondents had undertaken in national parks in the past as well as those activities that respondents indicated they would be interested in participating in the future. Figure 3b lists these activities, showing both the level of participation in the past as well as interest in future participation.

As can be seen from figure 3b, across all activities interest in participation is greater than historical participation. This is particularly so for the more specific activities such as caving, horse riding, canoeing and four wheel driving. Also, interest in learning about Aboriginal culture and heritage was significantly greater than actual participation. These figures reveal that the number of persons undertaking activities in national parks has the potential to expand in the future¹⁵.

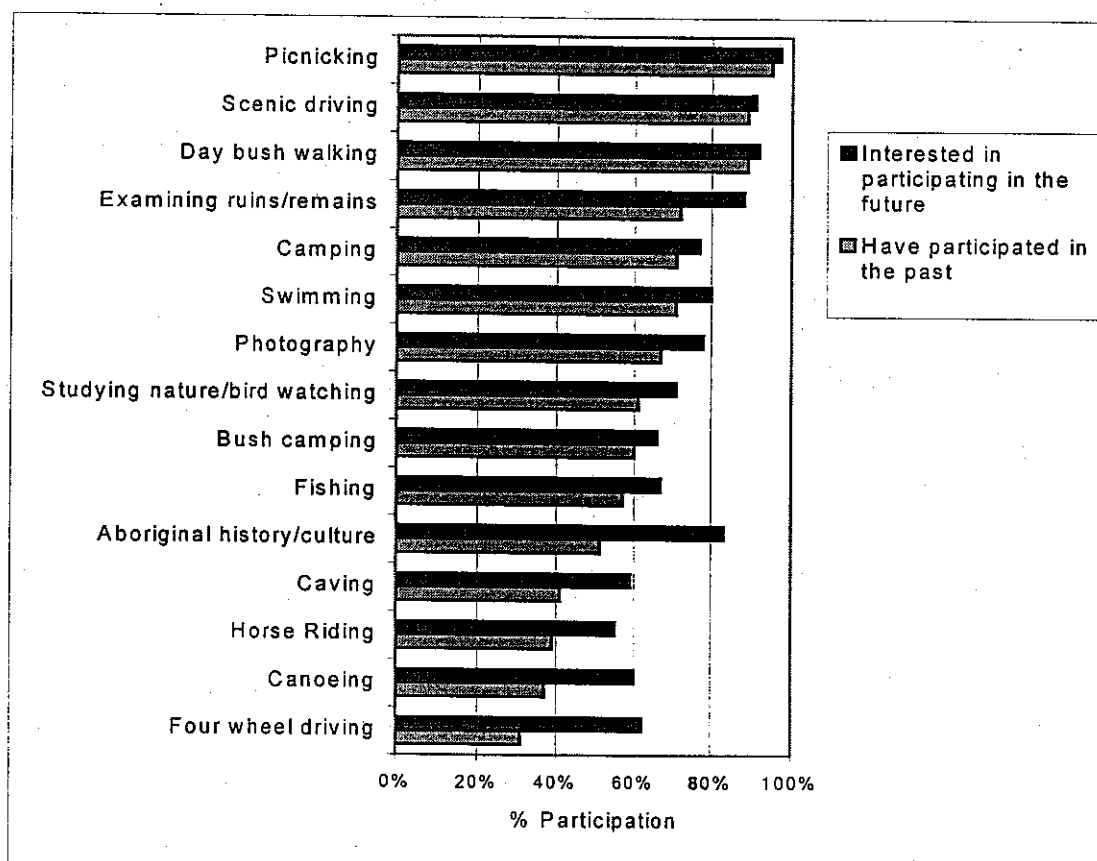
¹⁵ The data may also reveal that people have a natural tendency to overstate likely future participation in activities when gauged on their attitudes to specific activities.

FIGURE 3A TYPES OF ACTIVITIES ENJOYED IN NATIONAL PARKS



Source: Market Solutions (1996a)

FIGURE 3B PARTICIPATION IN NATIONAL PARK ACTIVITIES



Source: Market Solutions (1996a)

3.2.3 Attributes Sought by Visitors

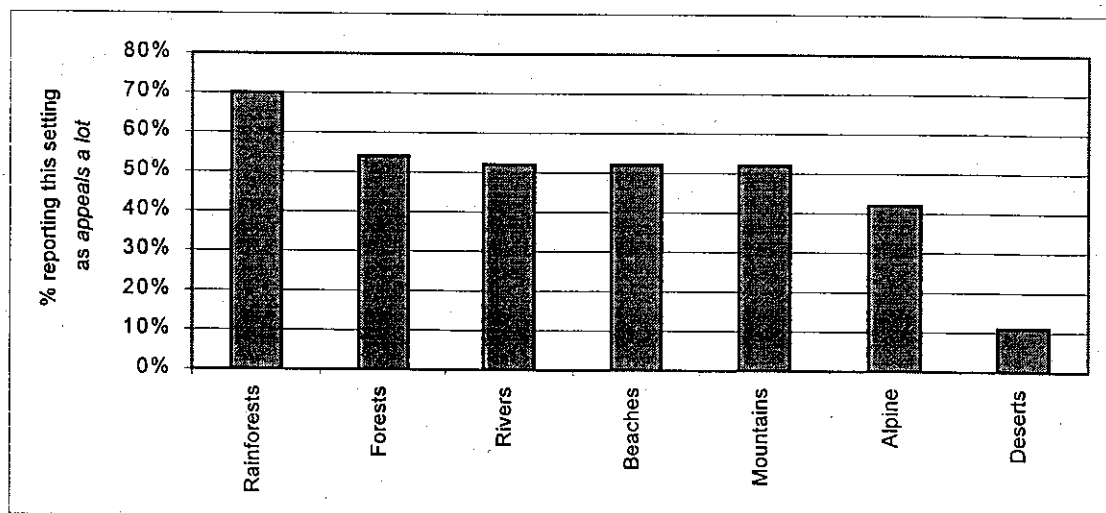
Clare (1997) found that natural areas with the greatest potential as a major destination have:

- interesting wildlife that can be viewed;
- scenic appeal;
- an interesting and significant cultural/historical component;
- are close to a major population centre/international gateway/major traffic route;
- reasonably easy access;
- well-organised management;
- complimentary regional attractions; and
- existing facilities and services such as accommodation.

Key factors that drive the choice of a national park in terms of visitation include whether it is easy to get to, whether there are great walking trails, the provision of multiple things to do, the desire to find a place to relax, the level of facilities available, whether there is good, affordable accommodation available, if there are beautiful rainforests and scenery to view, whether you can get close to nature and whether there is a good place to camp (Clare, 1997).

The appeal of national park settings was measured by Market Solutions (1996a). Figure 3c reveals the proportion of survey respondents that report each setting as appealing to them a lot.

FIGURE 3C APPEAL OF NATIONAL PARK SETTINGS



Source: Market Solutions (1996a)

Figure 3c reveals that rainforests are the most preferred setting for a national park when settings are measured based on appeal to visitors. Forests, rivers, beaches and mountains appealed equally in terms of being a setting for a national park. Most national parks in the southern CRA region have two or more of these settings.

A Victorian-based international visitor segmentation study was completed by Market Solutions in 1996 (Market Solutions, 1996b). This study found that reasons international visitors were satisfied with Australian national parks included:

- Beautiful scenery
- Good/clean facilities
- Green surrounds
- Native animals
- A variety of activities that could be undertaken
- Beautiful flora
- Clean/fresh air

The most appealing aspects of national park trips that were undertaken by international visitors included the plants and animals (identified by 85% of survey respondents), scenery (82%), education (54%) and aboriginal culture (30%) (Market Solutions, 1996b).

Finally, attributes sought by visitors to national parks include and are influenced by the facilities that are provided within parks. Facilities that are seen as essential in a national park include rubbish bins, walking track signs, signage referring to permissible and non-permissible activities, drinking water, information boards, park guide leaflets, short walking circuits, visitor information centre/facilities, a ranger presence and formed walking paths (Market Solutions, 1996a).

3.2.4 National Park Visitation in Australia

Visitation by International Tourists

The International Visitor Survey undertaken by the Bureau of Tourism Research (1999a) found that 34% of international visitors visited a national park in 1997. Visitation levels were highest amongst European, British and North American tourists and lower amongst visitors from Asian countries. Further, visitors who were in Australia for the purpose of a holiday or visiting friends and relatives were more likely to visit a national park than visitors who were in Australia for other purposes (for example, business).

As expected, there is a wide range of reasons why people visit Australia. These reasons vary from country-to-country and within each country. Demand for outdoor and nature-related experiences is high, and this is a key selling point evident in Australian Tourist Commission overseas marketing activity. The nature experience sought, however, is far from generic and ranges from very low involvement (such as visiting a zoo or wildlife park in a city) to tours of the outback. This variation is due to a number of factors, including the stage of development of the market, cultural considerations and time available.

In terms of visitation to national parks, Clare (1997) estimated that in 1993-94 approximately five percent of national park visitation was accounted for by international visitors. Similarly, an in-park survey conducted within the coastal sub-region of the study area by Frank Small & Associates (1995) found seven percent of survey respondents were from overseas. National parks within the southern CRA region that receive above average international visitation include Morton NP and Budderoo NP (Clare, 1997).

Visitation by Domestic Tourists¹⁶

A 1994 Newspoll survey for the Commonwealth government showed that 53% of Australians planned to visit national parks or natural attractions over the next 12 months. Of those surveyed, 54% sited getting close to nature as very important and 46% rated learning about nature as very important. Significantly, this study stated that interest in natural experiences amongst Australians probably exceeds actual participation (Clare, 1997).

In a survey of domestic visitors to national parks, Market Solutions (1996a) found that 62% of survey respondents had taken a national park day trip in the last 12 months. Of these, 36% of respondents had taken three or more national park day trips, indicating a high level of repeat visitation. In terms of overnight trips, only 37% of the population had taken an overnight trip in the last 12 months, with only seven percent undertaking more than one overnight visit in the last 12 months.

A 1993 Tourism NSW study showed New South Wales national parks were ranked behind Queensland, Victoria and Tasmania for their image as being well organised, and behind Tasmania and Victoria for walking trails. Within the southern CRA region, national parks are a key attraction in the Blue Mountains and Snowy Mountains tourism regions and a major attribute in the South Coast, Illawarra and Central West tourism regions. In the Southern Tablelands region, national parks are insignificant tourist attractions (Clare, 1997).

Tourism NSW (1994) surveyed individuals to determine their preferred forms of holidays. The results of this survey indicated that beaches were the favourite holiday destination, with 67% indicating a preference to visit beaches. Visiting parks/wilderness as a form of holiday was ranked seventh, with 22% of respondents indicating a preference for this form of holiday. The research also found that many different holiday types incorporated visits to national parks. Car touring, city holidays, country holidays and outback holidays are each characterised by a greater likelihood to include visits to national parks. Beach-based holidays are less likely to include a national park component.

Lindberg (1997) carried out a community survey for Eurobodalla National Park. This study examined the community issues associated with the establishment of the national park, gazetted on 22 December 1995 and including vacant crown land between Moruya South Head and Tilba Tilba Lake. The issues to arise from this evaluation of the changes that occurred following the park establishment included:

- positive impacts: the conservation of nature; the chance to learn about nature; the quality of scenery; recreational opportunities provided; and the improved control of weeds; and
- negative impacts: can no longer walk dogs; increased traffic associated with tourism; can't drive off-track within the national park; and opportunities for camping and collecting bait either limited or prohibited.

3.2.5 Summary & Discussion

A generic profile of national park based tourism and recreation in Australia is characterised by:

- **Type of Visitors:** national parks attract all lifecycle groups and visitors from a variety of socio-economic backgrounds. Visitation to national parks incorporates both international visitors and domestic visitors, with both types of visitors likely to incorporate a visit to a national park as a component of a larger holiday;

¹⁶ Includes domestic persons who undertake both tourism and recreation in national parks.

- **Seasonality of Visitation:** visitation is greatest during school holiday periods;
- **Repeat Visitation:** repeat day-trip visitation forms a key component of total visitation to national parks. Repeat overnight visitation is less important;
- **Activities Undertaken:** activities that are highly educational are most desired by visitors to parks. Specific activities with the highest level of participation include picnicking, scenic driving, bushwalking, examining scenic remains/ruins, camping and swimming;
- **Attributes Sought:** visitors to national parks seek parks that are scenic, are close to where they live, have good access and facilities, are well-organised and have complimentary regional attractions; and
- **Important National Park Regions in the Southern CRA Region:** regions of importance within the southern CRA region are the Blue Mountains, Snowy Mountains, South Coast, Illawarra and Central West.

Each of these components is reflected within the supply and demand profiles developed specifically for the southern CRA region in section four and five of this report.

3.3 STATE FORESTS

3.3.1 Types of Visitors to State Forests

Chapman concluded a major study in 1995 that developed profiles for bushland users, forest visitors and forest ecotourists. Within this study he segmented visitors to State forests in New South Wales into four groups and estimated the proportion of total visitation that each group accounted for. The identified segments were:

- Life, be in it (29%);
- Back to nature (39%);
- Life, be out of it (19%); and
- Excitement freaks (13%).

A profile of each State forest visitor segment is provided in appendix 3b.

Based on the results of the Chapman (1995) study, it is possible to list several characteristics of visitors to state forests in New South Wales. These include:

- twenty-seven percent visited a forest as part of a family group, whilst 44% indicated they visited as part of a group of friends;
- males were more frequent visitors than females;
- thirty percent of visitors have undertaken tertiary education; and
- ninety-seven percent of visitors travel by private car over a journey of between 2 and 4 hours to reach the forest.

Seventy percent of Chapman's respondents liked their recreational environment "just as it is". Of those who sought some form of improvement, suggested improvements to the recreational environment included forest information signs (sought by 69% of persons seeking improvements), direction signs (54%), drinking water (63%) and improved toilets (61%).

In terms of the demographic profile of bushland recreationists in Eastern Australia, Chapman (1995) found that they had the following characteristics:

- forty-seven percent of respondents undertook multiple visits each year;
- people with tertiary educational qualifications tend to visit more frequently;
- the frequency of visitation increases with age up to 60 years; and
- differences in spending on different bushland aspects vary with age, sex and education.

3.3.2 Activities Undertaken by Visitors to State Forests

Chapman (1995) found the recreational activities undertaken in New South Wales State Forests with the highest levels of participation were:

- Resting/relaxing
- Observing scenery
- Looking at plants and animals
- Swimming
- Walking around the camp
- Having a BBQ
- Picnicking

These activities are generally consistent with the most popular activities preferred by national park visitors (which included picnicking, scenic driving, day bushwalking, exploring ruins and historical remains and camping). This suggests that for the general population, many of the most popular activities undertaken are transferable between national park and State forest settings.

Chapman (1995) found the less popular recreational activities undertaken in New South Wales forests, in terms of participation were:

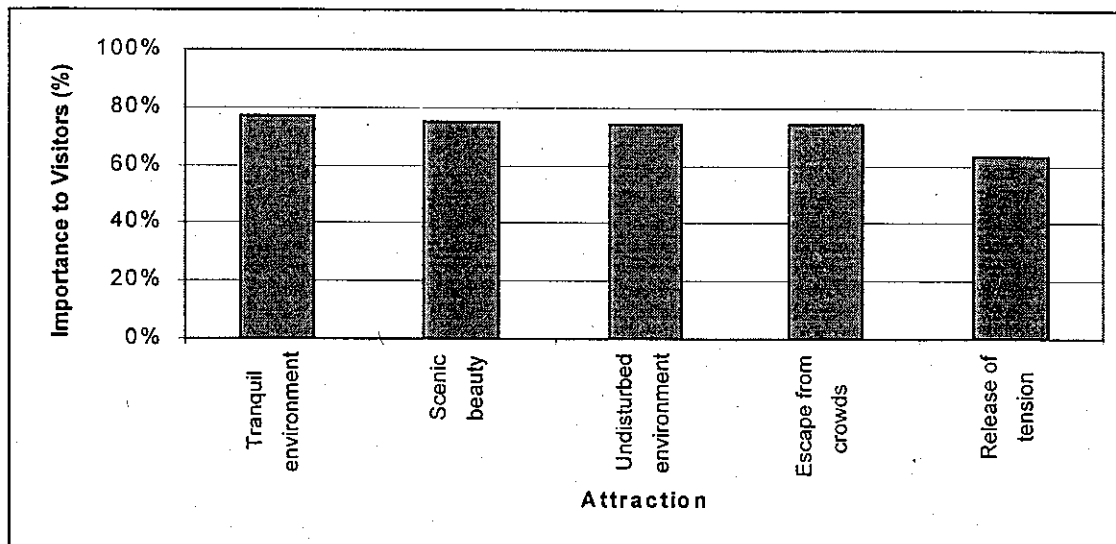
- Hunting
- Trailbike or motorbike riding
- Horse riding
- Cycling
- Fishing from a boat
- Water-skiing
- Canoeing

These activities are more specialised activities that require specific equipment in order to undertake them. Once again, across the entire population in general, there is a reasonable correlation between the activities that are less preferred in State forests and those less preferred in national parks. Despite this, there does remain a significant, specialised market that seeks to undertake these activities in both national parks and State forests.

3.3.3 Attributes Sought by Visitors

Figure 3d summarises the important aspects of State forests that make forests attractive to visitors. These attributes were derived by Chapman (1995) following consultation with visitors to forests within New South Wales.

FIGURE 3D ATTRACTION OF STATE FORESTS TO VISITORS



Source: Chapman (1995)

3.3.4 Summary & Discussion

A generic profile of State forest based tourism and recreation in New South Wales is characterised by:

- **Type of Visitors:** visitation to State forests is dominated by people who seek to be involved in outdoor activities and getting close to the natural environment. Visitation tends to occur in groups (either with family or friends), is more frequently undertaken by males rather than females and is undertaken using private vehicles;
- **Seasonality of Visitation:** similar to national parks, visitation to State forests is greatest during school holiday periods;
- **Activities Undertaken:** the most popular activities undertaken in forests are resting/relaxing, scenic appreciation, swimming, bushwalking and BBQing. Less popular activities (across the entire population) include hunting, trailbike riding, horse riding and cycling/mountain biking. These activities do, however, retain enthusiastic, dedicated participants;
- **Attributes Sought:** visitors to state forests seek a tranquil environment, scenic beauty, an undisturbed environment, a place to release tension and an escape from crowds;
- **Important State Forest Regions in the Southern CRA Region:** regions of importance within the southern CRA region (in terms of state forests), are the South Coast, Illawarra, Southern Tablelands, Snowy Mountains and Central West.

Each of these components is reflected within the supply and demand profiles developed specifically for the southern CRA region in section four and five of this report.

3.4 ECOTOURISM

According to the Ecotourism Association of Australia (1992), ecotourism is defined as *"ecologically sustainable tourism that fosters environmental and cultural understanding, appreciation and conservation."* The National Ecotourism Strategy (1994) defines ecotourism as *"nature-based tourism that involves education and interpretation of the natural environment and is managed to be ecologically sustainable."*

Blamey (1995) states that an ecotourism experience is one in which an individual travels to a relatively undisturbed natural area that is more than 40 kilometers from home, the primary intention being to study, admire, or appreciate the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas. Blamey further defines an ecotourist as anyone who undertakes at least one ecotourism experience in a specified region during a specified time.

There are three components of ecotourism: the nature-based component; educative component; and sustainability component (Blamey, 1995). Clare (1997) notes that the aims of ecotourism (sustainable use, interpretation, sensitivity and benefits to local communities) should become a goal for all tourism.

Clare (1997) also states that individual citizens may support environmental initiatives, but as consumers they may not give much thought to such issues. Ecotourists differ to the extent that they are sensitive to changes in water/air quality, losses in vegetation, loss of wildlife, soil erosion and changes in character and visual appeal.

Chapman (1995) analysed the types of ecotourists that visit forest areas. He found that 54% are core ecotourists looking for natural involvement, 19% use it for personal development, 19% are laid-back ecotourists seeking relaxation and 8% undertake ecotourism as a social activity. His study also found that the things that ecotourists sought from visiting forests were the texture of the forest, the abstract values associated with the forest and the wildlife, water, smells and sounds of the forest.

3.5 FINDINGS OF OTHER RELEVANT STUDIES

Several other important sources provide study-specific information on national park and State forest based tourism and recreation within Australia. These include the Southern Highlands and Illawarra Nature Based Tourism Strategy (NPWS & Tourism NSW, 1997), results from the Tourism NSW attitudinal surveys of 1993 and 1994 and the Shoalhaven Master Tourism Plan (Shoalhaven City Council, 1996). Results of these studies are particularly interesting as they focus upon areas that are included within or bordering the southern CRA region.

The following section briefly reviews each of these studies.

3.5.1 Southern Highlands & Illawarra Nature Based Tourism Strategy

The Southern Highlands and Illawarra Nature Based Tourism Strategy (NPWS & Tourism NSW, 1997) involved a survey of residents of the greater metropolitan area of Sydney. The research revealed that a large proportion of Sydney people sought to include some form of nature-based activities as part of their short breaks and holidays. The study found:

- nineteen percent rated a visit to a State Forest as "very appealing" and 26% rated it as "appealing";
- twenty-five percent rated a visit to a National Park as "very appealing" and 32% rated it as "appealing";
- twenty-three percent rated short bushwalks "very appealing" and 27% rated them as "appealing"; and
- seventeen percent rated bushwalks that last most of the day as "very appealing" and 22% rated them as "appealing".

The survey also probed the non activity-specific attributes that Sydney residents thought were an important component of their holiday experience. These included:

- a desire to escape the city (84%);
- an unspoiled environment (80%);
- the peace and quiet of the Australian bush (74%);
- a desire to discover out of the way places (69%); and
- a desire to keep away from the crowds (68%).

Respondents were also asked to nominate activities they participated in during a visit to the Illawarra region. Survey results indicated that 27% had visited a State forest, 49% had visited a national park and 27% had visited a nature reserve. In terms of activity-specific information, the study also revealed some information about bushwalking. Of people who had visited the Illawarra, 49% had undertaken a short bushwalk or nature walk, 31% had been bushwalking for the day and 5% had undertaken an overnight bushwalk.

The survey also revealed that there are a number of activities that relate to nature and the environment that are becoming more important to the Sydney market. For over half the Sydney market, taking an interest in nature and the environment, appreciating the natural sights and landscapes of Australia and enjoying what the environment has to offer are becoming more important. In terms of visitation to national parks, the survey found that 38% of the Sydney market are undertaking visits more often than they used to.

3.5.2 Tourism NSW Attitudinal Survey, 1993 and 1994

Attitudinal surveys undertaken by Tourism NSW in 1993 and 1994 revealed the preferences of Sydney-based persons in undertaking activities whilst on short breaks and long stays. This research revealed that bushwalking was the fifth most popular activity sought by respondents, after sightseeing, dining, shopping and visiting friends. Twenty-two percent of the short break market and 31% of the long holiday market indicated a preference for bushwalking whilst on their break. Visiting national parks was the sixth most popular activity identified, with 19% of the short break market and 32% of the long holiday market indicating a preference for this activity (Tourism NSW, 1994).

This attitudinal research reveals that there is a core market within Sydney that is interested in undertaking nature-based activities such as bushwalking, especially amongst the long stay holiday market. Given the close proximity of many of the major national parks in the southern

CRA region to the Sydney market, this suggests that there is Sydney-derived demand for these activities within national parks in the study area¹⁷.

3.5.3 Shoalhaven Tourism Master Plan

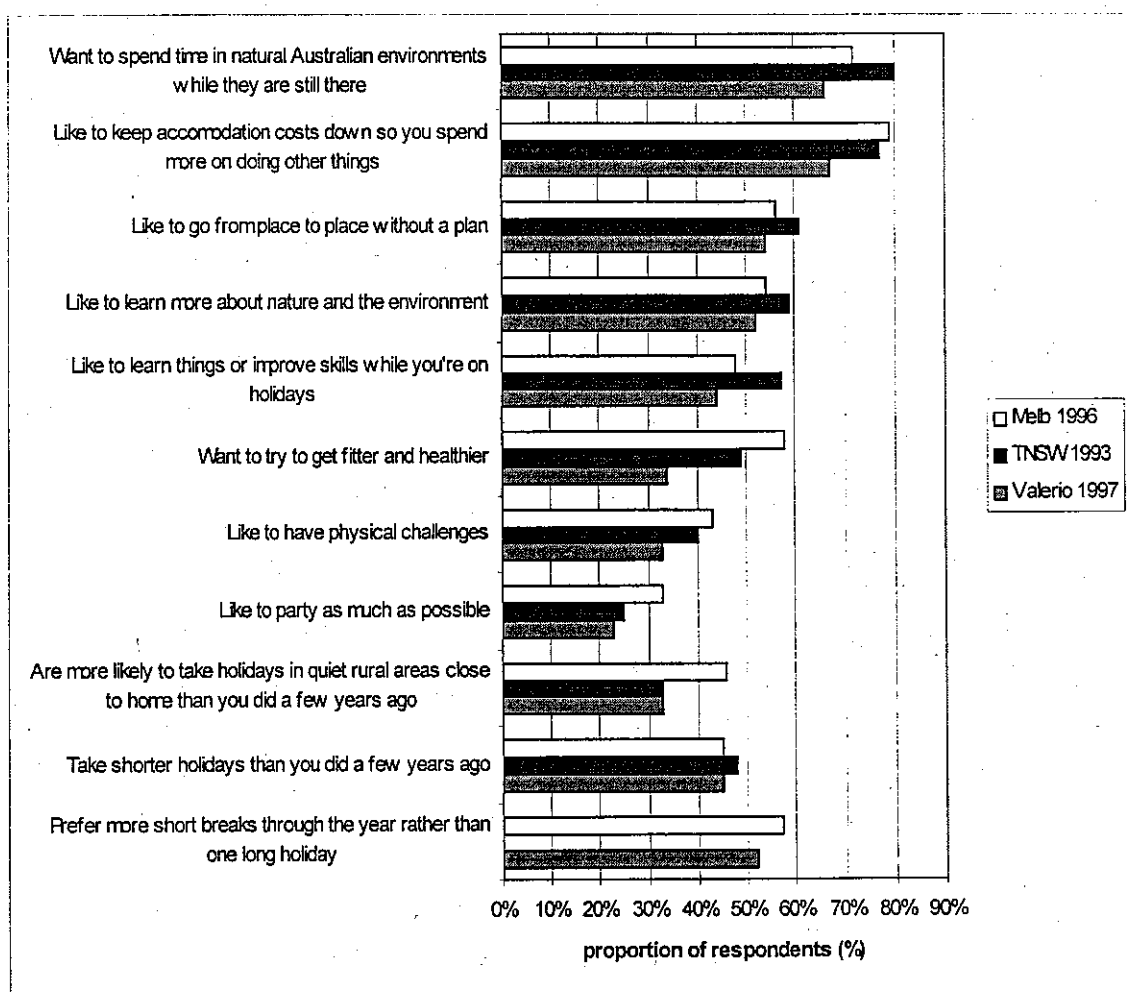
As an input to the Shoalhaven Tourism Master Plan (Shoalhaven City Council, 1996), a telephone survey of the Sydney market was undertaken to gauge the awareness of respondents to particular features in the Shoalhaven area. Awareness of Murramarang and Budawang National Parks was 38% and 34% respectively, 34% for Pigeon House Mountain and 12% for Red Rocks Nature Reserve. In terms of the attributes that respondents associated with the area, only 11% identified bushwalks and only 3% identified national parks/wildlife.

3.5.4 Comparative Analysis of Study Results

A comparative analysis of the results of various tourism surveys allows firm conclusions to be drawn with regards attitudes of domestic persons to nature based tourism and attributes sought from nature-based visits. A comparison of results from the Tourism NSW (1993) attitudinal survey, an unpublished survey undertaken in Melbourne (1996) and the Southern Highlands and Illawarra Nature Based Tourism Strategy (1997), reveals a close degree of similarity, particularly in terms of factors related to the environment.

Figure 3e graphically represents these results. The percentage of respondents who identified with each statement across the three surveys is indicated.

¹⁷ Major national parks that are close to the Sydney market include Blue Mountains, Kanangra-Boyd and Morton National Parks.

FIGURE 3E COMPARATIVE ANALYSIS OF SURVEY RESULTS

Source: Tourism NSW (attitudinal surveys), Southern Highlands & Illawarra Nature Based Tourism Strategy (1997) and unpublished Melbourne survey (1996).

Comparison of these results reveals that between six and eight persons out of ten seek to 'spend more time in natural Australian environments while they are still there'. In addition, between five and six people out of ten wish to learn more about nature and the environment while away from home.

3.6 SUMMARY & DISCUSSION

The generic information presented in this section provides a brief overview of the profile of national park and State forest based tourism and recreation within Australia. The following two sections build upon this generic profile in order to develop a supply and demand perspective of the profile of park and forest based tourism and recreation within the southern CRA region. Section four discusses the supply-side of this profile whilst the demand-side is presented in section five.

4. SUPPLY SIDE PROFILE OF TOURISM & RECREATION: SOUTHERN CRA REGION

4.1 OVERVIEW

The supply side profile of national park and State forest based tourism and recreation incorporates three distinct entities that are associated with the supply of nature based tourism and recreation opportunities:

- National Parks and Wildlife Service;
- State Forests of New South Wales; and
- commercial tourism operators.

Each of these acts as a "supplier" of tourism and recreation goods and services. The State agencies directly manage the natural resources for the purposes of use for which the resource is required (for example, in the case of State forests, uses include conservation, forestry, tourism and recreation, apiary and grazing). Commercial operators act as a supplier of a product that uses the resources that are managed by the State agencies.

In the following section, the supply side profile of park and forest based tourism and recreation in the southern CRA region is examined. This profile incorporates a description of:

- the number of national parks and State forests that are included within the southern CRA region;
- the proportion of parks and forests that are available for the public to undertake tourism and recreation activities;
- the permissible activities that can be undertaken under each land tenure;
- the direct employment and expenditure generated by NPWS and SFNSW in relation to tourism and recreation;
- the facilities provided by State agencies for tourism and recreation purposes within the region;
- the nature of the commercial tourism and recreation industry in the region, including a discussion of the number of operators, the size of the industry and the direct employment and expenditure generated by the industry;
- the presence of Aboriginal/cultural tourism operators within the region; and

- the future supply side developments that will impact upon the profile of the industry, including development plans being enacted by both commercial and non-commercial (State agency) operators.

The supply side profile that is developed utilises both baseline and trend data that was collected during the study. Where only limited quantitative trend data is available, qualitative conclusions are drawn on past and future trends.

4.2 PARKS AND FORESTS IN THE SOUTHERN CRA REGION

4.2.1 National Parks

The National Parks and Wildlife Service has jurisdiction over 45 national parks, nature reserves and State recreation areas within the southern CRA region¹⁸. These natural areas are contained within six NPWS districts. Table 4a shows the distribution of these national parks across the three sub-regions of the southern CRA region.

TABLE 4A NATIONAL PARKS WITHIN THE SOUTHERN CRA REGION

Sub-region	Number of National Parks
Coastal	32
Western Tablelands	7
Northern Tablelands	6
Total Southern CRA Region	45

Source: National Parks and Wildlife Service (1999)

The coastal sub-region accounts for 71% of the national parks within the study area. This suggests that national park based tourism and recreation is more important within this sub-region than the other two sub-regions. A complete listing of national parks within the southern CRA region is contained within appendix 4a.

4.2.2 State Forests

There are 82 State forests contained within the southern CRA region. Table 4b shows the distribution of these state forests across the three sub-regions.

TABLE 4B STATE FORESTS WITHIN THE SOUTHERN CRA REGION

Sub-region	Number of State Forests
Coastal	49
Western Tablelands	26
Northern Tablelands	7
Total Southern CRA Region	82

Source: State Forests of NSW (1999a)

As with parks, the coastal sub-region accounts for the majority of forests in the study area (60%). Forest based tourism and recreation within this sub-region is therefore assumed to be greater than within the other two sub-regions. A complete listing of the State forests contained within the southern CRA region is contained within appendix 4b.

¹⁸ The term 'national park' is used within this study to collectively refer to national parks, nature reserves and State recreation areas.

4.3 AREA OF PARKS AND FORESTS AVAILABLE FOR TOURISM AND RECREATION PURPOSES

4.3.1 National Parks

It is difficult to provide a precise estimate of the exact area or proportion of total park area that is available for tourism and recreation usage. The management of a national park aims at minimising disturbance to natural and cultural heritage (NPWS, 1998). As a result, restrictions on various activities are imposed to varying degrees depending upon site-specific characteristics as well as the form of national park tenure that exists. For instance, the proportion of total park available for tourism and recreation varies considerably between nature reserves, national parks and wilderness areas¹⁹.

Tourism and recreation activities are undertaken in national parks across the southern CRA region. However, within nature reserves, several limitations to recreation and tourism exist. These limitations include:

- areas being in remote areas with difficult access;
- areas being set aside for scientific research and education;
- areas having visitation discouraged to protect endangered species of plants and animals;
- areas being remote wilderness nature reserves set aside for conservation;
- areas believed to contain unexploded ordnance from an adjacent military range; and
- areas being significant geological sites.

A greater understanding of the total area of national parks available for recreation use within the southern region is gained by examining the activities that are permissible under this land tenure. Section 4.4 provides a detailed discussion of the type of activities that can be undertaken in national parks and the restrictions that govern their adoption. However, no estimate is made of the total national park area that is devoted to tourism and recreation. Appendix 4c, does however, provide a list of the total area of national park contained within the southern region by individual park.

The future trend in the total area of national park available for tourism and recreation purposes will be influenced by Government policy, the extent of tenure change between State forest and national park, as well as plans of management or policy guidelines developed for individual parks. It is proposed that to accurately monitor such trends, parks be examined on an individual basis, incorporating all site-specific attributes that influence park management.

4.3.2 State Forests

It is also difficult to gauge the precise area and percent of forest land that is available for general tourism and recreation within the study region. As part of Australia's obligations to the Montreal Process²⁰ (directed towards developing and monitoring criterion and indicators for sustainable forest management), some efforts have been made in recent years to estimate the proportion of total forested land in Australia that is managed for general tourism and recreation.

¹⁹ A discussion of types of activities allowed under national park tenure is provided in section 4.4.

²⁰ The Montreal Process Criteria will be examined in more detail in section nine of this report.

Australia's contribution to the *First Approximation Report for the Montreal Process* states that, "in principle, all public forested lands except scientific reserves, cultural areas or where operations preclude it, are available for general recreation and tourism." This report estimates that Australia-wide, 79% of State forest lands are managed for recreation (Montreal Process Working Group, 1997).

Discussions with State Forests of NSW personnel indicate that across the region, almost all areas devoted to State forest are available for tourism and recreation purposes. Variations on access exist in specific areas. Access restrictions exist in areas where there are flora reserves, plantations, nurseries, harvest areas (and areas immediately surrounding harvest areas) and other areas deemed not suitable or safe for tourism and recreation purposes (Watt, M., State Forests of NSW, pers. comm., August 1999).

A discussion of methods to monitor future trends in the area of State forest available for tourism and recreation is provided within section nine of this report.

4.4 PERMISSIBLE ACTIVITIES AND TENURE

4.4.1 National Parks

It is difficult to develop a list of tourism and recreation activities that can be undertaken within national parks in the southern region. Management of individual parks is guided by management plans that are developed for each park. Management plans outline the policies and framework for management that apply to that particular park. Therefore, activities that can be undertaken within national parks will vary according to the management plan adopted for each park. Furthermore, activities that can be undertaken within a particular park may vary between different locations within the park.

Despite the site-specific nature of permissible activities under national park tenure, it is valuable to gain an appreciation of the generic type of activities that are able to be undertaken in a national park. Table 4c provides a generic listing of recreational and tourist activities within NPWS areas. Permissible activities, related consent requirements and non-permissible activities within national parks are listed.

The information that is provided relates to recreational and tourist activities in Service areas including national parks, nature reserves, historic sites, State recreation areas, karst conservation reserve or Aboriginal area. The information is based on provisions within the *National Parks and Wildlife Act 1974* and current NPWS Field Management Policies. The provisions or prohibitions only relate to recreational and tourist activities and do not relate to those provided for research and management activities (Hampton, S., NPWS, pers. comm., August 1999).

The general tenure based information provided in this table would need to be checked with individual parks and individual park plans of management, especially in the case of estimating impacts on tourism and recreation under the negotiated outcome developed during the negotiation phase of the CRA process.

TABLE 4C LISTING OF RECREATIONAL AND TOURISM ACTIVITIES IN NPWS AREAS

Activity	Permitted	Require Consent or Conditions Apply	Not Permitted
Picnicking (facility based)	✓		
BBQ, Camp fire ((facility based)		✓	
Camping (facility based)	✓D		
Remote pack camping (no facilities)		✓D	✓some
Self reliant activities			
- Bushwalking	✓		
- Spot lighting	✓		
- Exercising / cross country running	✓D		
<i>Water activities</i>			
- Canoeing, kayaking, rafting		✓	
- Power boating		✓D	
- Sailing, sail boarding	✓		
- Mooring		✓D	
- Swimming	✓		
- Fishing	✓		
- Spearfishing, netting			✓
<i>Vehicle access</i>			
- 2WD vehicle	✓D		
- 4WD/off-road vehicle/bus	✓D		
- Oversnow vehicle		✓P (Kosciu.NP only)	✓
- Off-road driving			✓
- Car rallying			✓
Cycling	✓D		
Mountain bike cycling	✓D		
Skateboard, rollerskating	✓D		✓some
<i>Adventure activities</i>			
- Abseiling		✓P, D	
- Rock climbing		✓P, D	
- Handgliding, paragliding		✓P, D	
- Canyoning		✓P, D	
- Caving		✓P	
- Orienteering and rogaining		✓P	✓some
Horse riding		✓D	✓some
Overnight horse riding		✓P, D	✓some
Shooting			✓*
Snow/ski activities	✓		
Nature appreciation	✓		
- Bird watching	✓		
- Scenic viewing	✓		
- Rock and mineral fossicking			✓
- Take, trap, capture fauna			✓
- Collect seed, plant material			✓
- Photography, painting	✓		
Cultural heritage appreciation	✓		
Cultural heritage site visit		✓	
Take animal/pet into park		✓**	
Set up or disturb beehive			✓unless licensed
<i>Expected tourist activities</i>			
Lodge/cabin/huts (use of existing facilities)	✓D	✓L	
Group camping		✓P	
Commercial bushwalking tours		✓L	✓some

Commercial vehicle tours		✓L	✓some
Commercial boat tours		✓L	✓some
Commercial cultural heritage tours		✓L	

TABLE 4C (CONT) LISTING OF RECREATIONAL AND TOURISM ACTIVITIES IN NPWS AREAS

Activity	Permitted	Require Consent or Conditions Apply	Not Permitted
Private/commercial trading in park		✓L	✓some
Group cross country running		✓P	
Powered aircraft: (low altitude, light aircraft)		✓P	✓some
Non-powered aircraft: (hot-air ballooning, hanggliding)		✓P	

Source: NPWS (1999a)

Key:

"P" – consent required via permit, written approval or registration.

"D" – Activity can occur in designated sites, routes or areas as specified in a plan of management, management guidelines or policy.

"L" - lease, licence, concession for operators

"Some" - not permitted in some Service areas including wilderness areas, nature reserves, Aboriginal sites, historic sites, environmentally sensitive areas

* - unless designated shooting range located in State Recreation Area.

** - only permit trained assistance pet eg. Guide Dog

4.4.2 State Forests

A listing of tourism and recreation activities permissible within State forests similar to the list provided in table 4c is unable to be provided. However, the following activities are amongst the most common that can be undertaken within State forests:

- General recreation
- General sightseeing
- Camping
- Bush walking
- Four-wheel driving
- Mountain bike riding
- Trail bike riding
- Horse riding
- Exercising dogs
- Fire wood collection
- Fishing
- Swimming
- Picnicing

Restrictions may apply during particular times of the year if roads are closed or in the immediate vicinity of harvesting operations. In addition, organised and large-scale event recreation is organised on a case-by-case basis. 'Special use recreational activities' include car rallies, horse endurance rides, orienteering, sled dog races and mountain bike events. Unique recreation pastimes may also involve the lease of State forest land. These include pistol clubs,

rifle clubs, mountain bike competition riding and regional botanic gardens (Watt, M., State Forests of NSW, pers. comm., August 1999).

Table 4d provides a listing of the recreational permits granted by SFNSW in 1997-98. This material has been sourced from the *State Forests of NSW Annual Report 1997-98* and is for all State forests in New South Wales.

TABLE 4D RECREATIONAL PERMITS GRANTED IN STATE FORESTS, 1997-98

Permits for organised recreational activities	No. of permits
Eco tourism/ 4x4 tours	54
Horse, trail and endurance rides	32
Car rallies/ go carts	38
Motor bike rallies	6
Mountain bike rallies	30
Orienteering/mountain runs/triathlon	37
Bushwalking	23
Bowhunting/archery	60
Other	22
Education	27
Training/exercises	152

Source: State Forests of NSW (1999)

This data provides an overview of the permits issued for organised recreational activities by type of activity undertaken. Although it does not reflect activities that do not require a permit, it does provide a description of the varied organised activities undertaken and the intensity in which these activities are undertaken.

4.4.3 Differences in Permissible Activities by Tenure

If tenure change from State forest to national park was to occur, then there are several activities undertaken in State forests that would either not be permitted or be constrained within a national park. A comparison of permissible activities under State forest and national park tenure reveals:

- activities that are either not permitted or only permitted in some national parks include remote pack camping, spearfishing, off-road driving, rallying, orienteering and rogaining (in some national parks), horse riding (in some national parks), shooting, fossicking and commercial tours and trading (in some parks);
- activities that can only be undertaken in designated sites, routes or areas (as specified in a plan of management, management guideline or policy) of national parks include camping, cross-country running, two and four wheel drive vehicle access, cycling, mountain bike riding and skateboarding/rollerskating;
- activities that require a consent or conditions apply within national parks include barbecues, remote pack camping, canoeing, kayaking and rafting, abseiling, rock climbing, hangliding, canyoning, caving, orienteering and rogaining, horse riding, visiting cultural heritage sites, group camping, group cross country activities and commercial activities; and
- in addition, pets are not allowed to be brought into national parks (trained assistance pets are allowed).

As discussed earlier, the extent to which activities would be restricted in national parks following a tenure change from State forest, will vary from park-to-park. Across-the-board impacts on activities cannot be precisely specified. Section seven of this report discusses the impact of the negotiated outcome on tourism and recreation activities. Where possible, site-

specific data is provided to estimate the impact of tenure change on individual activities in those regions affected by the negotiated outcome. Section eight provides a discussion of management options that can help to optimise sustainable tourism and recreation potential to natural areas and mitigate any adverse social and economic impacts associated with changes in land tenure.

4.5 EMPLOYMENT AND EXPENDITURE OF STATE AGENCIES

4.5.1 National Parks

Regional NPWS staff provided estimates of NPWS expenditure and employment (measured as full-time equivalents) in relation to visitor/tourism activities for each national park in the southern region. From this, a profile of the ongoing (annual) NPWS investment in tourism and recreation can be measured²¹.

Expenditure

Estimates of ongoing (annual) expenditure were provided for most national parks within the southern region. Where data gaps existed, examining expenditure in similar national parks within close proximity enabled expenditure estimates to be developed. Similar national parks were those that had similar annual visitation, facilities, access and were in the same sub-region. Data gaps were most evident in the coastal sub-region²².

Table 4e provides a breakdown of NPWS expenditure directed towards tourism and recreation by sub-region.

TABLE 4E NPWS EXPENDITURE ON TOURISM AND RECREATION

Sub-region	Annual Expenditure (\$ millions)
Coastal	
Western Tablelands	0.9
Northern Tablelands	6.0
Total Southern CRA Region	0.4
	7.3

Source: derived from National Parks and Wildlife Service data (1999a)

Expenditure is dominated by that which occurs within the western tablelands sub-region. This reflects the expenditure associated with Kosciuszko National Park²³.

It is extremely difficult to apportion total NPWS expenditure between different activities (for example, conservation activities and tourism activities). In undertaking tourism and recreation studies in other CRA regions Gillespie (Eden, 1998) and Buultjens et al (UNE & LNE, 1998) drew upon Worboys (1997) and adopted a figure of 52% of total NPWS regional expenditure being associated with tourism and recreation. Data provided by regional NPWS staff in this study, indicates that expenditure on tourism and recreation within the southern region accounts for between 0% and 55% of total national park expenditure, when expenditure is examined on a park-by-park basis. Overall, it is estimated that as a proportion of total Service expenditure in the southern region, tourism and recreation would account for less than 50% of the total.

NPWS staff were asked to comment upon whether expenditure had increased or decreased over the last five years and whether expenditure was anticipated to increase or decrease over the next

²¹ Expenditure estimates relate to ongoing annual expenditure. They include capital expenditure incurred over the next 12 months at Jervis Bay and Abercrombie River National Parks. They do not include sunk costs incurred in the past associated with tourism and recreation infrastructure development.

²² This may reflect the vast number of national parks in this sub-region.

²³ Expenditure associated with this national park is estimated to be a 'high side' estimate as expenditure associated with winter activities is not excised from total expenditure (in section five of this report, winter visitation to Kosciuszko National Park is excised from total visitation).

three years. Table 4f shows the proportion of national parks in each sub-region for which expenditure over the last five years has increased, decreased and been stable.

TABLE 4F CHANGE IN EXPENDITURE OVER THE LAST FIVE YEARS

Sub-region	Proportion of national parks whose expenditure has (%)...			
	Increased	Decreased	Stable	No data supplied
Coastal	41%	6%	28%	25%
Western Tablelands	83%	0%	17%	0%
Northern Tablelands	86%	0%	14%	0%

Source: National Parks and Wildlife Service (1999a)

Over the last few years, expenditure within national parks has predominantly been increasing. Looking forward, table 4g shows the proportion of national parks in each sub-region for which expenditure is anticipated to increase or decrease over the next three years.

TABLE 4G ANTICIPATED CHANGE IN EXPENDITURE OVER THE NEXT THREE YEARS

Sub-region	Proportion of national parks whose expenditure will (%)...			
	Increase	Decrease	Remain Stable	No data supplied
Coastal	13%	31%	16%	41%
Western Tablelands	0%	83%	0%	17%
Northern Tablelands	0%	86%	14%	0%

Source: National Parks and Wildlife Service (1999a)

In contrast to increased expenditure over the last five years, national park expenditure is anticipated to decline over the next three years²⁴. This anticipated decline in expenditure is most evident in the tablelands sub-regions and is more concentrated in smaller national parks and nature reserves.

The impact of a decline in expenditure on the provision of tourism and recreation opportunities will depend on the relative share of total expenditure allocated to tourism and recreation. A decline in the share of expenditure directed to tourism and recreation may result in a decline in ongoing maintenance associated with facilities, scaled down capital works programs and fewer resources (measured in terms of expenditure and employment) directed towards maintaining and expanding present recreation opportunities.

Employment

As with the expenditure estimates, total estimates of employment associated with tourism and recreation activities are difficult to make and should be interpreted with some caution. This is due to the difficulties in apportioning total employment between conservation, tourism and other activities.

Table 4h provides estimates of NPWS employment in relation to tourism and recreation for each sub-region within the southern CRA region. Data gaps were overcome using the approach adopted for expenditure estimates above.

TABLE 4H NPWS EMPLOYMENT ASSOCIATED WITH TOURISM AND RECREATION

Sub-region	Employment (full-time equivalents)
Coastal	23

²⁴ At Jervis Bay National Park expenditure is anticipated to increase over 1999-00, before decreasing in subsequent years and in Kosciuszko National Park expenditure is anticipated to decline depending on the ability of the Service to increase revenue.

Western Tablelands	50
Northern Tablelands	6
Total Southern CRA Region	79

Source: derived from National Parks and Wildlife Service data (1999a)

Once again, employment associated with tourism and recreation is greatest in the western tablelands sub-region, reflecting the influence of Kosciuszko National Park.

It is assumed that there is a direct link between movements in expenditure and changes in employment associated with the Service. Thus, any anticipated decline in expenditure over the next three years would imply that human resources would also be scaled back (in relation to the change in expenditure). Obviously, significant variation in these outcomes would occur between different parks, reflecting variations in the relative importance of tourism and recreation between different parks.

4.5.2 State Forests

State Forests of NSW staff provided estimates of expenditure and employment associated with tourism and recreation activities in the southern region. There were greater data gaps in the estimates provided for State forests than for national parks, necessitating further extrapolation of estimates in order to provide a complete data set.

Expenditure

The proportion of total expenditure that is devoted to tourism and recreation in State forests is estimated to be considerably less than the equivalent proportion in national parks. Data supplied for the coastal sub-region indicated tourism and recreation expenditure accounted for 5% of total expenditure. In addition, comments supplied by State Forests of NSW indicated that total expenditure in the western tablelands sub-region is dominated by forestry activities. On this basis, it is estimated that expenditure devoted to tourism and recreation accounts for 5% of total expenditure within the study region.

Table 4i provides estimates of total State Forests of NSW expenditure associated with tourism and recreation by sub-region.

TABLE 4i SFNSW EXPENDITURE ON TOURISM AND RECREATION

Sub-region	Annual Expenditure (\$ '000s)
Coastal	250
Western Tablelands	30
Northern Tablelands	10
Total Southern CRA Region	290

Source: derived from State Forests of NSW data (1999)

Expenditure in the coastal sub-catchment dominates total regional expenditure. This reflects the greater number of State forests in this region and the associated higher levels of annual visitation (annual visitation is discussed in section five of this report).

Within the coastal sub-catchment, expenditure associated with SFNSW activities has declined over the last five years. Regional staff indicate that expenditure is anticipated to continue to decline over the next three years. This differs from the western tablelands sub-region, where regional SFNSW staff indicated that expenditure had increased over the last five years and was

anticipated to continue to increase over the next three years²⁵. Expenditure data provided for forests in the northern tablelands sub-region indicated that expenditure had either been static or increasing for forests in this region over the last five years, and was anticipated to be stable or continue to increase over the next five years.

Employment

Table 4j lists the number of full-time employees associated with tourism and recreation activities in the southern region. As with estimates of expenditure, extrapolation from existing data was used to overcome data gaps. Forestry activities account for the greatest proportion of total employment.

TABLE 4J SFNSW EMPLOYMENT ASSOCIATED WITH TOURISM AND RECREATION

Sub-region	Employment (full-time equivalents)
Coastal	5
Western Tablelands	1.5
Northern Tablelands	0.5
Total Southern CRA Region	7

Source: derived from State Forests of NSW data (1999)

Lower estimates of expenditure and employment associated with State forests relative to national parks reflect a number of factors. These include:

- the different purposes for which the land is managed in forests, and the relative importance of forestry activities relative to tourism and recreation;
- the lower visitation levels associated with State forests relative to national parks (refer to section five of this report); and
- other internal management and public policy issues that are beyond the scope of this report (for example, State Government funding allocations).

4.6 FACILITIES IN PARKS AND FORESTS

4.6.1 National Parks

NPWS personnel were asked to indicate the types of facilities that are provided within individual national parks in the southern region. The extent of facility development will reflect (to a degree) the scale of investment that the Service has made within each national park and will also be linked to the level of visitation associated with individual parks. It was noted in section three of this report that facilities are a key factor driving the choice to visit a national park (Tourism NSW, 1994). Market Solutions (1996a) also noted that attributes sought by visitors to national parks include and are influenced by the facilities provided.

NPWS personnel were asked to list the facilities in each park rather than nominate facilities from a standard list. Therefore, there exists potential for variation in data provided between parks²⁶. Conclusions that can be drawn from the data that was provided include:

²⁵ Expenditure data was not provided for all State forests in the western tablelands and northern tablelands sub-regions.

²⁶ What is defined as 'facilities' may therefore vary between parks.

- the most common facilities provided in national parks are picnic tables, walking tracks, interpretive signs, walking signs, barbecue facilities and toilets;
- less common facilities provided include boat ramps, parking facilities, education facilities and visitor centres;
- of the 45 national parks in the southern region, 20 do not have any facilities for tourism and recreation. Most of these are nature reserves where visitation is either restricted or discouraged; and
- for those parks with facilities, complimentary facilities are usually provided rather than stand-alone facilities. For instance, where barbecues are provided, picnic tables are provided and where walking tracks are provided, interpretive and walking signs are provided. This illustrates an investment commitment to particular parks by the Service.

To gauge likely future trends in investment in facilities within national parks, NPWS personnel were asked to nominate whether there were plans to develop facilities over the next three years, and if there were, whether any budget had been set-aside for these purposes. Table 4k outlines the proportion of national parks in each sub-region that have plans to develop facilities over the next three years.

TABLE 4K PROPORTION OF PARKS WITH PLANS TO DEVELOP FACILITIES OVER THE NEXT THREE YEARS

Sub-region	Proportion of national parks with plans to develop facilities over the next three years (%)...		
	Yes	No	No data supplied
Coastal	38%	56%	6%
Western Tablelands	29%	71%	0%
Northern Tablelands	33%	67%	0%

Source: National Parks and Wildlife Service (1999a)

The majority of national parks (27 out of 45) across all sub-regions do not intend to develop facilities over the next three years. However, each of the parks (or nature reserves) that do not presently have facilities indicated that they do not intend to develop facilities over the next three years. By ignoring those parks that do not presently have facilities, 64% of parks that presently have facilities indicated they intend to develop these facilities over the next three years. That is, 16 out of 25 national parks²⁷.

The expenditure associated with development plans is difficult to estimate across all cases, as in many instances the application of these plans depends upon future funding outcomes. For those parks that did provide estimates of approximate budget set-aside for facility development, aggregate expenditure across the three sub-regions was in excess of \$735 000²⁸. Across the study area, this represents approximately 10% of estimated annual expenditure on tourism and recreation within parks. If annual expenditure at Kosciuszko National Park is ignored, then the approximate budget set-aside for facility development represents over 50% of annual expenditure devoted to tourism and recreation within the southern region.

4.6.2 State Forests

The extent of facility development in State forests is less than that in national parks. Of the 82 State forests in the southern region, data regarding facilities was provided for 72 forests. Of

²⁷ Data was not provided for two national parks.

²⁸ This does not include an estimate of \$20 million for Kosciuszko National Park which will be spent mainly on a road works program.

these, 38 do not have any facilities associated with them. Conclusions that can be drawn from the data that was provided include:

- the most common facilities provided are barbecues, picnic tables, walking tracks, camping facilities, toilets and interpretive material;
- less common facilities include lookouts and boat ramp areas; and
- as noted above, for the majority of State forests, no facilities exist. This is directly linked to the lower levels of visitation associated with these areas.

As noted for national parks, regional State Forests of NSW staff provided listings of facilities for each forest rather than nominating facilities from a standard list. This may lead to some variation in the data provided between forests and between regions. It is assumed for the purpose of this study that access roads are not regarded as facilities.

Table 41 lists data from the *State Forests of NSW Annual Report, 1997-98*. This data shows the recreational facilities provided in State forests across New South Wales. This is useful to gain an appreciation of the relative frequency of different types of facilities within forests in New South Wales.

TABLE 4L RECREATIONAL FACILITIES IN NEW SOUTH WALES STATE FORESTS

Recreational facilities provided	No. of facilities
Roadside rest areas	160
Forest drives (marked)	30
Forest walks (marked)	90
Lookouts	84
Camping areas	308
Camps/huts/cottages	17
Other	2

Source: State Forests of NSW (1998)

It is worth noting once again that in a study of forest users undertaken by Chapman (1995), seventy percent indicated they liked their recreational environment "just as it is". However, for those that sought some form of improvement, suggested improvements to the recreational environment included forest information signs (sought by 69% of persons seeking improvements), direction signs (54%), drinking water (63%) and improved toilets (61%).

Future development plans for facilities in State forests are not widespread. Individual forests that have plans to develop facilities over the next three years include the development of toilets at Belanglo, a maintenance and improvement program for Tallaganda forest drive as well as other works at Marraguldrie, Green Hills and Bago State forests. In addition, plans for facility improvements at Jenolan State forest are presently being designed.

4.7 NATIONAL PARK AND STATE FOREST BASED COMMERCIAL TOURISM AND RECREATION INDUSTRY

4.7.1 Introduction

The primary tool that was utilised to develop a profile of commercial tourism operators within the southern region was a survey of tourism and recreation operators whose businesses utilise State forests and national parks within the region. Coupled with information derived from discussions with non-commercial operators (NPWS and SFNSW), the results of this survey

allow a firm profile of park and forest based commercial tourism and recreation in the southern region to be developed.

Eighty-eight commercial operator surveys were sent out to potential survey respondents. The sample was developed with the help of Tourism NSW regional managers, local government representatives, regional tourism information centres, NPWS and SFNSW personnel and via searches of relevant directories of operators including published listings (for example, NRMA travel guides) and the Internet. Surveys were directed towards businesses that utilise State forests. Some respondents utilise both forests and parks, however the primary driver of the sample was that businesses at least used forests, if not both forests and parks.

Of the 88 surveys sent out, 47 were returned. Nine of these were returned from businesses that no longer operated or where no longer at their old premises. Accounting for these returns, a response rate of 48% was achieved for the commercial operator survey. Fifty percent of responses were received from the coastal sub-region, 29% from the western tablelands sub-region and the remainder from the northern tablelands sub-region.

The survey of operators showed that:

- seventy-eight percent of respondents offered activities to the public that involve the use of State forests, or plan to offer such activities over the next five years; and
- of these, 86% of operators conducted their business within forests in the southern CRA region.

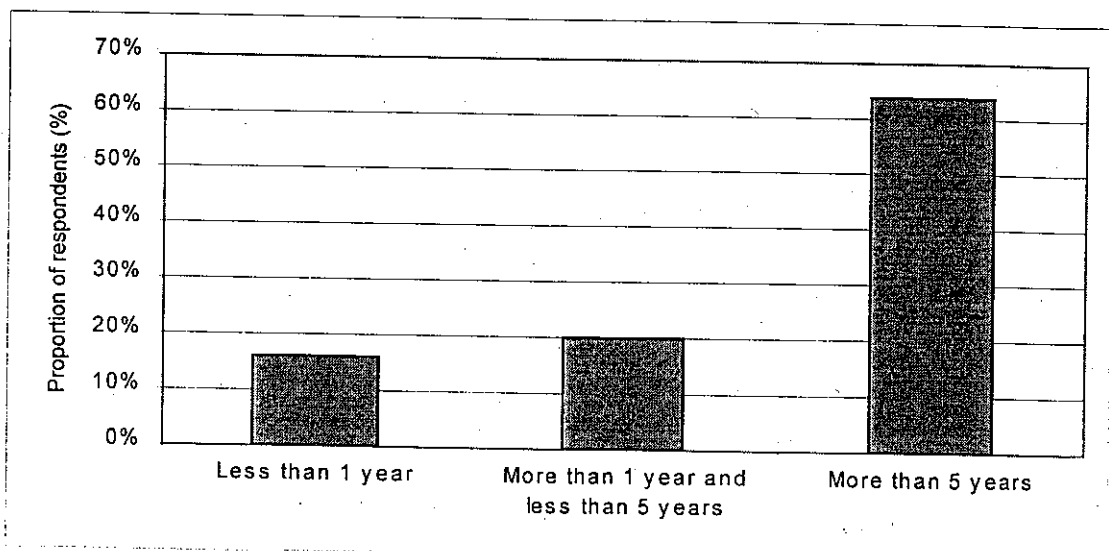
A copy of the commercial tourism and recreation operator survey is included in this report as appendix 4d.

4.7.2 Industry Overview

A key component of developing a profile of commercial tourism operators is to determine how long operators have been in existence within the region and whether or not they intend to remain a part of the industry in the immediate future. This allows key trends that influence the profile of the industry to be observed.

Figure 4a lists the proportion of commercial operators that have been undertaking commercial State forest based operations over different time periods.

FIGURE 4A YEARS INVOLVED IN COMMERCIAL STATE FOREST TOURISM AND RECREATION ACTIVITIES



Therefore, the majority of commercial operators in the southern region have been undertaking commercial forest based activities for greater than five years. A further 20% had been taking clients into forests for more than one but less than five years. This indicates that the commercial operator industry has a well-established presence within the region.

Also of note is the fact that there is a component within the industry that have been in operation for less than one year. This indicates that there has been a recent inflow into the industry of new businesses. These new businesses bring with them new employment opportunities as well as new investment dollars into the industry.

In terms of the future trends associated with operators within the industry:

- eighty eight percent definitely plan to offer State forest based activities over the next three years;
- twelve percent were unsure if they would offer activities or not over the next three years; and
- importantly, there were no survey respondents who indicated they would definitely not offer activities over the next three years.

These results reveal that there is a strong commitment amongst the majority of present operators to continue to offer activities over the next few years. If new businesses continue to enter the industry and established businesses do not contract their operations, this suggests that the contribution of the industry to the economy of the southern region will expand in the immediate future.

Using survey data to estimate the total number of operators within the region is difficult, as there is no definitive listing of the number of operators within the region. As mentioned, the sample was developed using a number of sources rather than being randomly chosen from a definitive listing. Estimating the proportion of the industry that was not targeted during the development of this sample is difficult. For the purposes of this study, it is assumed that the industry may be 25% to 40% greater than formed the sample size. There is no objective basis for this estimate.

This estimate will vary depending upon the definition of what constitutes a tourism and recreation industry operator. Furthermore, the sample for this study was based on businesses that offer State forest based activities to the public. Therefore, our description of industry size relates to businesses that offer at least some form of State forest based activities (businesses may offer both forest and park based activities, so long as they at least offer forest based activities).

4.7.3 Client Numbers

Data that was received²⁹ from survey respondents on the number of clients that each company had taken into forested areas over the last three years indicates that visitation associated with commercial operators increased from 1996-97 to 1997-98, but has since stabilised. In 1996-97, the average number of clients per business was 590. This increased to 610 in 1997-98, stabilising at this level in the following year.

These estimates reveal the small-scale nature of many of the commercial tourism and recreation businesses that rely upon the use of forests and parks in the region. The number of clients taken

²⁹ Not all respondents provided estimates of the number of clients that they had received over the last three years.

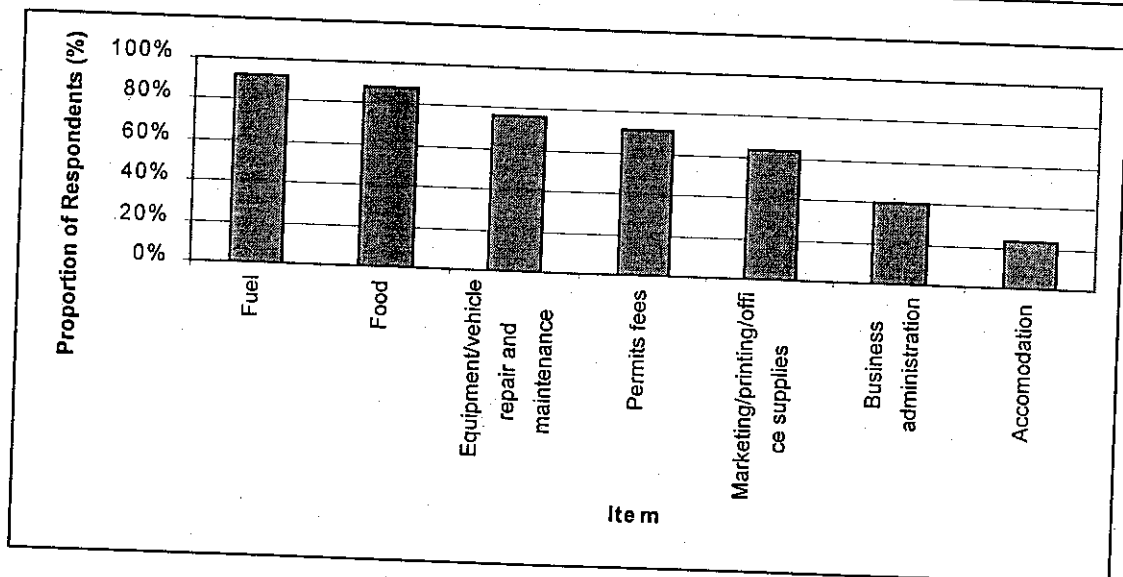
into State forests to undertake activities in 1998-99 varied from a minimum of ten for one business, to a maximum of 2 600 for another.

These findings are supported by other studies of commercial tour operators. In a study of commercial tour operators that use public lands in New South Wales, Watt (1998) found that 51% of businesses attracted less than 500 clients per year. In addition, a study of licensed tour operators in Victoria in 1996 (DNRE, 1996) found that only three percent of operators had more than 800 visitor days per year.

4.7.4 Expenditure

Survey respondents were asked to nominate those local goods and services that were used as part of their state forest based business within the local shire of the operator. Figure 4b illustrates the proportion of operators that use the most important items associated with their business.

FIGURE 4B LOCAL GOODS AND SERVICES USED BY COMMERCIAL OPERATORS



Other items nominated by respondents were equipment hire, local guides, stock and animal costs, services provided by other local businesses, new vehicle costs and souvenirs.

Respondents were also asked to estimate the combined expenditure on these local goods and services over the past 12 months. This was expenditure on those items specifically related to State forest based activities. Although not all respondents provided estimates of annual local expenditure associated with the forest component of their business, average expenditure was \$32 500. However, there was significant variation in estimates provided from less than \$1 000 to \$100 000. Table 4m illustrates the range of annual business expenditure.

TABLE 4M ANNUAL BUSINESS EXPENDITURE ON LOCAL GOODS & SERVICES

Range of Annual Expenditure on Local Goods & Services	Proportion of Total Respondents
\$0 - \$15 000	31%
\$15 000 - \$40 000	31%
\$40 000 - \$75 000	25%
\$75 000 - \$100 000	13%

Table 4m reinforces the conclusion that the commercial forest and park based tourism and recreation industry is dominated by small-scale businesses. This conclusion is supported by Watt (1998) who found that across New South Wales, 54% of commercial tour operators that use public lands do not rely on their business as their main source of income.

Based on an average local expenditure per business of \$32 500, it is estimated that total expenditure related to State forest based activity in the commercial tourism and recreation industry in the southern region ranges between \$1.0 and \$1.1 million. Note that this refers only to expenditure associated with activity in State forests, and only to those sums of money that are expended within the local shire of the operator. Commercial operator expenditure on activity in national parks was not quantified given the focus of the survey on operators that utilised forest areas.

4.7.5 Employment

Based on the survey results, commercial operators that offer State forest based activities are small-scale businesses when measured in terms of employment. The average number of full-time jobs associated with these businesses (encompassing both state forest based components of the business and other components) was 3.2 full-time jobs in 1998-99. The average number of full-time jobs directly associated with State forest based activities in 1998-99 was 1.9. Based on assumptions regarding the total size of the commercial State forest based tourism and recreation industry, it is assumed that direct employment associated with commercial State-forest based tourism and recreation in the southern region is between 60 and 67 full-time equivalents. Note that this does not make any allowance for employment associated with commercial tourism and recreation that is based in national parks.

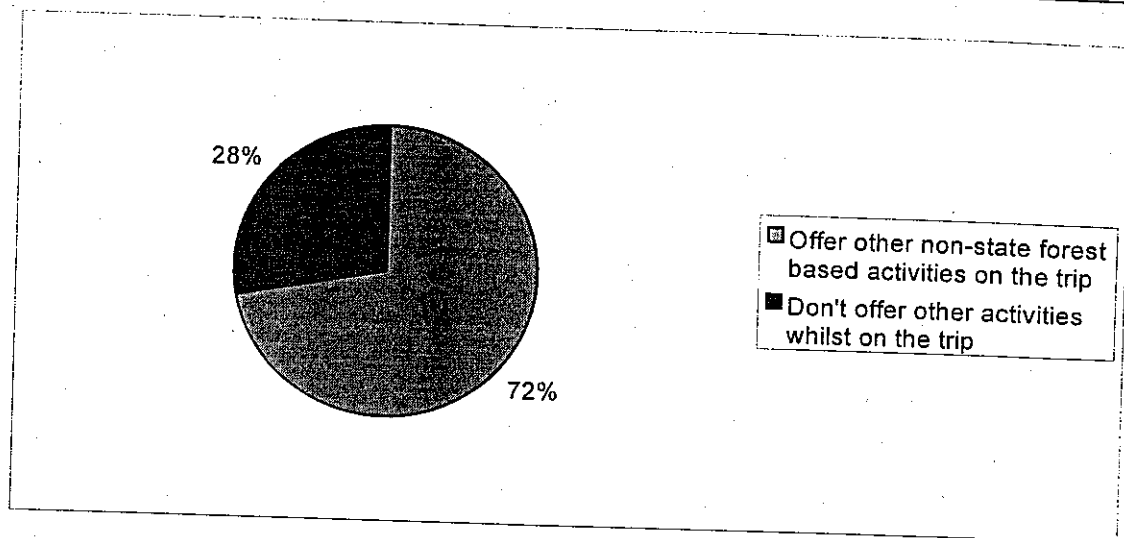
4.7.6 Activities Undertaken by Commercial Operators

The survey revealed that the majority of tourism operators that offer State forest based activities also offer other diversified activities to visitors. Sixty five percent of respondents indicated that the State forest activity they offer was not the only commercial activity that they undertook. That is, almost seven of ten businesses offered other activities in addition to the State forest based activities.

In addition to the non-State forest activities offered by tourism operators, a majority of businesses also offer non-State forest based activities whilst on the State forest based trip. That is, in addition to offering activities in the State forest whilst on a trip, they also undertake other non-State forest activities whilst on the same trip. Figure 4c illustrates this.

From figure 4c, it can be seen that 78% of commercial operators undertake other activities whilst they are on the State forest trip. Overall, the average amount of total trip time spent on State forest activities was 52%. This indicates that there is a vast amount of other activities that are undertaken in addition to the State forest based activity. Seventy-two percent of commercial operators indicated they visited a national park as part of the trip that was undertaken.

FIGURE 4C PROPORTION OF OPERATORS THAT OFFER NON-STATE FOREST ACTIVITIES WHILST ON STATE FOREST BASED TRIPS



4.8 INDIGENOUS TOURISM AND RECREATION

Information specifically related to the supply side of Aboriginal and cultural tourism and recreation is to be forthcoming following the submission of this draft report. In lieu of the provision of specific information for the southern region, table 4n provides a summary of the number of Aboriginal sites that are protected within State forests across New South Wales. This information is derived from the *State Forests of NSW Annual Report 1997-98*.

TABLE 4N ABORIGINAL SITES PROTECTED WITHIN STATE FORESTS IN NEW SOUTH WALES

Type of aboriginal site	Number
Natural features	99
Sites of historical importance	172
Art and ceremonial sites	68
Site associated with tools, artifacts and hunting	968
Site associated with traditional aboriginal life	614
Not Classified	25
Total	1 946

Source: State Forests of New South Wales (1998)

Information pertaining to visitation to Aboriginal/cultural sites within State forests is provided within the demand side profile of tourism and recreation in section six of this report.

4.9 FUTURE SUPPLY SIDE DEVELOPMENTS

There are several factors that will directly influence future developments within the supply side profile of national park and State forest based tourism and recreation in the southern region. The most obvious factor is the impact of tenure change upon the management of natural areas. Section seven of this report provides a discussion of the implications that the negotiated outcome will have for commercial and non-commercial entities that are a part of the supply side profile.

Other factors that will influence future changes in the supply side profile include:

- internal management and policy decisions made by the State agencies, particularly with regard the relative importance of management objectives (conservation, tourism and recreation in parks and forestry, tourism and recreation in forests);
- levels of visitation to national parks and State forests in the southern region, which are in turn dependent upon the growth rates associated with international and domestic visitation; and
- changes in the demand side profile associated with national park and State forest based tourism and recreation.

The following section briefly summarises future developments that are either planned or anticipated by each of the entities involved with the supply side profile. These developments are based on current conditions and do not incorporate any potential impacts associated with tenure change. As noted above, such impacts are discussed in section seven of this report.

4.9.1 National Parks

In the immediate future, the NPWS is:

- anticipating a decline in expenditure over the next three years, particularly in those parks in the tablelands sub-regions;
- associated with an anticipated decline in expenditure over the next few years will be greater pressure being placed upon existing employment resources; and
- despite these anticipated outcomes, there is a commitment to upgrade and develop facilities within many parks that presently have visitor facilities.

4.9.2 State Forests

In the immediate future, SFNSW:

- is expecting the decline in expenditure within the coastal sub-region, that has been evident over the last few years, to continue over the next three;
- however, expenditure within the tablelands sub-regions is anticipated to either remain stable or increase over the next three years;
- impacts upon employment associated with tourism and recreation will therefore vary between sub-regions; and
- future development and upgrade plans for facilities within forested areas are not widespread across the region, but are scheduled to occur in some forests.

4.9.3 National Park and State Forest Based Commercial Tourism and Recreation Industry

As part of the commercial operator survey, respondents were asked to indicate whether they had a future development plan associated with the forest based activities that they offer. Eighty one percent of commercial operators indicated that they were actively involved in planning for a business expansion/development some time in the next three years.

Types of activities that were listed by operators in relation to these development plans were:

- undertaking and expanding four-wheel driver training, tours and tag-a-longs;
- building and maintaining trails;
- moving to utilise other areas in addition to State forests, including national park areas;
- hiring additional staff;
- introducing, improving and expanding accommodation facilities;
- undertaking an environmental education program;
- investigating eco-cabin proposals;
- increasing expenditure on advertising, marketing and brochures;
- purchasing additional vehicles;
- lobbying tourism organisations and service organisations; and
- expanding into a variety of specific activities including trailbike riding, orienteering, fly fishing, canoeing, kayaking, bushwalking, mountain biking and horse riding and horse trekking.

4.10 SUPPLY SIDE PROFILE SUMMARY

Key points associated with the supply side profile of national park and State forest based tourism and recreation in the southern CRA region include:

- State agencies manage 45 national parks and 82 State forests across the three sub-regions of the study area;
- permissible tourism and recreation activities differ according to the form of tenure governing landuse. Site-specific attributes within parks and forests are an important determinant of permissible activities within individuals areas;
- NPWS and SFNSW undertake expenditure and devote human resources to tourism and recreation across their managed lands. Changes in the level of expenditure and employment resources available in the future will impact upon the management of parks and forests for tourism and recreation purposes;
- the level of facilities provided within parks and forests is an indicator of the investment made by State agencies in the tourism and recreation component of their management of public lands;
- the park and forest based commercial tourism and recreation industry, though dominated by small-scale businesses, provides an important contribution to the supply side profile of nature based tourism and recreation within the region;
- Aboriginal and cultural sites protected on forested lands are spread across New South Wales and provide the potential to support indigenous State forest based tourism and recreation operators; and
- future developments in the supply-side profile will be influenced by many factors, including the negotiated outcome determined as part of this CRA process.

5. DEMAND SIDE PROFILE OF TOURISM & RECREATION: SOUTHERN CRA REGION

5.1 OVERVIEW

The demand side profile of national park and State forest based tourism and recreation in the southern CRA region incorporates both users and potential users of parks and forests. The profile is developed with a primary focus on State forest based activity³⁰. Baseline and trend data is used within the profile to present both a snapshot as well as a summary of temporal variations in the profile.

The profile was developed with the aid of a State forest user survey undertaken as part of the study (a copy of this survey is provided in appendix 5a). One hundred and twenty five survey responses were received from users of State forests in the southern region. These users were from both within and outside the study area and undertook activities in forests either as part of organised clubs/associations or with friends/peers or alone. Information was also derived from commercial and non-commercial national park and state forest operators (as discussed in the supply-side section) as well as primary and secondary sources used throughout the study.

In the following section, the demand side profile of forest and park based tourism and recreation in the southern CRA region is examined. This profile incorporates a description of:

- the estimated number of annual tourism and recreation visitors to national parks and State forests within the southern CRA region;
- the activities undertaken by visitors to parks and forests;
- the attributes of parks and forests that are most often sought by visitors;
- the characteristics of State forest visitation within the region;
- the origin of visitors to State forests within the region;
- the role of Aboriginal and cultural sites within the demand profile for State forests;
- the impacts of seasonal influences on visitation throughout the year;
- the restrictions that users indicate impede upon their use of parks and forests in the region; and
- the recent and future trends in opportunities and activities undertaken in parks and forests.

³⁰ This is because under the negotiated outcome, profiling and trend information is used to assess the impact of changes in land tenure from State forest to national park. Therefore, greater prominence is given to assessing that State forest activity that will be directly affected due to a change in the tenure governing the land upon which these activities are undertaken.

5.2 ESTIMATED VISITATION TO PARKS AND FORESTS IN THE SOUTHERN CRA REGION

5.2.1 National Parks

An estimate of visitation to national parks in the southern CRA region was made by surveying district offices of the NPWS to gauge visitation levels for individual national parks. An estimation of total national park visitation in the region for 1998-99 is provided in table 5a.

TABLE 5A ESTIMATED VISITATION TO NATIONAL PARKS, 1998-99

Sub-region	Estimated Visitors
Coastal	2 340 000
Western Tablelands ¹	1 060 000
Northern Tablelands ²	50 000
Total	3 450 000

Source: National Parks & Wildlife Service (1999)

Note:

1. The estimate of visitation for the western tablelands sub-region includes visitation to Kosciuszko National Park. Visitation to Kosciuszko National Park is amended to excise visitation associated with the snow and snow sports over the six month winter period. It is estimated that 70% of total annual visitation to Kosciuszko National Park occurs over this six-month winter period (Harber, A., pers. comm., NPWS, September 1999).
2. The estimation of visitation for the northern tablelands sub-region includes only that visitation within parts of national parks that are included in the southern CRA region.

As can be seen, the coastal sub-region is the most important in terms of estimated visitor numbers. This is due to three main influences:

- the greater number of national parks in this sub-region relative to the other two sub-regions (32 out of a total of 45 national parks);
- a larger population base on the coast relative to inland areas of the southern region; and
- a greater level of total tourism visitation (related to all aspects of tourism, not just nature based) to the coast relative to the tablelands sub-regions.

Developing a trend of visitation to national parks over recent years is difficult due to a lack of available data. Across many national parks, NPWS personnel were unable to provide an estimate of visitation to national parks for years prior to 1998-99. To overcome this data gap, the preferred forecast growth in visitor numbers to national parks adopted by Gillespie (1998, Eden CRA) from Worboys (1997), is utilised. This preferred forecast growth rate is 2.25% per annum.

By assuming that growth in national park visitation has matched this preferred growth rate over the last few years, estimates of historical visitor numbers to national parks can be made. Table 5b lists these estimates of total national park visitation in the southern CRA region.

TABLE 5B ESTIMATED HISTORICAL NATIONAL PARK VISITOR NUMBERS

Year	Estimated Visitors (millions)
1994-95	3.16
1995-96	3.23
1996-97	3.30
1997-98	3.37
1998-99	3.45

To estimate future visitation associated with national parks in the southern region, this preferred growth rate is applied to actual visitation estimates for 1998-99. Table 5c lists forecast future national park visitation in the southern region based on this preferred annual growth rate.

TABLE 5C FORECAST FUTURE NATIONAL PARK VISITOR NUMBERS

Year	Estimated Visitors (millions)
1998-99	3.45
1999-00	3.53
2000-01	3.61
2001-02	3.69
2002-03	3.77
2003-04	3.86
2004-05	3.94
2005-06	4.03
2006-07	4.12
2007-08	4.21

Although the methodology adopted in this study to estimate historical and future national park visitation is unrefined, it does provide an overview of observed trends in national park visitation. The degree to which the estimated future trend in visitor number is accurate depends upon numerous factors including:

- management of national parks, including access conditions governing the use of national parks;
- broader domestic visitation trends;
- international visitation trends; and
- public policy (which influences the number of national parks in the region).

Also, no assumptions regarding carrying capacities and sustainable visitation levels are incorporated within the adopted methodology. Another weakness of the adopted methodology is that different types of visitors to national parks are not identified (different types of visitors will have different growth rates for visitation). A discussion of the segmentation of total national park visitation into different types of visitors is provided within section six of this report. Different types of visitors are categorised as:

- international tourists
- domestic tourists
- domestic recreational visitors.

5.2.2 State Forests

Similar to national parks, an estimate of total visitation to State forests was made based on data supplied by State Forests of NSW district personnel. In some limited cases, estimates were not provided for some smaller state forests. Estimates of visitation for these areas were made based upon similar forest areas within the sub-region and site-specific information that was available (for example, location of State forest, proximity to population centres, level of access, facilities available, etc.).

Table 5d lists estimates of total annual visitation to State forests in the southern CRA region for 1998-99.

TABLE 5D ESTIMATED VISITORS TO STATE FORESTS

Sub-region	Estimated Visitors
Coastal	420 000
Western Tablelands ²	70 000
Northern Tablelands ³	10 000
Total	500 000

Source: State Forests of NSW (1999)

As with national parks, the coastal sub-region is the most important in terms of total visitation to State forests. The reasons for this are the same as noted above for national parks. In the case of State forests, 49 of a total of 82 are located within the coastal sub-region. Visitation within the northern tablelands sub-region is estimated to be considerably lower than the other two sub-regions, reflecting in part, the fact that there are only seven State forests located within this sub-region.

Utilising the preferred forecast growth rate described above (2.25%), estimates can be made of historical and forecast future visitation levels associated with forests in the southern region. Table 5e estimates historical State forest visitation between 1994-95 and 1998-99.

TABLE 5E ESTIMATED HISTORICAL STATE FOREST VISITOR NUMBERS

Year	Estimated Visitors ('000s)
1994-95	457
1995-96	468
1996-97	478
1997-98	489
1998-99	500

Table 5f lists estimates of future forecast State forest visitation based on the preferred forecast growth rate identified by Worboys (1997).

TABLE 5F FORECAST FUTURE STATE FOREST VISITOR NUMBERS

Year	Estimated Visitors ('000s)
1998-99	500
1999-00	511
2000-01	523
2001-02	535
2002-03	547
2003-04	559
2004-05	571
2005-06	584
2006-07	597
2007-08	611

Interpretation of these estimates should be made keeping in mind the limitations to the adopted methodology, as discussed in the national park section above.

To gauge the importance of State forests within the southern region in terms of total forest based tourism and recreation within New South Wales, it is necessary to examine the proportion of total tourism and recreation activity undertaken in State forests that is undertaken within the study area. Table 5g lists estimates of the proportion of all total State forest activity undertaken within New South Wales that is undertaken within the southern region. Results are based on the user survey undertaken as part of this study and are provided for visitation levels in 1998-99.

TABLE 5G PROPORTION OF TOTAL NEW SOUTH WALES STATE FOREST ACTIVITY UNDERTAKEN IN THE SOUTHERN CRA REGION

	Proportion of all State Forest activity undertaken within New South Wales over the last 12 months that has taken place in the southern CRA region (%)
All	12%
Most	50%
Some	36%
Very Little	1%
None	1%

Based on table 5g, it can be seen that the southern region is an important area for State forest usage within New South Wales³¹. Although historical and future trends in this data are unable to be provided, an indicator of changes in market share is provided by trends in visitation to non-metropolitan regions in New South Wales as described in section two of this report. In addition, other factors that would influence the share of total New South Wales forest activity undertaken in the southern region include changes in regional populations and changes in the supply side profile of forest based tourism and recreation, particularly those changes related to tenure change of public land from State forest to national park.

The State forest user survey asked respondents to nominate State forests in the southern CRA region that they had visited over the last 12 months. The survey results indicated that the most visited State forests within each sub-region were:

- coastal sub-region: Buckenbowra, Dampier, Monga, Moruya, Bodalla, Badja, Tallaganda, Yalwal, Bago, Boyne, Mogo, Currowan and Wandera;
- western tablelands sub-region: Bondo, Micalong, Wee Jasper, Tumut, Maragle and Red Hill; and
- northern tablelands sub-region: Gurnang, Jenolan and Vulcan.

5.3 ACTIVITIES UNDERTAKEN IN NATIONAL PARKS AND STATE FORESTS

Numerous data sources were used to gauge the activities undertaken by visitors to national parks and State forests. These included surveys with NPWS and SFNSW personnel and the commercial tourism and recreation industry survey and State forest user survey undertaken as part of this study. The following section provides an overview of the activities undertaken in the southern CRA region under both forms of land tenure.

5.3.1 National Parks

As part of the surveys undertaken with NPWS district staff, personnel were asked to identify the main activities that were undertaken in national parks. The most popular activities undertaken in parks include:

- bushwalking
- fishing

³¹ These results would be expected in part, due to the fact that the survey was targeted at users and potential users of State forests in the southern region.

- water based activities (including swimming)
- camping
- canyoning and caving
- picnicing
- sightseeing
- four wheel driving.

Other activities undertaken to a lesser degree include horse riding, fauna appreciation, geological activities, bird watching, weekend courses and abseiling.

As part of the State forest user survey, respondents were asked to nominate whether they also visited national parks, and if so, the activities they undertook within national parks. Eighty-nine percent of survey respondents indicated that they visited national parks in addition to State forest visits. Activities nominated by users of national parks included

- bushwalking
- camping
- four wheel driving
- photography
- sightseeing
- fishing
- horse riding
- picnicing
- bird watching
- flora and fauna appreciation
- swimming.

5.3.2 State Forests

State Forests of NSW personnel were asked to indicate the main activities that are undertaken within the forests of the southern region. The most popular activities identified by agency staff were:

- picnicing
- bushwalking
- scenic driving
- camping
- horse riding
- collecting fire wood
- mountain bike riding
- fishing
- four wheel driving

- dog walking.

Other less common activities identified by SFNSW personnel included canoeing, rogaining, mushrooming, car rallies, sled dogs, shooting and fossicking.

In addition to those activities nominated by agency personnel, users of State forests and commercial tourism and recreation operators were asked to nominate those activities they observed being undertaken in State forests during visits. Survey respondents were asked to nominate activities from a list compiled for them as well as suggesting any other activities not otherwise listed. Table 5h lists the most popular and less popular activities observed by forest users and commercial operators during their visits to State forests.

TABLE 5H ACTIVITIES OBSERVED IN STATE FORESTS BY USERS AND COMMERCIAL OPERATORS

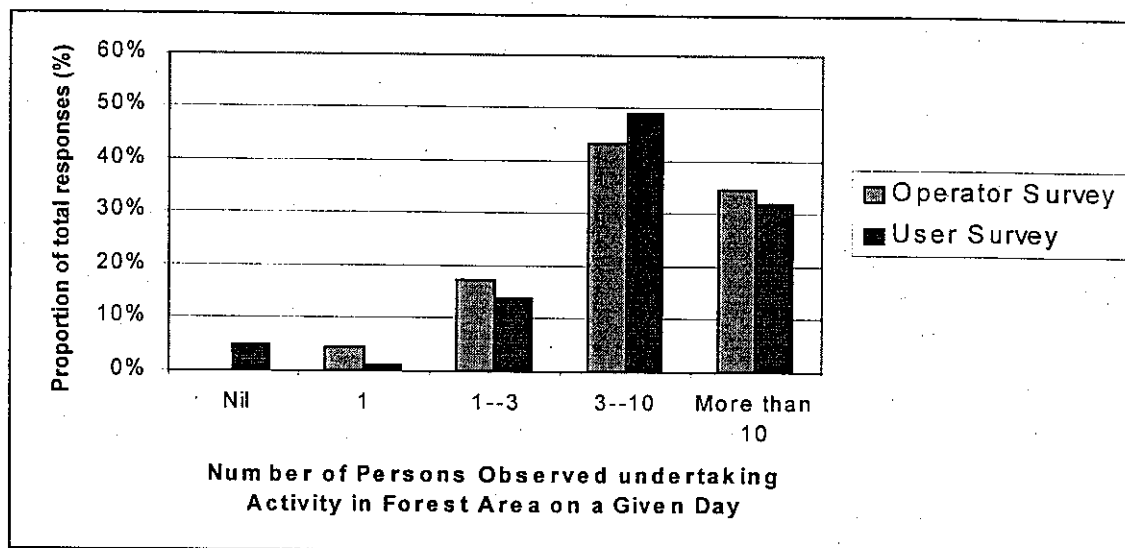
Degree of Participation in activities	Activities observed by	
	State Forest User Survey Respondents	Commercial Tourism and Recreation Operator Survey
Most popular activities observed	Camping Four wheel driving Bushwalking Trail bike riding Fishing Horse riding Mountain bike riding	Bushwalking Mountain bike riding Trail bike riding Horse riding Four wheel driving
Less popular activities observed	Orienteering Running Rally driving Bowhunting	Orienteering Running Bowhunting Rally driving Camping Fishing

There is a fair degree of consistency in the activities nominated by users of forests and commercial tour operators. Other less common activities observed by recreational users of state forests included photography, swimming, climbing, canyoning, caving, picnicing, bird watching, canoeing, wood gathering, dog walking, rogaining, abseiling, hangliding, illegal activities, water based activities, two-wheel driving, sled dog racing and exploring historical sites.

These results support the information supplied by SFNSW personnel with regards the most popular activities undertaken in State forests in the southern region. Obviously, the activities that respondents observe others undertaking will be influenced to a degree by the activity that the survey respondent undertakes. This is because some activities occur in specific locations within the forest, so that four wheel drive enthusiasts, for example, will be more likely to see other four wheel drive enthusiasts as they are using common roads and trails.

Within each survey, respondents were also asked to indicate the number of persons they observed using the State forest on any given day. Figure 5a shows the responses from each survey for the number of persons observed undertaking activities in forests on any given day.

FIGURE 5A NUMBER OF PERSONS SEEN UNDERTAKING ACTIVITIES IN STATE FORESTS ON ANY GIVEN DAY



Note: within the user survey, an additional response category was provided; 'nil'.

Therefore, the most common number of persons seen undertaking activities within the State forest on a given day was three to ten. At least seventy percent of respondents from both surveys indicated observing greater than three people within the State forest during their forest visit.

5.3.3 Conclusions on Activities Undertaken in Parks and Forests

In comparing the activities undertaken in national parks and State forests, it is noted that there are several activities that are popular under both forms of tenure. These include bushwalking, picnicing, camping, sightseeing, fishing and four wheel driving. As discussed in section four of this report, defining what activities are permissible under each form of tenure is dependent upon site-specific characteristics related to each park and forest. A discussion of those activities that may potentially be impacted under the negotiated outcome is provided in sections seven and eight of this report.

5.4 ATTRIBUTES SOUGHT BY VISITORS TO STATE FORESTS

Information was collected on the attributes sought by users and potential users of State forests in order to provide an understanding of the natural settings that users desire when undertaking activities in forests. To increase the economic and social benefits attributable to sustainable forest based tourism and recreation, these attributes need to be understood, particularly in the event of a change in tenure from State forest to national park.

Two approaches were adopted to gauge an understanding of the attributes sought by visitors to State forests in the study area:

- commercial tourism and recreation operators were asked to nominate the attributes they sought when taking tourists into the forest areas; and
- user survey respondents were asked to indicate the attributes of State forests they desired.

Commercial operators were asked as part of the survey to list those state forest key sites and things of interest that they visited during their trips to forest areas³². Figure 5b shows the key attributes that are favoured by commercial tourism and recreation operators.

FIGURE 5B ATTRIBUTES OF STATE FORESTS SOUGHT BY COMMERCIAL TOURISM AND RECREATION OPERATORS

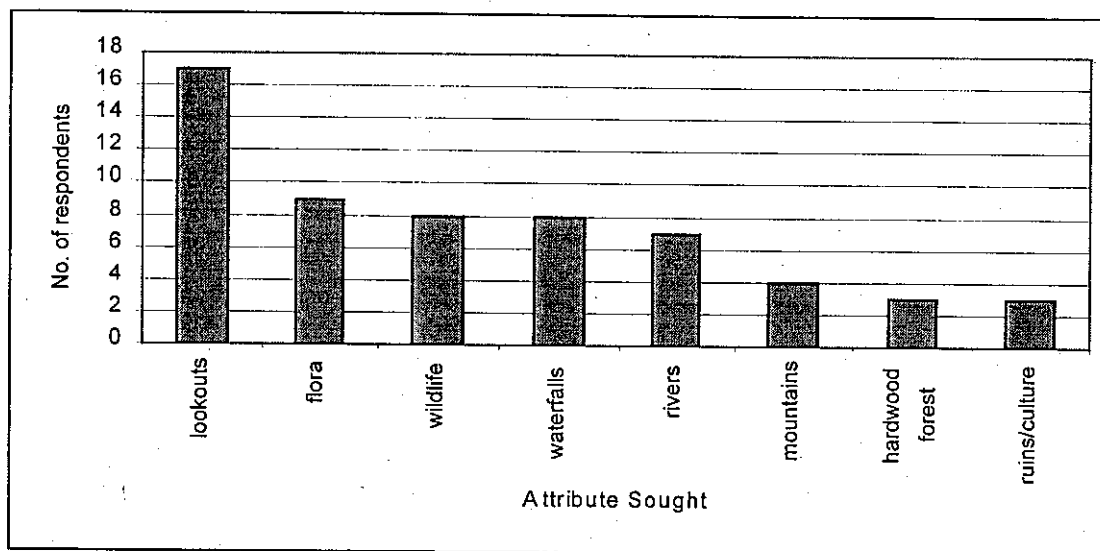


Figure 5b reveals that lookouts are easily the most sought after attribute within State forests, from a commercial operator perspective. Enjoying the flora and wildlife were also key attributes sought. Other attributes not listed in figure 5b that respondents listed as being sites of interest included rainforests, quiet streams, picnic areas, natural bush, geology based sites, discovery trails and downhill fire trails/vehicle free roads.

State forests within the southern region that were specifically listed as containing some of the attributes mentioned above were:

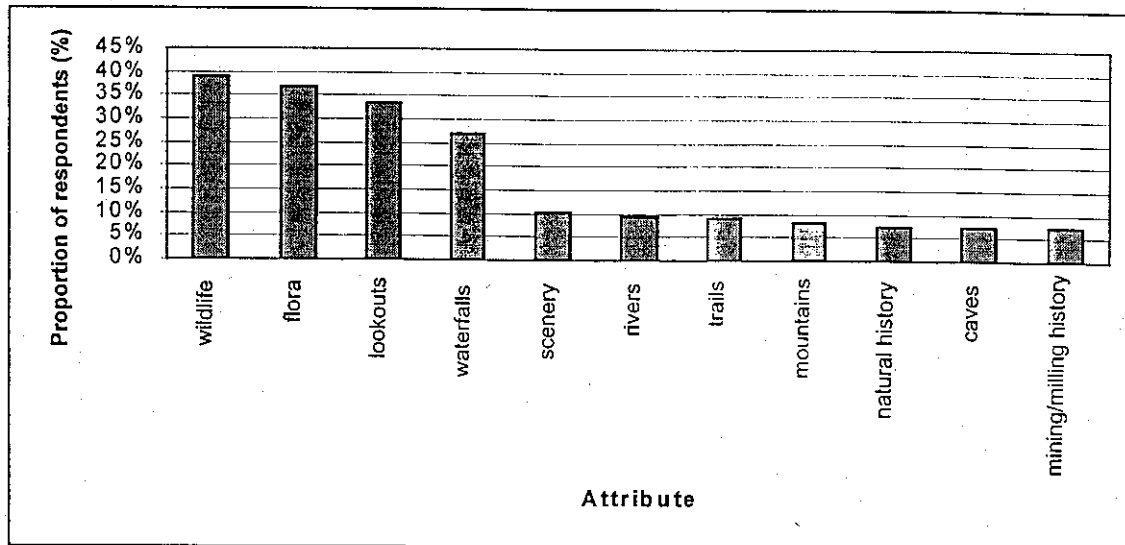
- coastal sub-region: Currumbene, Kiola, Shallow Crossing, Clyde, Termeil, Benandarah, South Brooman, North Brooman, Buckenbowra, Yerriyong, Flat Rock, Yadboro, Dampier, McDonald;
- western sub-region: Micalong, Bondo; and
- northern sub-region: Jenolan.

There were many more commercial operators who did not list specific State forests but stated that key sites were located across all State forests within the southern region. Furthermore, the perceived bias to State forests in the coastal sub-region in the above listings reflects the number of forests in this sub-region, the number of tourism operators there and the size of the State forest based tourism industry in this sub-region relative to other sub-regions.

Figure 5c reveals the attributes sought by users of State forests according to the results of the State forest user survey undertaken as part of this study.

³² Given commercial operators are taking other tourists into forest areas, the operators are acting as the mechanism by which use of the State forest occurs. Therefore, commercial operators form part of both the supply side and demand side profile of park and forest based recreation and tourism.

FIGURE 5C ATTRIBUTES SOUGHT BY USERS OF STATE FORESTS



As can be seen, there is a high degree of correlation between the attributes sought by commercial tourism and recreation operators and users of State forests. Wildlife, flora, waterfalls and lookouts are the most common attributes sought by each group.

In addition to those attributes shown in figure 5d, forest users also listed the following attributes as (less common) attributes sought within forests:

- tracks and trails
- traditional cattle routes
- beaches
- lakes
- rainforests
- alpine vegetation
- picnic areas
- tunnels
- ruins
- wilderness areas
- native forests.

5.5 CHARACTERISTICS OF VISITS TO STATE FORESTS

Through the State forest user survey, information was collected on a number of characteristics for visits to forest areas within the region. This information provides insights into the profile of forest based tourism and recreation within the southern region. Key characteristics included:

- the majority of survey respondents live outside of the southern CRA region;
- private car was by far the most common mode of transport used to reach the state forest area;
- on average, it took three hours to reach the State forest from the home of the survey respondent. Travel times, did however, vary widely with the shortest journey taking 15 minutes and the longest 16 hours;
- the average number of visits made to the State forest over a 12 month period was three. The maximum number of visits recorded was 80 and the minimum one;
- the average amount of time spent in the state forest varied by reason for visiting (activity undertaken). However, across all survey respondents the average recorded was 1.5 days; and
- on average, survey respondents typically had 10 persons in their party when they visited the State forest.

These results are a function of the survey sample that was used for the State forest user survey. The sample included representatives from both regional and metropolitan (New South Wales and Australian Capital Territory) clubs and organisations that use State forest land to undertake activities, as well as individuals (both regional and metropolitan) who use forested lands, though not as part of an organised club or association. The majority of survey respondents undertook activity within forest areas as part of an organised club or association rather than with friends, peers or alone³³. This means that the typical number of people in a party that visits a forest is estimated to be high, relative to if individuals formed a majority of survey respondents.

5.6 ORIGIN OF VISITORS TO STATE FORESTS IN THE SOUTHERN CRA REGION

The origin of visitors to forest and park areas in the southern region is important, as this will influence the type of visitation undertaken. Whereas local residents who visit forests generally undertake day trips, visitors from outside of the southern region will tend to incorporate overnight stays within the region as part of their forest or park visit. This has implications for the expenditure associated with forest and park visitation, as expenditure per visit will vary according to the type of visitor undertaking the trip (overnight visitors will generally spend more than day trippers). This is discussed in greater detail in section six of this report.

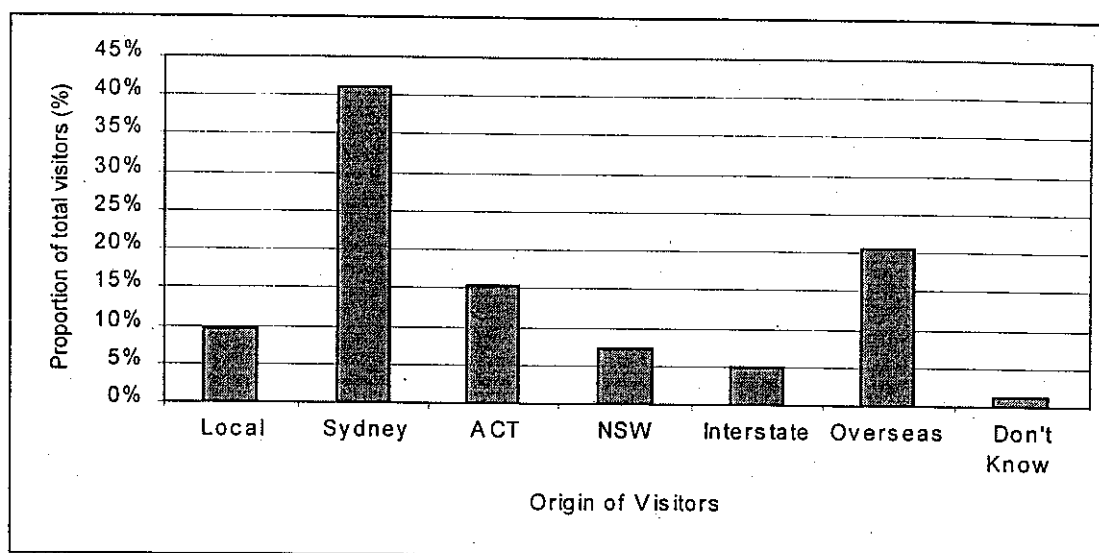
To develop a profile of the origin of visitors to State forests within the region, two approaches were adopted:

- commercial tourism and recreation industry operators were asked to apportion total client visitor numbers across different categories of origin; and
- user survey respondents were asked to nominate whether they resided within or outside the study region.

³³ Those who undertook activity as part of an organised club or association can also undertake activities alone or with friends or family in a 'non-organised' state.

Figure 5d shows the origin of visitors who undertake State forest activities with commercial tourism and recreation operators.

FIGURE 5D ORIGIN OF STATE FOREST VISITORS UNDERTAKING VISITS WITH COMMERCIAL TOURISM AND RECREATION OPERATORS



Therefore, visitors to the southern region that undertake State forest based activities with commercial operators are predominantly from Sydney. Other important origin segments include those from overseas and the Australian Capital Territory. Local residents account for only ten percent of commercial operator clientele.

Commercial operators were also asked as part of the survey the proportion of visitors from different areas that came to the southern region with their particular trip as the main purpose of their visit. This allowed insights to be gained into the proportion of visitors that visit the region with particular State forest based activities as the main purpose for the visit rather than visiting the region for another main purpose and undertaking a State forest based trip whilst there. Table 5i lists the results derived with regards this issue.

TABLE 5I PROPORTION OF COMMERCIAL OPERATOR CLIENTS THAT UNDERTAKE VISIT TO THE AREA WITH THE STATE FOREST VISIT AS THE MAIN PURPOSE OF THEIR TRIP

Origin of Visitors	Proportion that undertake visit to the area with state forest based activity as the main purpose of their trip	Proportion that undertake visit to the area for another reason and undertake a state forest based trip whilst there
Sydney/NSW	82%	18%
ACT	83%	17%
Interstate	52%	48%
Overseas	50%	50%

Therefore, visitors from New South Wales to the southern region who undertake forest based activities with commercial operators are likely to visit the region for the specific purpose of undertaking this activity³⁴. The estimates provided seem to be quite high and do not necessarily

³⁴ These findings are based on responses provided by commercial tourism and recreation operators.

hold true for visitors to forest areas who undertake their visit of their own accord rather than with a commercial operator.

The majority of respondents to the user survey lived outside the study region. This outcome influenced the average distance travelled to reach the State forest (see Section 5.5)³⁵. The high proportion of visitors that come to State forests in the southern region from outside of the study region demonstrates the importance of visitors from areas such as Sydney and the Australian Capital Territory to the profile of park and forest based tourism and recreation in the study area. Both Sydney and Canberra provide large population bases that are in close proximity to natural areas within the southern region.

Therefore, based on survey results provided by commercial operators and State forest users, it is assumed that a majority of State forest visitors in the southern region are from outside of the region. This issue is discussed in more detail in section six of this report, as it influences the proportion of visitors to forests that are classified as tourists relative to recreational visitors.

5.7 VISITATION TO ABORIGINAL AND CULTURAL SITES IN STATE FORESTS

Both commercial operators and forest users provided information on whether or not they incorporate visits to sites of Aboriginal/cultural significance during their visit to State forest areas. Based on survey responses, table 5j lists the proportion of each category that visit such sites.

TABLE 5J VISITATION TO SITES OF ABORIGINAL/CULTURAL HERITAGE

Survey	Proportion that visit Aboriginal/Cultural Sites
Commercial Operator	43%
Forest User	25%

Therefore, commercial operators are more likely to take clients to sites of Aboriginal/cultural heritage than general forest users. However, the majority of aggregate State forest users do not visit Aboriginal/cultural sites during visits to forests.

State forests that were listed by those who visited Aboriginal and cultural sites included Mogo, Buckenbowra, Kiola, Termeil, Yadbora, Belanglo, Flat Rock, Bodalla, Newnes, Wandella, Ourimbah, Bendethera, Dampier, Micalong and Bondo. Sites of significance are also found in other State forest areas including alpine and sub-alpine regions and other forests that were not specifically named.

5.8 INFLUENCE OF SEASONALITY ON PARK AND FOREST VISITATION

Seasonal influence on visitation to national parks and State forests was gauged in two ways:

- asking NPWS and SFNSW staff to indicate seasonal influences on visitation; and
- surveying state forest users via the user survey to determine seasonal influences.

³⁵ Average distance travelled was larger than it would have been if more local residents formed part of the survey sample.

A brief discussion of the influence of seasonality on visitation under each form of tenure is provided below.

5.8.1 National Parks

The influence of seasonality on visitation to national parks within the southern region was quite variable. NPWS personnel indicated that seasonal impacts did not have an influence on the visitor profile in 18 of the 45 national parks within the region. However, for the remaining parks, seasonality was deemed to have an influence. The main influences, by sub-region, are:

- in the coastal sub-region, for those national parks whose visitation is influenced by seasonal conditions (19 out of a total of 32 national parks), visitation is dominant over the Summer period, and to a lesser extent during Spring;
- visitation within the western tablelands sub-region is dominated by Kosciuszko National Park. Visitation to this park tends to peak in Winter and Summer³⁶. The influence of winter means that in some nature reserves in this region, visitation is restricted over this period; and
- within the northern tablelands sub-region, seasonality is recognised as an influence on visitation in three out of the six parks. Visitation in these three parks tends to be highest during school holiday periods, especially over Autumn and Spring.

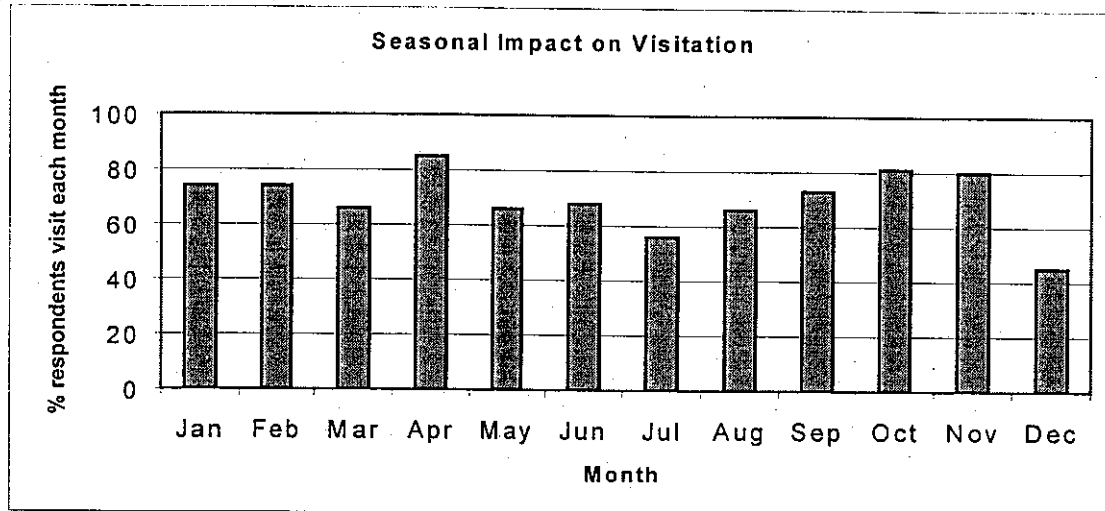
5.8.2 State Forests

Data collected from SFNSW personnel on the influence of seasonality on the visitation profile indicated that:

- in the coastal sub-region, the profile of visitation varies over the year for some specific characteristics of the visitation profile. More family groups visit forests over summer, less firewood collection occurs over summer, sled dog training is undertaken during winter and visitation associated with mushrooming occurs mainly in March;
- in the western tablelands sub-region, visitation is restricted over winter due to wet weather, poor road access associated with this weather, and snow; and
- within the northern tablelands sub-region, the only observed influence of seasonality on the visitation profile is that there are more visitors during Autumn and Spring when mushrooms are in greater abundance.

State forest user survey respondents also indicated the impact of seasonality on their individual visitation patterns. Figure 5e shows the seasonal impact on visitation to State forests in the southern CRA region. The proportion of survey respondents that visit forests in each month is shown.

³⁶ Recall that winter-based visitation has been excised for the purposes of this study.

FIGURE 5E SEASONAL INFLUENCE ON STATE FOREST VISITATION

As can be seen, visitation to State forests peaks in April and October and is lowest in December. Periods of higher visitation correspond to holiday periods (January, February, Easter and Spring). Relatively lower visitation across winter reflects, in part, restrictions on use due to unfavourable weather conditions.

5.9 RESTRICTIONS THAT IMPEDE USAGE OF PARKS AND FORESTS

As part of the State forest user survey, respondents were asked to list any current restrictions that impede the use of State forest areas. Responses that were provided listed a series of restrictions that users considered were an impediment to their use of not only State forests, but also national parks.

There was a relatively even split between respondents when asked to consider if they deemed their use of natural areas was impeded in any way. Forty four percent of respondents indicated that they did believe restrictions impeded their use, whilst the remaining 56% indicated that they did not consider their usage was impeded by restrictions.

The following section provides a listing of the main restrictions/impediments noted by users. Restrictions are not directly linked to particular areas, but rather are presented as generic issues across all parks and forests in the southern region. The degree to which issues are deemed restrictions to use is often influenced by individual perceptions. The authors make no attempt to justify perceived restrictions, instead those that were identified by survey respondents are listed.

Restrictions and impediments to tourism and recreational use within national parks and State forests in the southern region include:

Restrictions on Access

- the most common restriction on use cited by users is restrictions on access to specific areas, particularly within national parks;
- some users feel that closures within national parks are often indiscriminate;
- restricted access in parks and forests is manifested mainly via locked gates and the closure of trails and tracks;

- other access restrictions occur where access to State forests is limited when the surrounding land is private property and/or national park;
- restrictions to access also exist where logging areas are components of the management of a State forest area; and
- access restrictions exist where logs are placed across tracks in State forests. A consequence of this is that it prevents users from camping near lakes or beaches.

Restrictions related to Facilities

- some users claim that lack of facilities in some areas also restrict usage; and
- facilities that were specifically noted include toilets, water tanks and camping areas;

Restrictions Related to Forest Management

- some users allege that SFNSW are not undertaking as much maintenance on tracks, fire trails and bridges within State forests due to the fact that the 'threat' exists that the tenure of this land may change to national parks, and more specifically, wilderness areas;
- fallen trees within forest areas that are not cleared can easily restrict passage for vehicles on tracks and trails;
- many users pointed out that drains on State forest fire trails restrict the carriage of horse floats and trucks, impeding the ability of such vehicles to reach drop-off points;
- in a similar vein, it is claimed that mounds built over walking trails at the beginning of walks restrict access to such tracks for elderly and less mobile persons; and
- interestingly, some users state that grading roads in State forests increases the accessibility of these areas to everyone.

Restrictions Related to Tenure Change

- the need to obtain a permit to undertake activities in national parks (for activities) that do not require a permit under State forest tenure was noted to be a restriction on usage of national parks;
- many users noted that the declaration of wilderness areas are restricting usage of public lands;
- it is also argued that this is leading to decreased visitation to natural areas both now and will continue to do so in the future; and
- some users claim that they are losing access to historic trails and historical and pioneering items of interest due to tenure changes.

Restrictions Related to Particular Activities

- it is claimed that the fee for undertaking orienteering on forested land is excessive and results in most orienteering being undertaken on private land.

Restrictions Related to Seasonal Closures

- many users point out that seasonal restrictions related to rain or fire also impede upon use, however, the need for such restrictions are understood and accepted by users; and

- in some cases, users point out that there is a lack of readily available information on track conditions and rain related closures.

Restrictions Related to Miscellaneous Issues

- there is a perception amongst some users that limitations and restrictions on usage lead to the use and abuse of the natural environment;
- other users say that there should be some recognition that users provide a service within natural areas by cleaning fire trails of fallen trees and reporting damage and problems to relevant authorities;
- therefore, restricting access to certain areas results in this service being jeopardised; and
- some users are happy to see access restrictions put in place so that responsible user groups manage these natural areas.

5.10 RECENT AND FUTURE TRENDS IN ACTIVITIES AND OPPORTUNITIES IN PARKS AND FORESTS

Understanding the future developments that will influence the demand side profile of tourism and recreation in national parks and State forests requires an analysis of recent and future trends in key attributes of the profile, including:

- visitation levels;
- activities undertaken; and
- attributes sought by users and potential users.

In addition, changes within the supply side profile will also influence the development of the demand side profile.

In terms of visitation, this section provided an overview of the historical and forecast future visitation levels associated with national parks and State forests within the region. These estimates show that visitation is forecast to continue to increase over the next few years. Factors that will influence the degree to which such forecasts are met include:

- international and domestic visitation levels;
- population growth rates in regional and metropolitan centres both within and in close proximity to the southern region; and
- changes in what is sought by visitors from a nature based experience (reflected via activities and attributes).

Trends in activities will heavily influence the future opportunities within the park and forest based tourism and recreation industry. The emergence in recent years of visitation segments devoted to ecotourism and adventure sports are two examples of recent trends in activities undertaken within parks and forests. These activities generally attract specialised groups, and in the case of adventure sports, require specialised equipment. Another activity that has evolved over the last two decades has been the emergence of four-wheel driving (and associated elements of tours, tag-a-longs and driver training) as an important activity in parks and forests.

An indicator of future trends in activities is provided by examining the expansion plans of commercial forest based tourism and recreation businesses. Activities which such businesses have indicated they are going to expand into over the next three years include trailbike riding, orienteering, fly fishing, canoeing, kayaking, bushwalking, mountain biking and horse riding and horse trekking. Expansion into these activities indicates that commercial operators believe they can service a growing market in these sectors.

Attributes sought by visitors to parks and forests within the region will be both a product of and a determining factor in the activities undertaken. With increasing urbanisation along the eastern seaboard of Australia and greater work and other pressures within everyday life, the value attributed by people to their leisure time will increase. This has the potential to increase the attraction of escaping urban centres to places of environmental value (that is, parks and forests). Greater demand for attributes such as clean, quiet and natural environments will lead to a higher value being placed on these attributes by users and potential users.

Future opportunities for tourism and recreation within national parks and State forests in the southern region will be a product of these changes in activities undertaken and attributes sought. Future opportunities in the study area will also be influenced by the following factors:

- the region is characterised by abundant tracts of national park and State forest, particularly in the coastal sub-region. These sites are generally within close proximity to each other and to the population centres that supply visitors to them;
- whilst the supply of land in the region presents diverse opportunities for visitors, what will be a limiting factor to future opportunities within the region will be capital. The level of capital that is provided for investment in recreation and forest based activities is reflected via such things as the level of facilities provided in parks and forests. This report has shown that, particularly in national parks, it is anticipated that State agency expenditure will decline over the next few years. To maintain existing commitments, any decline in expenditure has to be made up for via an offsetting increase in other areas (such as expenditure by commercial operators), revenue increases or via a re-focussing of investment priorities;
- by developing linkages with existing industries within the southern region, further opportunities and growth can be achieved by the park and forest based tourism and recreation industry. Two valuable existing industries within the region are those based around beaches and snow. Each of these industries traditionally attracts large and diverse visitor profiles. By continually developing packaged visitor opportunities that combine beach and park/forest visitation in the coastal sub-region and snow and park/forest visitation in the tablelands, the visitor base and associated expenditure derived from park and forest tourism and recreation will expand; and
- given the proximity of the southern region to the population centres of Sydney-Canberra-Melbourne, there continually exists the opportunity to increase visitation to the region. The proximity of the region to Sydney and Canberra mean that it is in a strong position to continue to increase the share of the domestic short-break holiday market. In addition, the traffic routes linking these centres are some of the major continental links within Australia. Infrastructure already exists along these routes to support visitor movements, so development expenditure to facilitate visitation to the southern region from these population centres is not significant.

To some extent, the management and policy guidelines adopted for national park and State forest settings will also influence the opportunities and trends in activities undertaken over time. For instance, restrictions exist upon some activities within national parks, for example, horse riding. Therefore, opportunities related to this activity over time will depend upon decisions made with regarding tenure change.

5.11 DEMAND SIDE PROFILE SUMMARY

Key points associated with the demand side profile of national park and State forest based tourism and recreation in the southern CRA region include:

- visitation associated with national parks in the region is estimated at 3.45 million per annum;
- visitation associated with State forests in the region is estimated at 500 000 per annum;
- the coastal sub-region is the most important of the three sub-regions that comprise the southern CRA region;
- the most popular activities undertaken in national parks include bushwalking, camping, fishing, swimming, sightseeing, picnicing and four-wheel driving;
- the most popular activities undertaken in State forests include picnicing, bushwalking, camping, horse riding, four-wheel driving, scenic driving, fishing, trail bike riding and mountain bike riding;
- as can be seen, there are numerous activities that are undertaken under both forms of land tenure;
- the most common attributes of forests sought by users are lookouts, flora, wildlife and waterfalls;
- the majority of State forest users in the region live outside of the study area, highlighting the importance of population centres such as Sydney and Canberra to the park and forest based tourism and recreation industry;
- a minority of forest users incorporate a visit to sites of Aboriginal/cultural importance during their State forest visit;
- visitation to many parks and forests in the southern region is influenced by seasonal conditions, with school holiday periods, Autumn and Spring being the most popular times to visit;
- less than fifty percent of forest users believe their usage of natural areas is restricted, however, those that do believe their usage is restricted cite restrictions related to access, facilities, forest management, tenure change and seasonal closure as amongst the factors that result in impeded use of natural areas; and
- analysing recent and future trends in visitation, activities and attributes allow future opportunities within the park and forest based tourism and recreation profile to be gauged.

6. ECONOMIC VALUE OF VISITATION TO PARKS AND FORESTS

6.1 INTRODUCTION

The purpose of this section is to analyse the economic benefit derived from national park and State forest based tourism and recreation within the southern CRA region. Estimating the economic value of park and forest based tourism and recreation is a key component of the regional tourism and recreation profile. This value can be estimated by:

- Calculating the consumers' surplus associated with visitation to national parks and State forests; and/or
- Determining the expenditure associated with national park and State forest visitation.

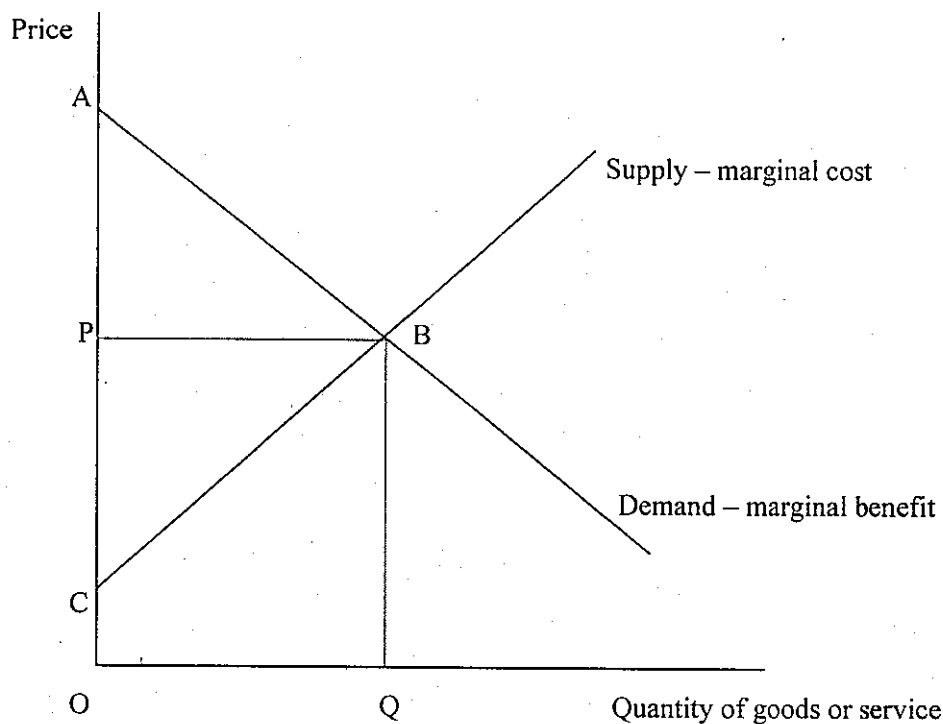
Both of these methods are adopted in the following section in an attempt to estimate the economic value of tourism and recreation in parks and forests in the southern region.

6.2 CONSUMER SURPLUS AND PRODUCER SURPLUS

The economic value of park and forest based tourism is most effectively measured by utilising the concept of producer and consumer surplus. Consumers' surplus is the economic benefit to consumers reflected by their marginal willingness to pay for a good or service, net of the price consumers actually have to pay for the good or service. Producers' surplus is the economic benefit to producers reflected by the price/revenue for the product or service net of the cost related to the marginal opportunity cost of supply. The economic benefit or value of a good or service is measured by the summation of producer and consumer surpluses (Gillespie, 1998).

The concept of producer and consumer surplus is illustrated with the aid of figure 6a. Within this figure, the supply curve indicates the quantity of a good or service supplied at varying prices and the marginal cost of producing more of the good or service. The demand curve indicates the maximum amount that consumers are willing to pay for incremental increases in the quantity of good or service (Gillespie, 1998).

FIGURE 6A GENERAL SUPPLY AND DEMAND MODEL



Source: RACAC (1996)

In figure 6a, producers' surplus is represented by the area between the supply curve (marginal opportunity cost curve) and the price (revenue earned by the producer). This equates to $PBOQ$ less $CBQO$ yielding the area PBC as the measure of producer surplus. Consumers' surplus is measured by the area under the demand curve and above the price line, i.e. $ABQO$ less $PBOQ$, yielding ABP as the consumers' surplus (Gillespie, 1998).

Unlike most goods and services in the economy, recreation and tourism to natural areas are considered to be non-market goods³⁷. Non-market goods do not have a demand curve that is readily identifiable from market transactions between buyers and sellers. In order to estimate a demand curve, revealed preferences must be used. The travel cost method is a common technique that can be adopted to derive a demand curve for non-market goods such as recreation and tourism.

The travel cost method is a valuation method in which travel costs are used to impute a demand curve for recreational benefits. The method assumes that the willingness to pay for recreation at a particular site can be inferred from the cost of travel by visitors to the site.

To apply the method, an on-site survey is undertaken to ascertain the distances travelled, the cost of travel (including the implicit value of time), details of each visiting group and other socio-economic information. Population statistics are obtained for different zones of trip origin, and visitation rates by zone are calculated. A regression equation is derived showing the relationship between visitation rates and travel costs. This equation is then used to stimulate the effect of hypothetical entry charges to derive a demand curve for recreation at the site. The area under the demand curve and above the actual price line gives an estimation of the consumers' surplus (James and Gillespie, 1997).

³⁷ This excludes that component of nature based tourism and recreation offered by commercial operators.

The supply curve associated with non-market goods and services such as tourism and recreation in natural areas can be derived by examining the suppliers of the good or service, in this case the NPWS and SFNSW. In the case of tourism and recreation opportunities, managers of forested lands do not derive any producers' surplus. This is due to the fact that only part of the marginal production costs associated with providing the resource are offset (via nominal entry fees, etc) (Gillespie, 1998). Commercial operators will be able to derive some measure of producer surplus, however, Buultjens et al (1998) acknowledge that this will be influenced by competition and other factors that might serve to reduce competition.

6.3 ESTIMATING CONSUMER SURPLUS ASSOCIATED WITH PARK AND FOREST VISITATION IN THE SOUTHERN REGION

To estimate the consumers' surplus associated with park and forest based tourism and recreation in the southern region, estimates of consumers' surplus per visit to natural areas are combined with estimates of visitation to national parks and State forests in the region. Visitation estimates for national parks and state forests were outlined in section five of this report.

A travel cost study was not undertaken as part of this study to determine consumers' surplus associated with visitation to natural areas in the southern region. Rather, other travel cost studies relevant to the study area are drawn upon to estimate consumers' surplus associated with park and forest based tourism and recreation. Table 6a lists consumers' surplus estimates derived and/or used as part of other economic studies.

TABLE 6A SUMMARY OF OTHER TRAVEL COST STUDIES

Study Area	Author	Consumers' Surplus Estimate
Eurobodalla National Park	Lockwood and Lindberg (1996)	\$4.80 to \$19 per visit (\$1996)
South East Forests	RAC (1992)	\$8.90 per visitor (\$1992)
Gibraltar Range National Park ¹	Bennett (1995)	\$19 per visit (\$1995)
Dorrigo National Park ²	Bennett (1995)	\$34 per visit (\$1995)
Minnamurra Rainforest Centre, Budderoo National Park	Gillespie (1997)	\$28 to \$48 per visit (\$1996)

Source: Gillespie (1998)

Note:

1. Average stay is almost 2 days

2. Average stay is half a day.

Table 6a lists a series of estimates of consumers' surplus for visits to natural areas. Gillespie (1998) discussed the difficulties associated with directly comparing estimates from different studies. Difficulties arise due to the fact that variations in the application of the travel cost methodology can result in variations in the estimate of consumers' surplus. Such variations can arise as a result of:

- whether the zonal or individual travel cost method is used;
- the specification of the recreation quantity variable;
- the specification and quantification of travel costs including the treatment of the value of time;
- how the travel cost method deals with intervening recreational opportunities; and
- the selection of the functional form of regression equations (Gillespie, 1998).

Given these considerations, it is assumed that for the purposes of this study the estimates derived by Lockwood and Lindberg (1996) are most appropriate. This reflects the fact that their

study was based on a national park that is within the southern region and a range of estimates is provided.

Table 6b estimates the consumers' surplus associated with park and forest based tourism and recreation in the southern region. Consumers' surplus estimates per visit provided by Lockwood and Lindberg (1996) are adjusted for inflation.

TABLE 6B CONSUMERS' SUPPLUS ASSOCIATED WITH PARK AND FOREST VISITATION IN THE SOUTHERN CRA REGION

	Visit Numbers	Consumers' Surplus	Total Consumers' Surplus (\$millions)
National Parks	3,450,000	\$5.07 to \$20.06	\$17.5 to \$69.2
State Forests	500,000	\$5.07 to \$20.06	\$2.5 to \$10.0
TOTAL	3,950,000	\$5.07 to \$20.06	\$20.0 to \$79.2

1. National Park visitation does not include visitation to Kosciuszko National Park over the six-month winter period. It is assumed that 70% of visitors to Kosciuszko National Park visit the park over this period (NPWS regional staff, pers. comm., September 1999).

Therefore, consumers' surplus associated with national park visitation in the southern region is estimated to be between \$17.5 and \$69.2 million per annum. Consumers' surplus associated with State forest visitation within the region is estimated to be between \$2.5 and \$10.0 million per annum.

Appendix 6a provides estimates of consumers' surplus for visits to national parks and State forests within each sub-region of the southern CRA region.

6.4 ESTIMATING EXPENDITURE ASSOCIATED WITH PARK AND FOREST VISITATION IN THE SOUTHERN CRA REGION

6.4.1 Introduction

In addition to estimating the economic value of nature based tourism and recreation by using the consumers' surplus method, the expenditure/revenue approach provides an alternative measure of value which is of relevance to regional economic impact analysis. Estimated expenditure derived under this approach is provided to CARE Pty Ltd for their purposes in deriving indirect (flow-on) impacts as part of the regional economic impact assessment work undertaken for the CRA region.

Whereas the previous method was based upon consumers' and producers' surplus, the revenue/expenditure approach is based on the concept of output, with the expenditure of a consumer on a good or service being equivalent to the revenue received by a producer for providing the product. In figure 6a, this value of output is equivalent to the area OPBQ. However, the expenditure of visitors to the forested areas is equivalent to OCBQ, rather than the concept of output (OPBQ). This is because the expenditure of the visitor is more akin to the production costs of the supplier. This is due to the fact that the visitor essentially acts as a producer of the visit, assembling all the components of the visit (site, travel method, time, accommodation, etc). Given the visitor also consumes the product they produce, there is no producer surplus associated with this visit (Gillespie, 1998).

Care must be taken when comparing the expenditure estimated in this study with expenditure estimates associated with other forest uses (e.g. apiary and grazing). Other uses will tend to follow the traditional revenue/expenditure approach where a producer sells a product to a consumer, thereby realising some form of producer surplus, unlike the tourism and recreation study where no producer surplus is realised (Gillespie, 1998).

Expenditure by visitors to forested lands is estimated using a similar approach as developed by Gillespie (1998) and Buultjens et al (1998). That is, two alternative methods are adopted:

- Site-specific expenditure studies are used to estimate expenditure by visitors to State forests and national parks³⁸; and
- Expenditure estimates for different types of visitors (international tourists, domestic tourists and domestic recreational visitors) are used to estimate total expenditure by visitors to national parks and State forests within the region.

The following section outlines each of these approaches.

6.4.2 Approach One: Site-Specific Expenditure

Expenditure data associated with visitors to natural areas was collected as part of the user survey undertaken during this study. However, the expenditure data that was collected was not considered to be a sufficient dataset to facilitate estimates of disaggregated expenditure associated with visitation to the southern region. This was due in large part to the fact that the survey was not designed primarily as an expenditure survey.

As a result, a similar approach as was adopted in Gillespie (1998) is adopted in this study to estimate disaggregated expenditure data for visitors to natural areas. This approach draws upon data provided in studies undertaken by Powell and Chalmers (1995) on Dorrigo National Park and Gibraltar Range National Park. These studies examined expenditure patterns of visitors to forested lands.

Table 6c lists the disaggregated expenditure data provided in these two studies.

TABLE 6C DISAGGREGATED EXPENDITURE DATA PER FOREST VISIT, OTHER STUDIES

Item	Expenditure per Visit	
	Dorrigo National Park	Gibraltar Range National Park
Accommodation	\$6.03	\$5.63
Meals	\$5.10	\$4.45
Shopping	\$3.05	\$6.60
Fares	\$1.18	\$0.68
Car	\$4.67	\$7.35
Other	\$0.07	\$0.42
TOTAL	\$20.10	\$25.13

Source: Powell & Chalmers (1995)

The greater the region that is defined (in terms of area) in an expenditure study, the greater will be the level of expenditure by visitors to that region. For the Dorrigo study, the region was defined as that part of the Bellingen LGA above the escarpment. The region defined for the Gibraltar Range study included the LGA's of Nymoida, Severn, Glen Innes and Grafton. The

³⁸ This approach does not distinguish between tourism and recreation visitation.

sizes of the LGA's in the southern CRA region vary between the size of the regions in these two studies. Thus, the above estimates are considered reasonable for the southern region.³⁹

After adjusting the values in table 6c for inflation, the range of estimated expenditure per visit for the southern region is estimated to be \$21.22 to \$26.53.

Table 6d lists the estimates of total expenditure associated with national park and State forest visitation in the southern region⁴⁰.

TABLE 6D ESTIMATED VISITOR EXPENDITURE ASSOCIATED WITH PARK AND FOREST VISITATION IN THE SOUTHERN REGION

	Visitor Numbers	Expenditure per Visit	Total Expenditure (\$ millions)
National Parks	3,450,000	\$21.22 to \$26.53	\$73.2 to \$91.5
State Forests	500,000	\$21.22 to \$26.53	\$10.6 to \$13.3
TOTAL	3,950,000	\$21.22 to \$26.53	\$83.8 to \$104.8

Therefore, it is estimated that under the adopted approach visitors to national parks have total expenditure between \$73.2 and \$91.5 million per annum. In addition, visitors to State forests within the region have total expenditure between \$10.6 and \$13.3 million per annum⁴¹. Appendix 6b lists the total expenditure for national parks and State forests by sub-region based on sub-region visitation levels.

Table 6e lists the disaggregated total expenditure associated with national park and State forest visitation within the southern region.

TABLE 6E DISAGGREGATED TOTAL EXPENDITURE ASSOCIATED WITH PARK AND FOREST VISITATION IN THE SOUTHERN REGION

Expenditure Item	Lower Estimate (\$ millions)	Upper Estimate (\$ millions)
Accommodation	25.1	23.5
Meals	21.3	18.6
Shopping	12.7	27.5
Fares	4.9	2.8
Car	19.5	30.6
Other	0.2	1.8
Total	83.8	104.8

³⁹ However, the accuracy of these estimates is limited as they do not differentiate between different types of visitors (for example recreational visitors on a day trip versus overnight domestic visitors).

⁴⁰ Estimates of expenditure per visit as derived for national parks are used as proxies for estimates of expenditure per visit to State forests.

⁴¹ Estimates of expenditure per visit are for visits to one park or forest only on a given trip. The approach adopted is unable to account for trips that involve visits to more than one park. In the southern region, especially the coastal sub-region, this may occur due to the number of parks and forests within close proximity to each other.

In interpreting these results, it must be remembered that the main deficiency of this approach (total visitation is not segmented into different types of visitors) is reflected within the resulting estimates. To overcome this problem, an alternative methodology is presented.

6.4.3 Approach Two: Differentiating Between Types of Visitors

The alternative approach to that presented above, recognises the different types of visitors to national parks and State forests and the differences in expenditure per visit associated with these different types of visitors. This allows the main deficiency of the above approach to be overcome, and therefore means that estimates derived under this approach are considered most accurate in terms of measuring expenditure associated with visitation.

For our purposes, visitors to parks and forests within the southern region are defined as being international tourists, domestic tourists or domestic recreational visitors. The expenditure per visit associated with each of these three categories is estimated to be:

- \$94 per visitor night for international tourists (based on average expenditure per visitor night in Australia, as listed in the 1998 International Visitor Survey as reported by Tourism NSW (1999));
- \$100 per visitor night for domestic tourists (based on average expenditure per visitor night in New South Wales, as listed in the 1998 National Visitor Survey (Bureau of Tourism Research, 1999c); and
- \$67 per day trip for domestic recreational visitors (based on average expenditure per day trip in New South Wales, as listed in the 1998 National Visitor Survey (Bureau of Tourism Research, 1999c).

It is assumed as part of this analysis that international and domestic tourists spend on average one night in the region associated with their visit to a national park or State forest and domestic recreational visitors visit the parks and forests within the region as part of a day trip.

The following section briefly outlines the assumptions used to derive estimates of international visitation to national parks and State forests in the southern region.

International Visitation

The number of international visitors to national parks in the southern region is estimated based on data from a number of different sources:

- in section three of this report, studies by Clare (1997) and Frank Small & Associates (1995) estimated the proportion of international visitation associated with total national park visitation at 5% and 7% respectively;
- Tourism NSW estimated international visitation to tourism regions within the southern CRA region at 293 000 in 1997. This estimate is adjusted to 135 000 once account is made for those parts of these tourism regions that are not completely included within the southern CRA region;
- therefore, international visitation to the southern region accounts for 4% of total visitation to regions within NSW;
- the International Visitor Survey: 1997 (Bureau of Tourism Research, 1999a) reveals that 34% of international visitors to Australia visit a national park during their stay; and

- adjusting this to account for some of the "icon" national parks in the southern CRA region, including Blue Mountains, Kosciuszko, Morton and Deua, it is estimated that visitation to national parks amongst international tourists is 50% within the southern CRA region.

Therefore, it is estimated that 70 000 international visitors visit national parks within the southern region. This accounts for 2% of total national park visitation. It is assumed that international visitation accounts for a similar proportion of total visitation within State forests. This equates to an estimated 10 000 visitors per annum.

Domestic Visitation: Tourism and Recreation

Unlike international visitors, domestic visitors are classed as visiting natural areas either as a tourist or as a recreational visitor. For the purposes of this study, tourists are defined as staying overnight within the region as part of their visit to the park or forest. Recreational users are defined as day-trippers and are deemed to include local residents of the area in which the visit is undertaken.

Other studies that have commented upon the mix of visitors to natural areas include:

- Ward (1998), as referred to by Buultjens et al (1998), found that 50% of visitors to a group of Queensland national parks were from an area that had the same postcode as the area in which the park was situated; and
- Hamilton-Smith (1998) found that for visits to Tasmanian state forests and national parks, between 64 and 71 percent of visitors were from the area in which the natural area was located.

The commercial tourism and recreation operator survey undertaken as part of this study revealed that only 10% of people who undertook organised nature-based activities with local businesses were locals. Other visitors were from Sydney, Australian Capital Territory, other parts of New South Wales, interstate and overseas. In addition, the State forest user survey undertaken as part of this study revealed that 30% of visitors to State forests in the southern region were from the region itself. In comparison to other studies, this estimate is low.

Given the particular characteristics of the study region (proximity to the population centres of Sydney and Canberra, wide area of coverage), it is estimated that 60% of domestic visitors to State forests and national parks in the southern region are categorised as domestic tourists with 40% categorised as recreational users⁴².

Table 6f summarises the profile of visitation to national parks and State forests by visitor type.

TABLE 6F PROFILE OF VISITATION BY VISITOR TYPE

Type of Visitor	National Park	State Forest
International Tourists	70 000	10 000
Domestic Tourists	2 028 000	294 000
Domestic Recreationists	1 352 000	196 000
TOTAL	3 450 000	500 000

Account must also be made for the fact that whilst undertaking visits to national parks and State forests, not all of the expenditure associated with the visit will be directly linked to the visit to

⁴² This estimate accounts for a large degree of visitation that is derived from Sydney and the Australian Capital Territory and also accounts for intra-region visitation undertaken by local residents when they visit other parts of the southern CRA region.

the park or forest. For many visitors, a visit to a park or forest (whether as a day trip or overnight visit) will incorporate other activities such as a visit to a beach.

The commercial tourism and recreation operator survey undertaken as part of this study revealed that only 28% of operators who offered activities in State forests offered these activities as dedicated trips. Results from the State forest user survey undertaken as part of this study reveal that only 38% of visitors to State forests indicated that the visit was always the main purpose of their trip.

Based on this information, it is assumed that between 20% and 33% of expenditure incurred by visitors to national parks and State forests in the region is directly related to the visit to the park or forest component of their trip. These estimates will form low and high estimates for the purpose of estimating total expenditure.

Expenditure Associated with Visitation

Table 6g presents the estimated expenditure associated with national park visitation in the southern CRA region.

TABLE 6G ESTIMATED VISITOR EXPENDITURE ASSOCIATED WITH NATIONAL PARK VISITATION IN THE SOUTHERN CRA REGION

Type of Visitor	Visit Numbers	Expenditure per Visit	Expenditure directly related to national parks (%)		Total Expenditure (\$ millions)	
			Low	High	Low	High
International Tourists	70 000	\$94	20%	33%	\$1.3	\$2.2
Domestic Tourists	2 028 000	\$100	20%	33%	\$40.6	\$66.9
Domestic Recreationists	1 352 000	\$67	20%	33%	\$18.1	\$29.9
TOTAL	3 450 000				\$60.0	\$99.0

Therefore, expenditure directly related to national park visitation in the southern region is estimated to be between \$60 and \$99 million per annum. Appendix 6c provides estimated expenditure by sub-region.

Table 6h presents the estimated expenditure associated with State forest visitation in the southern CRA region.

TABLE 6H ESTIMATED VISITOR EXPENDITURE ASSOCIATED WITH STATE FOREST VISITATION IN THE SOUTHERN CRA REGION

Type of Visitor	Visit Numbers	Expenditure per Visit	Expenditure directly related to state forests (%)		Total Expenditure (\$ millions)	
			Low	High	Low	High
International Tourists	10 000	\$94	20%	33%	\$0.2	\$0.3
Domestic Tourists	294 000	\$100	20%	33%	\$5.9	\$9.7
Domestic Recreationists	196 000	\$67	20%	33%	\$2.6	\$4.3
TOTAL	500 000				\$8.7	\$14.3

Therefore, estimated expenditure directly related to State forest visitation in the southern CRA region is estimated to be between \$8.7 and \$14.3 million per annum. Appendix 6d provides estimated expenditure by sub-region.

Employment Associated with Visitation

Employment associated with NPWS, SFNSW and commercial tourism and recreation operators was outlined in section four of this report. In effect, this employment is generated by virtue of the fact that visitors spend the dollars estimated above during visits to national parks and State forests within the region.

In addition, visitor expenditure will generate indirect impacts on regional employment. The regional economic impact assessment work being undertaken as part of the southern region CRA will provide estimates of direct and indirect employment associated with tourism and recreation. As these estimates are not available at the time of writing this draft report, an estimate of the likely nature of these employment impacts is provided.

Powell and Chalmers (1995) and Gillespie (1997) undertook regional economic impact studies that estimated the number of direct and indirect jobs associated with visitation to national parks. It was estimated that per 10 000 visits, between 4 and 7 direct and indirect jobs were created. Based on the expenditure estimates above, this equates to between 1 380 and 2 415 jobs associated with national park visitation and between 200 and 350 jobs associated with State forest visitation⁴³.

Conclusions

The expenditure data derived using the second approach is similar to estimated expenditure under the first approach. However, the increased sophistication of the second approach in segregating total visitation into different types of visitors with different expenditures per visit, means that these estimates are used for deriving flow-on impacts in the regional economic impact assessment study. The expenditure and employment data for State agencies (suppliers) and commercial operators provided in section four of this report is also used in the regional economic impact work.

6.5 FUTURE TRENDS IN CONSUMERS' SURPLUS, EXPENDITURE AND EMPLOYMENT

Using the forecast future visitation levels associated with national parks and State forests (as discussed in section five), projected trends in consumers' surplus, expenditure and employment can be made. Table 6i provides estimated future values associated with national park visitation.

TABLE 6i ESTIMATED TRENDS IN CONSUMERS' SURPLUS, EXPENDITURE AND EMPLOYMENT ASSOCIATED WITH NATIONAL PARK VISITATION

Year	Visitor Numbers (millions)	Consumers' Surplus (\$ millions)		Expenditure (\$millions)		Employment	
		Low	High	Low	High	Low	High
1998-99	3.45	17.5	69.2	\$60.0	\$99.0	1 380	2 415
1999-00	3.53	17.9	70.8	\$61.4	\$101.3	1 412	2 471
2000-01	3.61	18.3	72.4	\$62.8	\$103.6	1 444	2 527
2001-02	3.69	18.7	74.0	\$64.2	\$105.9	1 476	2 583
2002-03	3.77	19.1	75.6	\$65.6	\$108.2	1 508	2 639
2003-04	3.86	19.6	77.4	\$67.1	\$110.8	1 544	2 702
2004-05	3.94	20.0	79.0	\$68.5	\$113.0	1 576	2 758
2005-06	4.03	20.4	80.8	\$70.1	\$115.6	1 612	2 821
2006-07	4.12	20.9	82.6	\$71.6	\$118.2	1 648	2 884
2007-08	4.21	21.3	84.5	\$73.2	\$120.8	1 684	2 947

⁴³ These employment estimates reflect both direct and indirect employment and therefore include direct commercial tourism and recreation industry employment and indirect associated industries employment.

Table 6j provides estimated future values associated with State forest visitation.

TABLE 6J ESTIMATED TRENDS IN CONSUMERS' SURPLUS, EXPENDITURE AND EMPLOYMENT ASSOCIATED WITH STATE FOREST VISITATION

Year	Visitor Numbers ('000s)	Consumers' Surplus (\$ millions)		Expenditure (\$ millions)		Employment	
		Low	High	Low	High	Low	High
1998-99	500	2.5	10.0	\$8.7	\$14.3	200	350
1999-00	511	2.6	10.3	\$8.9	\$14.7	204	358
2000-01	523	2.7	10.5	\$9.1	\$15.0	209	366
2001-02	535	2.7	10.7	\$9.3	\$15.4	214	375
2002-03	547	2.8	11.0	\$9.5	\$15.7	219	383
2003-04	559	2.8	11.2	\$9.7	\$16.0	224	391
2004-05	571	2.9	11.5	\$9.9	\$16.4	228	400
2005-06	584	3.0	11.7	\$10.2	\$16.8	234	409
2006-07	597	3.0	12.0	\$10.4	\$17.1	239	418
2007-08	611	3.1	12.3	\$10.6	\$17.5	244	428

7. IMPACT ASSESSMENT IN RELATION TO CHANGES IN LAND TENURE

7.1 INTRODUCTION

The purpose of this section is to provide an assessment of the impacts associated with the negotiated outcome. The assessment includes a description of the impact of the negotiated outcome on:

- National Parks and Wildlife Service;
- State Forests of NSW;
- commercial national park and State forest based tourism and recreation operators; and
- users and potential users of parks and forests in the southern region.

The central feature of an impact assessment of the negotiated outcome is to estimate the impacts of a change in land tenure from State forest to national park on the profile of forest and park based tourism and recreation in the southern region. The assessment sought to provide as much region-specific information as possible, with impacts described in terms of their effects within different sub-regions of the southern CRA region. Both qualitative and quantitative means are adopted to illustrate potential impacts arising from a change in land tenure.

Likely impacts upon State agencies will include changes to the area being managed by NPWS and SFNSW, with flow-on impacts on expenditure and employment associated with the tourism and recreation component of each agency. Commercial operators will be impacted both from a supply side point of view (as suppliers of tours that utilise park and forest resources) as well as from a demand side point of view (as users of parks and forests in the region).

Impacts upon users and potential users of parks and forests will include changes to the activities that are permissible on land directly affected by tenure change and the associated variations in the demand profile that will accompany these changes. Changes to the profile are described in terms of the opportunities, both positive and negative, that arise following a tenure change.

As the negotiated outcome is to be formulated by stakeholders following the submission of this draft report, a detailed assessment of likely impacts arising from the outcome will be included within the final report.

8. MANAGEMENT OBJECTIVES TO MAXIMISE ECONOMIC AND SOCIAL BENEFITS

8.1 INTRODUCTION

The purpose of this section is to provide suggested management options for the region, with a focus on increasing the economic and social benefits attributable to sustainable forest based tourism and recreation opportunities. These options are directly linked to the profiling and trend information supplied as part of the demand and supply side analysis presented in section four and five of this report.

The development of specific management options is dependent on site-specific characteristics as well as land use configurations and the negotiated outcome (which will influence tenure change). At the time of writing the negotiated outcome had not been developed. Consequently the options listed in this chapter are generic in nature.

The management options included aim to:

- maximise environmentally sustainable economic and social benefits; and
- mitigate any negative economic and social impacts associated with the implementation of the negotiated outcome.

To achieve this, the options are intended to:

- increase the number of visitors to natural areas in the region;
- increase visitors' length of stay;
- increase visitor expenditure/ the yield per visitor;
- maintain a range of visitor opportunities throughout the region's parks and forests; and
- increase visitor satisfaction thus providing personal benefits and encouraging repeat visitation and word-of-mouth promotion.

8.2 POTENTIAL IMPACTS OF TENURE CHANGE ON VISITATION

The potential social and economic impacts of a change in land tenure from State forest to national park, depend upon:

- the current level of visitation;
- the current profile of State forest and national park visitors;
- the type of activities undertaken at a particular location;
- the number and distribution of other parks and forests;
- the range and location of new and alternative nature-based tourism and recreation opportunities;
- the type, extent and quality of other regional attractions;
- the prescriptions of any future national park management plan(s); and
- transitional management arrangements.

Potential impacts associated with a change in land tenure from State forest to national park include:

- an increase in visitors attracted by the 'status' of a national park or by the opportunities provided therein;
- a change in the profile of visitors attracted to the area resulting in a change in needs, expectations and spending patterns; and
- the displacement of current visitor groups who are attracted to State forests for high impact activities.

8.3 ACTIVITIES SUSCEPTIBLE TO TENURE CHANGE

For many visitors to natural areas, the tenure of the land is irrelevant. They are able to undertake their chosen activity in their chosen setting, without concern about the legislative status of the land or the relevant land management agency. For others, the designation of a natural area as State forest or national park changes their perception of their experience, although the activity undertaken may be identical. However, there are also activities that are susceptible to tenure change because of the differing purposes of reservation and management policies and objectives.

Section 8A of the *Forestry Act 1916* provides the basis for the management of sustainable tourism and recreation in State forests. It charges State Forests of NSW with the responsibility for promoting and encouraging the use of forests for recreation, and preserving and enhancing the quality of the environment.

Section 32F of the Act requires a Special Purposes Permit for 'prescribed activities'. The *Forestry Regulation 1994* lists prescribed activities as 'tourist agent safaris', tours, trials, rallies, competitions, organised youth and adventure activities, organised recreation, civil or religious activities, professional and technical excursions and selling or hiring out goods, services or equipment.

Other than the requirement for permits, and general regulations related to fire, camping, firearms and protection of vegetation and forest infrastructure, there are few restrictions on activities in State forests. Most forests have free, multiple entry access and most roads and tracks in State forests are open to the public.

As outlined in section five, the most popular activities undertaken in State forests are:

- bushwalking
- camping
- picnicing
- scenic driving
- horse riding
- four wheel driving
- cycling/mountain bike riding
- trail bike riding
- fishing

The direction for sustainable tourism and recreation in the *National Parks and Wildlife Act 1974* is contained in Section 72. This section states that a plan of management must be prepared for each national park or reserve. Such a management plan must have regard for the conservation and preservation of wildlife and its habitat, the conservation and preservation of relics, historic structures and special features of the protected area, the encouragement and regulation of the 'appropriate use', understanding and enjoyment of each park or reserve by the public, and the 'appropriate use' by any lessee, licensee or occupant. The debate over what constitutes appropriate use is ongoing.

Leases and licences for tourism 'trades, business and occupations' are issued under Sections 151, 152 and 47GC of the Act, depending on the reservation category. The National Parks and Wildlife Service currently licenses about 60 commercial operators in the region roughly covered by the southern CRA.

Non-commercial group activities also require a consent under Clause 19 of the *National Parks and Wildlife (Land Management) Regulation 1995*. That regulation also contains clauses related to littering and damage, prohibition of animals in parks, camping in designated areas, use of vehicles, vessels and horses only on roads, tracks and trails set aside for that purpose, the protection of animals, vegetation, sites and other features and fires and firearms.

On the whole, the most popular activities in national parks are very similar to those in State forests:

- bushwalking
- fishing
- water based activities (including swimming)
- camping
- picnicing
- sightseeing
- four-wheel driving

Despite the similarities between State forest and national park activities, there are a number of activities that may be impacted upon should there be a change in land tenure governing that land where such activities are undertaken. The susceptibility of certain activities stems from differing legislative requirements, and differing policies and operational frameworks of the land management agencies. Activities likely to be impacted upon include:

- camping, especially dispersed camping outside designated areas
- horse riding
- four wheel driving
- cycling/mountain bike riding
- dog walking
- trail bike riding
- rallying, competitions and endurance/ adventure sports
- orienteering
- miscellaneous occupancies such as pistol clubs and rifle ranges.

Except for dog walking, these activities are not automatically excluded from national parks. Whether they are an 'appropriate use' depends primarily on the conservation priorities of the park, specific location and potential impacts on the environment. This is generally determined as part of the management planning process.

As a generalisation national parks have more controlled access than State forests. Again, as a result of conservation priorities, as well as the need to balance potential conflicts between users, issues about visitor safety or the need to protect road infrastructure during periods of heavy rain, some tracks become designated for specific activities, restricted to management vehicles only, or permanently, seasonally or temporarily closed.

Restrictions on access can have the direct effect of limiting activities. They can also have flow-on effects such as reducing opportunities for those unable or unwilling to walk.

The impact of changes in tenure on current and future commercial operators will depend upon the nature of the negotiated outcome. Both NPWS and State Forests of NSW currently issue one year licences, which are subject to fees and conditions. The NPWS is currently reviewing its tour operator licensing system with a view to providing a more efficient, practical, and equitable system that better manages and encourages appropriate use.

8.4 MANAGEMENT OPTIONS FOR CONSIDERATION

There are a broad range of management options which can help to optimise sustainable tourism and recreation potential to natural areas and mitigate any adverse social or economic impacts associated with changes in land tenure. These can be grouped as follows:

- i. access
- ii. infrastructure development
- iii. information and interpretation
- iv. marketing
- v. industry facilitation

Access

Access is fundamental to tourism and recreation activity. Management options can relate to the extent, type and quality of roads and tracks, as well as the facilitation of travel and transport linkages. They include:

- maintenance or expansion of four-wheel driving opportunities;
- upgrading of tracks to provide further two-wheel driving opportunities;
- creation or maintenance of walking tracks of varying lengths and degrees of difficulty;
- designation/ separation of tracks for horseriders, cyclists and walkers;
- grading of tracks and provision of rails and ramps to facilitate access by the less able;
- maintenance or expansion of entry and exit points for river-based activities such as rafting;
- identification of areas appropriate for adventure activities such as canyoning;
- identification of new nodes/ routes for activities (potentially) displaced by proposed changes in tenure;
- creation of touring routes to link popular locations and icons with less well known destinations;
- provision of adequate signposting to facilitate movement throughout the region;
- encouragement of coach/ minibus stop-overs at new or established destinations; and
- linking of destinations and park/forest based visitor programs with public transport routes and schedules.

Infrastructure development

Tourism and recreation opportunities in natural areas range from highly self-reliant activities that require little or no infrastructure to activities that require a more developed setting. Management options consequently include:

- provision of additional basic facilities for camping and/or day visits such as picnic tables, fireplaces, toilets;
- provision of basic infrastructure to enhance access to and appreciation of the environment such as graded walking tracks, boardwalks and lookouts; and
- provision of more extensive/capital intensive infrastructure such as interpretative centres, information centres, merchandising outlets and cafes.

Information and interpretation

Information and interpretation are important for each stage of the 'trip cycle'. They can help increase awareness, appreciation, understanding and satisfaction, thus meeting the educational imperatives of land management agencies and improving the visitor experience. Management options include:

- development of pre-visit regional and site-specific information/guides/manuals for independent visitors and commercial operators;
- development of annotated regional or sub-regional maps that focus on nature-based opportunities;

- distribution of information through land management agencies, regional and local tourism centres, commercial tour operators, accommodation venues and other appropriate outlets;
- development of on-site interpretative trails, signs, displays;
- development of audio based trails;
- development of major destinational facilities such as visitor centres;
- provision of face-to-face interpretative programs and activities;
- development of post-visit information/merchandising which reinforces interpretative messages and provides a 'take-home' reminder; and
- facilitation of educational workshops for local tourism industry personnel to inform them of changes associated with tenure change and potential new visitor opportunities.

Marketing

Marketing includes market research, product development, pricing strategies and promotion. Marketing is an important tool for managing demand thus helping to ensure sustainability. Management options include:

- undertaking further market research to understand visitor needs and expectations thus enabling land managers to provide appropriate facilities and services;
- participation in regional promotional campaigns;
- development of collateral material for distribution through regional visitor information centres, trade and consumer shows and other appropriate outlets;
- development of a pricing strategy for park entry, camping and other services which does not discourage potential visitors; and
- utilisation of positive media opportunities.

Industry facilitation

Communication and ongoing liaison between land management agencies and the tourism and recreation industries is essential to ensure sustainability and to optimise potential. Management options include:

- ensuring regular communication and liaison with industry through meetings, workshops, newsletters, internet services etc;
- development of co-operative arrangements between land management agencies to reduce costs and 'red-tape' for industry;
- identification of potential commercial opportunities for licensing or tendering;
- provision of tangible benefits to industry such as interpretative material, co-operative marketing opportunities and endorsements;
- joint arrangements between park and forest visitor programs with the private sector; and
- encouragement of negotiations between local Aboriginal communities and the tourism industry regarding the development of cultural tourism.

8.5 SELECTION OF APPROPRIATE MANAGEMENT OPTIONS

Which management options are ultimately appropriate for any given park or forest site will depend upon a thorough assessment of issues related to factors such as:

- the general conservation values of the site;
- the need to protect specific plants, animals, landscape features, historic sites, relics, aboriginal heritage;
- the potential to manage and mitigate negative environmental impacts;
- the interest and involvement of the local community and other stakeholders;
- the intrinsic appeal of the location;
- site characteristics such as topography, aspect, soil structure and drainage;
- the current and potential level of visitation;
- the needs and expectations of current and potential visitors;
- the spending patterns of current and potential visitors;
- the displacement of existing users/activities;
- the opportunity for displaced activities to be undertaken elsewhere in the region;
- the existence of competitive visitor facilities and services both in natural areas and on private land;
- the existence of compatible visitor facilities and services both in natural areas and on private land; and
- potential linkages and economies of scale.

Where the management options require the investment of large amounts of capital, a thorough impact assessment, market feasibility analysis and cost-benefit analysis should be undertaken.

9. OPERATIONAL INDICATORS FOR MONITORING

9.1 INTRODUCTION

The purpose of this section is to provide information to the Ecologically Sustainable Forest Management (ESFM) group that will assist in the development of operational indicators for monitoring sustainable forest based tourism and recreation opportunities. This information has been developed in accordance with Montreal Process Criteria for sustainable forest management and State/Commonwealth protocols for the CRA/RFA process.

9.2 PURPOSE AND CHARACTERISTICS OF PERFORMANCE INDICATORS

Performance measurement has two equally important purposes – accountability and development. Accountability refers to *proving* efficiency and effectiveness against stated objectives. Land management agencies must be accountable to the State central agencies in relation to State policies, priorities and budgets, to the Federal government in relation to national programs and funding and the general community in relation to the expenditure of public money and the achievement of positive social, economic and environmental outcomes.

Development refers to *improving* efficiency and effectiveness. This is particularly important to land management agencies at a time when public sector funding is under increasing pressure and the community is becoming increasingly discerning and demanding. To achieve continuous improvement, regular monitoring of inputs, process, outputs and outcomes is required. A comprehensive and integrated performance indicator system provides the mechanism to achieve this.

The Victorian Department of Treasury and Finance (1996) lists the desirable characteristics of performance measures. That is, they:

- reduce performance to a quantifiable unit of measure;
- measure performance using at least one of the following criteria;
 - quantity
 - quality
 - timeliness
 - cost
- never use quantity in isolation - in most cases more than one measure should be used for the one output;

- are relevant, realistic and simple;
- assist in decision making;
- provide information for internal and external reporting; and
- provide a basis for establishing targets.

Oakes (1986) as cited in Wyatt (1994) argues that indicators must provide at least one of the following:

- information that describes performance in achieving desirable conditions and outcomes - the indicator is thus linked to the goals of the system and provides a benchmark for measuring progress;
- information about features known through research to be linked to desired outcomes; such indicators have a predictive value because when they change, other changes can be expected to follow;
- information that describes central features of a system in order to understand how a system works;
- information that is problem-oriented; and
- information that is policy relevant: indicators should describe conditions of particular concern to policy makers and be amenable to change by policy decisions.

Indicators are part of a performance measurement system that also includes establishing targets and benchmarking. Targets and benchmarks allow agencies to better assess their own performance and learn from others. *'Benchmarking provides the conceptual framework to integrate best practice and performance indicators into a vital quality assurance system'* (Wyatt, 1994). Indicators that can best be used for benchmarking/comparisons over time are generally expressed as ratios or percentages. For example:

- maintenance expenditure per visitor or per hectare;
- maintenance expenditure: capital improved value;
- return on investment;
- occupancy;
- percentage of energy from renewable sources;
- percentage decrease in solid waste; and
- percentage of satisfied customers.

However, indicators that require qualitative responses are valid and useful, particularly in areas where processes or outcomes are difficult or expensive to quantify.

The Tourism Optimisation Management Model, developed in 1996 by Manidis Roberts Consultants for Kangaroo Island and the South Australian Tourism Commission, proposes an indicator framework to monitor and quantify the key economic, marketing, environmental, socio-cultural and experiential benefits and impacts of tourism activity. (McArthur, 1997).

For each component (economic, marketing, environmental, socio-cultural and experiential), the model defines:

- optimal conditions;
- indicators of those conditions;
- an acceptable range for each indicator;
- a monitoring method and details for each indicator;
- areas of responsibility; and
- a timeframe for the collection and review of the data.

The model also proposes a process for action if the indicator data fall outside the acceptable range. This involves exploring cause-and-effect relationships, identifying indicator results requiring responses from land management agencies, the tourism industry, local government or elsewhere, identifying indicator results that were out of anyone's control and, where necessary and appropriate, developing options for action and improvement and revising targets and agreements.

In summary, the following questions provide a useful guide for determining the relevance and appropriateness of performance indicators:

- will the selected indicator lead to the collection of appropriate, valid and reliable data?
- is the raw data able to be collected, analysed and interpreted at an appropriate scale?
- is the indicator feasible in terms of the time, costs and expertise required for data collection and reporting?
- are the indicators able to be used for decision-making?
- will the indicators be readily understood by broad audiences?
- is a target or acceptable range able to be established for each indicator?
- does the indicator measure enduring features that can be compared across time?
- are they able to be used for benchmarking?
- does the use of the performance indicator lead to an over-emphasis on 'getting the right figures' at the risk of a negative impact on overall performance? (Oakes, 1986 as cited in Wyatt, 1994 and Treasury and Finance, 1996).

9.3 THE MONTREAL PROCESS

Considerable work has already been undertaken at a national and international level on the development of performance indicators related to forest management. In September 1993, Canada convened an International Seminar of Experts on Sustainable Development of Boreal and Temperate Forests. This seminar focussed specifically on the development of criteria and indicators (C&I) for the conservation and sustainable management of forests and began what is now called the Montreal Process.

This initiative led to the formation of the Montreal Process Working Group, with representatives from twelve countries including Australia. The Montreal Process Working Group was established with the specific purpose of developing and implementing internationally agreed criteria and indicators. At the sixth meeting of the Group in Santiago Chile, in February 1995, the member countries endorsed a statement of political commitment known as the "Santiago Declaration", including a comprehensive framework of seven criteria and 67 indicators.

The seven criteria describe the broad forest values that society seeks to maintain, while indicators provide measures of change in these criteria over time. The criteria agreed by the Montreal Process are:

- Criterion 1 Conservation of biological diversity
- Criterion 2 Maintenance of productive capacity of forest ecosystems
- Criterion 3 Maintenance of ecosystem health and vitality
- Criterion 4 Conservation and maintenance of soil and water resources
- Criterion 5 Maintenance of forest contribution to global carbon cycles
- Criterion 6 Maintenance and enhancement of long term multiple socio-economic benefits to meet the needs of societies
- Criterion 7 Legal, institutional and economic framework for forest conservation and sustainable management

It is Criterion 6 that contains indicators relevant to this study. Table 9a lists these indicators.

TABLE 9A INDICATORS RELATED TO TOURISM AND RECREATION

Sub-section	Indicators
6.2 Recreation and tourism	a. Area and percent of forest land managed for general recreation and tourism, in relation to the total area of forestland;
	b. Number and type of facilities available for general recreation and tourism, in relation to population and forest area;
	c. Number of visitor days attributed to recreation and tourism, in relation to population and forest area;
6.3 Investment in the forest sector	Value of investment, including investment in forest growing, forest health and management, planted forests, wood processing, recreation and tourism.

Source: Montreal Process Working Group

The first report by countries against these indicators, the *First Approximation Report*, was presented at the Eleventh World Forestry Congress in Antalya, Turkey in October 1997.

In July 1996 the Ministerial Council on Forestry, Fisheries and Aquaculture agreed to endorse the use of the Montreal Process C&I in the Regional Forest Agreement (RFA) process. It was agreed that a framework of regional indicators based on the Montreal Process indicators be developed for use in the RFA process.

The Montreal Process Implementation Group for Australia (MIG), a Commonwealth-State body chaired by the Department of Primary Industries and Energy, was given prime responsibility for coordinating progress on domestic implementation of the international C&I and developing the framework of regional indicators. The MIG process included two major stakeholder meetings, a series of seminars, expert workshops and a public comment period and resulted in the document *A framework of regional (sub-national) level criteria and indicators of sustainable forest management in Australia*. The framework of regional indicators was released in August 1998. Principles recognised in the development and implementation of the indicators include: the precautionary principle, inter-generational equity, public participation, transparency and access to information, international good citizenship, user pays, and industry and regional development.

The regional framework provides regions with a guideline for a phased approach to the implementation of sustainability indicators. It also provides for the collection of information at a scale which can be aggregated to a national level in a transparent and credible way, for reporting against the Montreal Process C&I. However, while many of the indicators can be readily measured, others require further research, development, refinement and improvement.

The regional framework also recognises:

'that in implementing the indicators at a regional level there is a need to develop objectives, targets and standards in accordance with management requirements and objectives against which trends in indicators can be measured' and

'for each region, in accordance with RFA processes (where appropriate) and in consultation with stakeholders, it will be necessary to address each criterion and utilise a common sub-set of indicators for reporting, and to select additional indicators appropriate to management intent. Modification of some indicators may be necessary to address regional issues, match State legislative requirements etc. It will also be necessary to determine an appropriate timeframe for measuring and reporting, and negotiate responsibilities for collection of, and reporting on, data. This will be a fundamental factor in determining the cost of the arrangements.' (Commonwealth of Australia, 1998)

9.4 INDICATORS FROM THE REGIONAL FRAMEWORK

The regional framework includes five indicators relevant to tourism and recreation. The first four are modifications of the national/international indicators, while 6.3a remains unchanged from the national C&Is:

- 6.2.a Area and per cent of forest land available for general recreation and tourism;
- 6.2.b Number, range and use of recreation/tourism activities available in a given region;
- 6.2.c Number of visits per annum;
- 6.2.d Proportion of forest sites available for recreation and tourism which are impacted unacceptably by visitors; and
- 6.3.a Value of investment, including investment in forest growing, forest health and management, planted forests, wood processing, recreation and tourism.

Each of these indicators is briefly discussed below.

6.2.a Area and per cent of forest land available for general recreation and tourism

This indicator is intended to provide information on access for recreational and tourism uses of forests as well as a fairly coarse gauge of the extent to which forest management is providing for the recreational needs of the community. The intent of the indicator is important, as access is fundamental to tourism and recreation activity.

However, the indicator is a fairly crude measure of recreational accessibility/restriction as in principle, all public forested lands except some scientific reserves, cultural areas or where operations or conservation priorities preclude it, are available for general recreation and tourism.

The extent and type of access will vary according to tenure and management objectives, but most areas are still accessible/ available to some degree.

The indicator also does not satisfactorily assess whether community needs are being met, as the area of forest available for tourism and recreation does not reflect the degree that community needs can be satisfied. Demand is not related to total area but to particular landscapes, nodes and routes with desired attributes.

Data for this indicator could be supplied from agencies' GIS systems providing the datasets are available and compatible. During this study data was provided by SFNSW personnel on the percentage of land that is used for recreation and tourism for most state forests in the region. Data for privately owned forested areas would be less available.

In applying this indicator, an acceptable range should be determined and the need to temporarily and permanently restrict access to ensure sustainability should be acknowledged.

6.2.b Number, range and use of recreation/tourism activities available in a given region

This indicator is useful because it is intended to provide information on the variety and the number of activities for particular sites/settings. This combination of activity and setting provides a 'recreation opportunity'. Maintaining a diverse range of opportunities is crucial to providing for the varying needs and interests of the community and for optimising tourism and recreation potential.

However, there are an infinite range of activities and an enormous number of sites within the southern CRA region. The regional framework recommends beginning with a set of no more than 30 activities, with half of these representing variations on the core activities and keeping the range of sites to a manageable level. In the longer term the list of activities could be expanded and activities differentiated in terms of independent (recreation) and assisted (tourism) dimensions. The framework also indicates that it would be useful to compare available activities with community demands.

6.2.c Number of visits per annum

A strength of this indicator is that it is the most common form of recreation-related data collected by land management agencies and the tourism industry. However, the reliability of data for the southern CRA region varies considerably and is not available for all visitor locations or all forested land tenures. Most data is supplied as estimates; some are based on vehicle counters, track counters, registration books, camping permits, booking systems and licence allocations.

In implementing this indicator, standard methods for monitoring and reporting visitors' use of forested areas should be developed that take account of the duration of the visit as well as the number of visits, resulting in a measure of 'visitor days'.

The number of visits is a key variable in determining sustainability as well as economic impact. However, further indicators are required to obtain an accurate picture of both.

6.2.d Proportion of forest sites available for recreation and tourism which are impacted unacceptably by visitors

This indicator attempts to provide an integrated measure of sustainability and is an important first step in monitoring visitor impact. However, given the lack of environmental monitoring systems and programs, it requires a subjective assessment of what constitutes unacceptable impact. Consequently initial data is unlikely to be very robust.

Visitor impact is a function of the number of visitors, visitor behaviour, the nature and scale of their activity, the sensitivity and dynamics of the location, season and time, facility and infrastructure design and patterns and levels of management. More rigorous impact monitoring would take account of these variables. It would also specify more precise social and ecological indicators and place these in the context of management objectives for the site. (Stankey et al, 1985; Loomis and Graefe, 1992)).

6.3.a Value of investment, including investment in forest growing, forest health and management, planted forests, wood processing, recreation and tourism

The part of this indicator relevant to tourism and recreation provides an indication of the long-term and short-term commitment to forest management and the provision of visitor opportunities.

In reporting on this indicator it would be important to differentiate between capital investment and annual expenses/running costs and between the native forest and plantation sectors. Capital inflow should be reported separately.

Reporting this indicator in terms of investment per hectare or investment per visitor would allow better comparisons over time.

9.5 IMPLEMENTATION OF REGIONAL FRAMEWORK INDICATORS

Table 9b outlines the requirements to adequately report against these indicators.

TABLE 9B REQUIREMENTS FOR IMPLEMENTATION OF REGIONAL INDICATORS

Regional indicator	Requirements for implementation
6.2.a Area and per cent of forest land available for general recreation and tourism	<ul style="list-style-type: none"> - Agreement about what constitutes 'available land'. - Investigation of agency GIS systems for compatibility and completeness. - Definition of an acceptable range/ target.
6.2.b Number, range and use of recreation/tourism activities available in a given region	<ul style="list-style-type: none"> - Agreement about the (30) activities to be reported. These activities should represent the most popular activities but also include a number of 'minority' activities especially those which may be displaced by a change in tenure. Some activities such as bushwalking may need to be sub-divided to more accurately reflect the visitor opportunity provided, for example short, graded walk compared to extended, self-reliant wilderness walking. - Definition and inventory of sites/broadacre areas to be included. These should provide a representative sample of the various landscape classes in the Southern CRA. Region. Listing and mapping of these locations. - Decision about whether 'use' for each activity is to be reported qualitatively, for example high, medium or low level or quantitatively, that is number of participants. - Definition of a formula for providing a numerical representation of 'range'. - Definition of an acceptable range/target.

TABLE 9B (CONT.)

REQUIREMENTS FOR IMPLEMENTATION OF REGIONAL INDICATORS

Regional indicator	Requirements for implementation
6.2.c Number of visits per annum	<ul style="list-style-type: none"> - Definition and inventory of sites/broadacre areas to be included. - Agreement about acceptable methodologies for data collection as well as methods of data analysis, extrapolation, presentation and storage. Where possible this should be in line with the National Data Standards on Protected Areas Visitation from the ANZECC Benchmarking and Best Practice Program (NPS, 1996). - Definition of an acceptable range/target.
6.2.d Proportion of forest sites available for recreation and tourism which are impacted unacceptably by visitors	<ul style="list-style-type: none"> - Development of a sub-set of social and environmental indicators to assist in assessment of 'unacceptable impact'. - Definition of a 'site'. - Inventory of total available sites/broadacre areas. - Selection of sites/broadacre areas for monitoring (these should be the same as for indicator 6.2b). - Definition sampling instrument, that is qualitative survey of district managers or on-site field assessment. - Definition of an acceptable range/target.
6.3.a Value of investment, including investment in forest growing, forest health and management, planted forests, wood processing, recreation and tourism	<ul style="list-style-type: none"> - Standardisation of commercial accounting methodologies which separate capital and recurrent investment. - Agreement on proportional allocation of investment in facilities/ infrastructure that has more than one use, for example roads. - Definition of the spatial basis for reporting, for example CRA sub-regions, land tenures, IUCN categories, landscape classes, native/plantation forest. - Decision on whether to include investment by lessees, licensees as well as agencies. - Definition of an acceptable range/target.

9.6 ADDITIONAL INDICATORS

Indicators should therefore be developed for each objective of sustainable tourism and recreation in forests, that is:

- environmental sustainability
- social benefit
- economic benefit
- management efficiency

Indicators should also report on a mix of inputs, processes, outputs and outcomes to better guide management decisions.

In analysing the indicators from the regional framework, it is evident that they attempt to address each of the management objectives and that the indicators cover most stages of the management system. Table 9c summarises the coverage of indicators in the regional framework.

TABLE 9C COVERAGE OF INDICATORS IN THE REGIONAL FRAMEWORK

Indicator	Management objectives				Management stage/ type of indicator			
	Sustainability	Social benefit	Economic benefit	Management efficiency	Input	Process	Output	Outcome
6.2.a	*	*			✓			
6.3.b		*			✓		✓	
6.2.c	*		*				✓	
6.2.d	✓							✓
6.3.a		*		✓	✓			

Key:

✓ denotes the indicator address this objective.

* denotes that the indicator partly addresses this objective.

Table 9c shows that the indicators in the regional framework are quite varied in terms of their coverage when measured against management objectives and stages. However, additional indicators would provide a more complete picture. Additional indicators could include:

Percentage of visitors satisfied with their experience

This is an outcome indicator that provides a measure of social benefit. Satisfaction is a product of tangible elements such as physical convenience (access, signposting, toilets etc), the provision of practical and learning/interpretative information, the quality and quantity of recreational facilities and opportunities, and less tangible elements such as achievement of expectations, self fulfilment, communing with nature etc (Roger James, 1996). Consequently, it is a valuable but more expensive indicator to implement as it requires ongoing survey of forest visitors. Parks Victoria currently implements a visitor satisfaction monitoring program which provides a useful model.

Percentage of regional community satisfied with the range of opportunities provided

Visitor satisfaction only measures the social benefit provided to those who utilise the forests for recreation. It does not provide an indication of unmet demand. An assessment of the community's view of the appropriate range of opportunities would link with regional indicator 6.2.b and enable agencies to make more informed decisions about management options and facilities. It would also more directly monitor community concerns about equity, quality and diversity. Data for this indicator would need to be collected via survey, although costs could be kept to a minimum by incorporating one or two questions in regional omnibus surveys.

Number of tourism and recreation lessees and licensees in forested areas.

This is an output indicator of economic benefit. For completeness the number of leases could be reported by type of operation and land tenure or landscape class. The indicator would be relatively simple to implement.

Expenditure per visitor (per day)

This is also an output indicator of economic benefit. Like the visitor satisfaction indicator, it requires periodic survey but could be incorporated with other survey instruments. Expenditure per visitor could be extrapolated to produce a statement of regional economic contribution provided appropriate information/studies were also available on tourism multipliers.

Area of forest covered by tourism and recreation plans

This is a process indicator of sustainability. It would be relatively simple and inexpensive to report against.

9.7 PROFILE DATA AVAILABLE

In the course of this study data was collected on the following from the NPWS, SFNSW and commercial operator surveys:

- activities undertaken in national parks and State forests;
- facilities available in national parks and State forests;
- visitor estimates for national parks and State forests;
- seasonality impact on visitation in national parks and State forests;
- attributes sought by users within State forests;
- origin of visitors to State forests;
- proportion of State forest land used for tourism and recreation;
- expenditure and employment of NPWS and SFNSW directed towards tourism and recreation;
- period of time that commercial tourism operators have been in existence;
- future plans of commercial operators to offer activities over the next three years;
- whether other non-State forest activities are undertaken on the trip offered by commercial operators;
- whether commercial operators have business development/expansion plans in place for the next few years; and
- expenditure and employment of commercial operators.

In addition, data was collected from the user survey on:

- visitors by state forest;
- activities undertaken in State forests and national parks;
- attributes sought within natural areas;
- length of time to reach the State forest from home;
- length of stay in the State forest per visit;
- number of persons in visiting party;
- seasonal influence on visitation to State forests;

- type of visits (as part of an organised club/organisation or as individuals); and
- perceived restrictions on activities undertaken in national parks and State forests.

Much of this data, as well as the sampling instruments, would be a useful starting point in discussions about ongoing data collection methodologies and in the development of acceptable ranges and targets.

9.8 SUMMARY AND CONCLUSION

Performance indicators are required for accountability and to guide management decisions. Indicators should therefore be developed for each objective of sustainable tourism and recreation in forests, that is:

- environmental sustainability
- social benefit
- economic benefit
- management efficiency

Indicators should also report on a mix of inputs, processes, outputs and outcomes to better guide management decisions.

The regional indicator framework provides the basis for reporting on a regional or sub-regional level and also feeds into the national C&I process. However further indicators may be required to provide a more complete picture.

Developing and implementing indicators is a complex process. Consequently while validity and consistency are crucial, indicators may need to be implemented on a pilot basis and gradually expanded, revised and improved. Gradual implementation will also help in the management of budgets.

10. CONCLUSIONS

Consistent with the objectives of the project, this report has provided:

- quantitative and qualitative profiling information on the nature and size of the forest based tourism and recreation industry and its users in the southern CRA region;
- baseline and trend information on the tourism and recreation industry in the southern region;
- an assessment of the impact of changes in land tenure from State forest to national park on this profile *(to be included as part of the final report when the negotiated outcome has been agreed)*;
- suggested management objectives for the region, with a focus on increasing the economic and social benefits attributable to sustainable forest based tourism and recreation opportunities; and
- information to assist the Ecologically Sustainable Forest Management (ESFM) group in the development of operational indicators for monitoring.

Key results of the study include:

- general tourism and recreation are an important source of economic activity within the southern CRA region. In 1996-97, tourism and recreation contributed an estimated 5.9 million visits, 17.2 million visitor nights and \$1.2 billion in expenditure to the regional economy;
- State agencies manage 45 national parks and 82 State forests across the three sub-regions of the study area. Permissible tourism and recreation activities differ according to the form of tenure governing landuse and site-specific considerations;
- national parks and State forests attract all lifecycle groups and socio-economic backgrounds. Visitors wish to spend time in unspoiled, natural Australian environments;
- the park and forest based commercial tourism and recreation industry is dominated by small-scale businesses. The industry provides an important contribution to the supply side of nature based tourism and recreation in the region;
- Aboriginal and cultural sites protected on forested lands have the potential to support additional indigenous tourism and recreation operators;
- an estimated 3.5 million visitors visited national parks and 500 000 visitors visited State forests in the region in 1998-99;
- the most popular activities undertaken in both parks and forests in the region include bushwalking, camping, picnicing, sightseeing, fishing and four-wheel driving. Within forests, other popular activities include horse riding and trail and mountain bike riding;
- attributes that are sought by visitors to forested areas in the region include lookouts, flora, fauna, waterfalls, rivers, mountains, hardwood forests and Aboriginal and European cultural heritage;

- a majority of visitors to the region were from outside the study area, predominantly Sydney and Canberra. Visitation was greatest during Summer and Spring school holiday periods;
- future visitor trends and opportunities within the region include the continued growth of ecotourism, adventure sports and four-wheel driving, integration of forests with other tourist icons in the region (snowy mountains and beaches) and opportunities for "short breaks" in a region close to major urban population centres;
- the economic value of park and forest based tourism and recreation in the region was estimated using consumer surplus (\$20 to \$79 million) and expenditure based approaches (\$69 to \$113 million). Employment created, both directly and indirectly, was estimated to be between 1 380 and 2 415;
- a change in tenure from State forest to national park will provide opportunities for the nature based tourism and recreation industry (associated with change in tenure to national park) as well as potentially impacting upon specific forest based activities such as horse riding, four-wheel driving, bike riding and camping;
- management options to increase the economic and social benefits attributable to sustainable forest based tourism and recreation relate to access, infrastructure development, information and interpretation, marketing and industry facilitation; and
- in addition to established regional framework indicators, other operational indicators that are useful in monitoring sustainable forest use in the region include: percentage of visitors and locals satisfied with their experience; number of tourism and recreation lessees in forested areas; expenditure per visitor; and area of forest covered by tourism and recreation plans.

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12. ABBREVIATIONS USED IN THIS REPORT

ABS	Australian Bureau of Statistics
BTR	Bureau of Tourism Research
C&I	Criterion and indicators
CRA	Comprehensive Regional Assessment
DTM	Domestic Tourism Monitor
DUAP	NSW Department of Urban Affairs and Planning
ESFM	Ecologically Sustainable Forest Management
GIS	Geographical Information Systems
IVS	International Visitor Survey
LGA	Local Government Area
LNE	Lower North East
MIG	Montreal Process Implementation Group
NPWS	National Parks and Wildlife Service
NVS	National Visitor Survey
RACD	Resource and Conservation Division of DUAP
RFA	Regional Forest Agreement
SFNSW	State Forests of New South Wales
TNSW	Tourism NSW
UNE	Upper North East

13. APPENDICIES

APPENDIX 2A INTERNATIONAL VISITS TO NEW SOUTH WALES REGIONS

International Visits to New South Wales Regions, 1988 to 1997

Region	Year									
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
South Coast	31,500	22,900	26,600	28,400	28,600	27,900	38,900	28,700	29,600	29,854
Illawarra	42,700	37,400	44,300	35,600	26,000	33,400	41,100	49,500	53,300	75,036
Central Coast	12,925	11,950	13,300	19,000	15,600	15,500	24,000	19,000	25,900	27,149
Blue Mountains/Hawkesbury	38,775	35,850	39,900	42,700	49,500	49,900	56,000	66,800	80,600	93,673
Snowy Mountains	20,200	14,600	28,800	19,000	18,200	17,700	25,000	22,600	21,500	19,136
Southern Tablelands	9,000	8,300	13,300	14,200	13,000	9,500	10,700	17,500	10,600	10,898
Murray	22,500	16,600	33,200	30,800	23,400	29,900	32,200	28,900	28,400	21,823
Riverina	13,500	12,500	26,600	16,600	23,400	17,100	28,700	26,400	23,000	21,231
Central West	24,700	16,600	22,100	19,000	15,600	18,600	18,400	21,500	22,200	21,388
Hunter	60,700	47,800	57,600	64,000	59,900	61,300	67,600	75,700	75,500	91,650
Lower North Coast	69,700	52,000	59,800	64,000	54,700	65,300	75,300	69,800	62,800	73,634
Mid North Coast	63,000	49,900	53,200	54,500	57,300	62,100	73,300	64,400	67,400	84,164
Upper North Coast	49,500	49,900	66,400	71,100	72,900	78,200	96,800	112,900	127,800	151,381
New England	31,500	33,300	26,600	33,200	23,400	28,400	21,800	30,100	29,600	42,929
Orana	20,200	16,600	24,400	19,000	15,600	17,100	22,400	25,400	25,300	25,288
Far West	13,500	8,300	8,900	7,100	7,800	8,500	10,400	12,600	13,800	11,684
Total (excl. Syd)	523,900	434,500	545,000	538,200	504,900	540,400	642,600	671,800	697,300	800,918
Sydney (million)	1.6	1.4	1.5	1.5	1.7	1.8	2.1	2.3	2.5	2.5
Total (inc. Syd) (million)	2.1	1.8	2.0	2.1	2.2	2.3	2.7	2.9	3.2	3.3

Source: Tourism NSW

Note:

1. Date for 1988 and 1989 has been amended to reflect split of Outer Sydney into Central Coast and Hawkesbury/Blue Mountains.

APPENDIX 2B ESTIMATED INTERNATIONAL VISITATION TO SOUTHERN CRA REGIONS

Estimated International Visits to Regions in Southern CRA Region, 1988 to 1997

Region	Year									
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
South Coast	23,625	17,175	19,950	21,300	21,450	20,925	29,175	21,525	22,200	22,391
Illawarra	32,025	28,050	33,225	26,700	19,500	25,050	30,825	37,125	39,975	56,277
Blue Mountains/Hawkesbury	9,694	8,963	9,975	10,675	12,375	12,475	14,000	16,700	20,150	23,418
Snowy Mountains	18,180	13,140	25,920	17,100	16,380	15,930	22,500	20,340	19,350	17,222
Southern Tablelands	6,750	6,225	9,975	10,650	9,750	7,125	8,025	13,125	7,950	8,174
Murray	2,250	1,660	3,320	3,080	2,340	2,990	3,220	2,890	2,840	2,182
Riverina	1,350	1,250	2,660	1,660	2,340	1,710	2,870	2,640	2,300	2,123
Central West	3,705	2,490	3,315	2,850	2,340	2,790	2,760	3,225	3,330	3,208
Total	97,579	78,953	108,340	94,015	86,475	88,995	113,375	117,570	118,095	134,995

Source: Estimated from Tourism NSW data

Note:

1. Date for 1988 and 1989 has been amended to reflect split of Outer Sydney into Central Coast and Hawkesbury/Blue Mountains.

APPENDIX 2C DOMESTIC VISITS TO NEW SOUTH WALES REGIONS

Domestic Visits to New South Wales Regions, 1987-88 to 1996-97

Region	Year									
	87-88	88-89	89-90	90-91	91-92	92-93	93-94	94-95	95-96	96-97
	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000
South Coast	989	931	964	852	806	875	930	1217	1173	1018
Illawarra	1506	1562	1610	1565	1155	1326	1158	2077	2402	2248
Outer Sydney	1614	1442	-	-	-	-	-			
- Central Coast	-	-	1107	778	917	1025	1014	1344	1205	1436
- Blue Mtns/Hawkesbury	-	-	453	504	708	782	758	746	872	817
Sydney	4075	3953	4105	4130	4376	4394	4655	5535	6128	5795
Snowy Mountains	553	568	512	449	493	449	430	524	834	623
Southern Tablelands	585	519	697	612	612	481	520	662	592	633
Murray	1166	915	941	975	921	850	793	1072	1175	1125
Riverina	772	795	667	773	643	652	700	864	836	888
Central Western	1009	890	907	798	866	857	890	1000	1168	1099
Hunter	1823	1757	1791	1737	1616	1635	1778	2115	2621	3179
Lower Nth Coast	1188	1100	1077	962	1032	964	875	1230	1221	1198
Mid Nth Coast	919	831	784	838	844	902	835	1187	1071	1162
Upper Nth Coast	926	1040	1049	1005	1045	1059	1043	1468	1169	1291
New England	1023	1207	1078	1113	1123	1121	1150	1285	1317	1479
Orana	870	823	841	652	856	832	835	1024	958	1133
Far Western	211	185	205	220	282	170	215	198	205	248
Total	19229	18518	18788	17964	18296	18373	18578	23548	24947	25372

Source: Tourism NSW

Note:

1. Prior to 1989-90, the Blue Mountains/Hawkesbury region was combined with the Central Coast region and referred to as Outer Sydney.

APPENDIX 2D DOMESTIC VISITOR NIGHTS IN NEW SOUTH WALES REGIONS

Domestic Visitor Nights Spent in New South Wales Regions, 1987-88 to 1996-97

Region	Year									
	87-88	88-89	89-90	90-91	91-92	92-93	93-94	94-95	95-96	96-97
	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000
South Coast	4279	4397	4978	4566	3964	4276	4207	5014	5113	4051
Illawarra	5325	5253	5159	5456	3975	4343	4007	6572	7219	7314
Outer Sydney	5122	5011	-	-	-	-	-			
- Central Coast	-	-	3763	2788	2852	3494	3045	3728	3406	4154
- Blue Mtns/Hawkesbury	-	-	1374	1510	2046	2103	2133	1795	2054	1930
Sydney	17819	16214	15548	16268	16480	15421	16867	18883	19843	19534
Snowy Mountains	2075	1823	2103	1529	1588	1688	1557	1828	2751	2181
Southern Tablelands	1591	1448	1715	1815	2018	1549	1601	1612	1546	1430
Murray	3386	2390	2705	2630	2720	2489	2292	3143	3181	2794
Riverina	2407	2243	1857	2268	1972	1800	1811	2688	2728	2953
Central Western	2780	2806	2605	2310	2516	2389	2728	2519	3096	2745
Hunter	6711	6401	6064	5745	5320	5498	5660	6668	7661	9323
Lower Nth Coast	5621	4761	5411	4473	4605	4272	3896	5550	4947	4724
Mid Nth Coast	4455	4269	3937	3951	3396	4270	3877	4708	4643	4295
Upper Nth Coast	4152	4136	4767	4345	4246	4745	4000	5579	4941	5274
New England	3206	3195	3365	3383	3213	2998	3288	3339	3606	4398
Orana	2562	2123	2510	2136	2427	2556	2141	2969	2739	2991
Far Western	813	677	882	587	954	658	850	614	642	836
Total	72304	67147	68743	65770	64292	64551	63959	77209	80116	80927

Source: Tourism NSW

Note:

1. Prior to 1989-90, the Blue Mountains/Hawkesbury region was combined with the Central Coast region and referred to as Outer Sydney.

APPENDIX 3A NATIONAL PARK VISITOR SEGMENTS

1. Natural adventurers Young singles and family groups who enjoy the outdoors. They have very positive attitudes to national parks and are into physically demanding and adventurous national park activities.
2. Escape to nature Older families and couples with higher income and education levels. They have very positive attitudes to national parks and have a high level of awareness of national parks. Their interest in parks is driven by the need to escape the pace of everyday life and desire for solitude. Non-active national park activities appeal most to this group.
3. Young thrillseekers Young singles and couples, especially males, who are highly active in their leisure-time pursuits. They enjoy physically demanding and adventurous activities. However, they are not particularly into national parks and only have a moderate awareness of national parks.
4. Out & about seniors Mature socially active older people who are probably retired or nearing retirement. They hold very positive attitudes to and have a high level of awareness of national parks. They are most likely to enjoy day tripping for picnics and scenic driving.
5. Nature made easy Mostly family groups and older couples, especially females employed in home duties or white collar occupations. They desire social activities that involve being with, though not revolving around, the family. Their awareness of national parks is moderate, their attitudes towards them are very positive and comfort is a key issue.
6. Social relaxers Mostly members of young and middle class family groups. They desire social activities that involve being with family and friends. They are not really into physical activities or the great outdoors. They have a low awareness of national parks and hold only average attitudes towards parks.
7. Family focussed The main leisure focus for these young and middle families revolves around family activities. They are not really into socialising or being active in their leisure time. They have a low awareness of and less than positive attitudes towards, national parks.
8. Home based seniors Older couples and mature singles. Not interested in being involved in physical activities, rather they are more interested in spending time with family, possibly as observers rather than participants. This group has a low awareness of national parks and parks are unlikely to appeal.
9. Indifferent youth Young singles (mostly males). They desire freedom and independence in the company of friends. They are not interested in physical activities and lack empathy with nature. Their awareness of national parks is very low and their attitudes are least positive of all groups.

Source: Market Solutions (1996a)

APPENDIX 3B STATE FOREST VISITOR SEGMENTS

1. Life, be in it (29%)

This group of people seek the challenge, excitement, skills and fitness development arising from the involvement with nature. Friendship associations dominate the group, the mean age is 30 years and the majority is males. They tend to travel farther to visit the forest, stay longer and re-visit the same site. They are involved in camping, BBQing, driving for pleasure and swimming and fishing, and are less likely to be involved in nature oriented activities such as bushwalking, bird watching or other environmental appreciation activities.
2. Back to nature (39%)

This group are family-oriented and appreciate the tranquility and scenic beauty of the bush. They do not seek excitement nor rely on recreational equipment, rather they prefer to explore the forest and learn more about nature. The mean age of this group is 37 years, there is no gender bias and members have a strong tertiary education bias. This group tend to visit the forest about once a year, staying longer and travelling further than either of group 3 or group 4.
3. Life, be out of it (19%)

The members of this group are extremely passive. It appears that rather than being motivated to visit the forest to enjoy the natural beauty or tranquility, they visit because they wish to be away from somewhere else. Members of this group are single adults with children, couples and loners. They have low participation in recreational activities compared with other groups and are more likely to be passively observing the environment or using equipment (horse riding, trailbike riding, cycling, canoeing, 4wding). There is a slight bias to females in this group with the mean age being 40 years. They travel short distance to reach the forest (< 1 hour) and stay one day or less.
4. Excitement freaks (13%)

Members of this group do not value being close to nature, do not appreciate the natural qualities of the forest nor value being involved with creative activities. They have an orientation towards challenging and exciting pursuits and the use of recreational equipment. They are likely to be involved in camping, swimming, sunbathing, boozing, boating, fishing, trailbike riding and 4wding. They are likely to have travelled more than 2 hours for their visit and are unlikely to re-visit the same site. This group has a slight male bias and an average age of 24 years.

Source: Chapman (1995)

APPENDIX 4A NATIONAL PARKS IN THE SOUTHERN CRA REGION

Name of National Park	Sub-region
Badja Swamps Nature Reserve	Coastal
Barren Grounds Nature Reserve	Coastal
Black Ash Nature Reserve	Coastal
Broulee Island Nature Reserve	Coastal
Budawang National Park	Coastal
Budderoo National Park	Coastal
Bungonia State Recreation Area	Coastal
Comerong Island Nature Reserve	Coastal
Conjola National Park	Coastal
Cudmirrah National Park	Coastal
Deua National Park	Coastal
Devils Glen Nature Reserve	Coastal
Eurobodalla National Park	Coastal
Goorooyarroo Nature Reserve	Coastal
Goura Nature Reserve	Coastal
Illawong Nature Reserve	Coastal
Macquarie Pass National Park	Coastal
Morton National Park	Coastal
Murramarang Aboriginal Area	Coastal
Murramarang National Park	Coastal
Narrawallee Creek Nature Reserve	Coastal
Nattai National Park	Coastal
NSW Jervis Bay National Park	Coastal
Queanbeyan Nature Reserve	Coastal
Red Rocks Nature Reserve	Coastal
Robertson Nature Reserve	Coastal
Rodway Nature Reserve	Coastal
Seven Mile Beach National Park	Coastal
Tinderry Nature Reserve	Coastal
Wadbilliga National Park	Coastal
Wallaga Lake Nature Reserve	Coastal
Yatheyattah Nature Reserve	Coastal
Abercrombie River National Park	Northern Tablelands
Blue Mountains National Park	Northern Tablelands
Kanangra-Boyd National Park	Northern Tablelands
Mundoonan Nature Reserve	Northern Tablelands
Razorback Nature Reserve	Northern Tablelands
Tarlo River National Park	Northern Tablelands
Bimberi Nature Reserve	Western Tablelands
Brindabella National Park	Western Tablelands
Burrinjuck Nature Reserve	Western Tablelands
Hattons Corner Nature Reserve	Western Tablelands
Kosciusko National Park	Western Tablelands
Scabby Range Nature Reserve	Western Tablelands
Wee Jasper Nature Reserve	Western Tablelands

Source: National Parks and Wildlife Service

APPENDIX 4B STATE FORESTS IN THE SOUTHERN CRA REGION

SFNSW Region	Management Area	State Forest No.	State Forest Name	Southern CRA Sub-region
Riverina	Holbrook	667	Benambra	Western Tablelands
Riverina	Holbrook	401	Livingstone	Western Tablelands
Riverina	Holbrook	404	Pulletop	Western Tablelands
Riverina	Monaro South	1029	Ingebirah	Western Tablelands
Riverina	Monaro South	1056	Mowamba	Western Tablelands
Riverina	Tumut	560	Bago	Western Tablelands
Riverina	Tumut	883	Batlow	Western Tablelands
Riverina	Tumut	817	Billapaloola	Western Tablelands
Riverina	Tumut	967	Bondo	Western Tablelands
Riverina	Tumut	582	Bungongo	Western Tablelands
Riverina	Tumut	647	Carabost	Western Tablelands
Riverina	Tumut	557	Clarkes Hill	Western Tablelands
Riverina	Tumut	945	Ellerslie	Western Tablelands
Riverina	Tumut	657	Green Hills	Western Tablelands
Riverina	Tumut	795	Mannus	Western Tablelands
Riverina	Tumut	556	Maragle	Western Tablelands
Riverina	Tumut	593	Micalong	Western Tablelands
Riverina	Tumut	1033	Minjary	Western Tablelands
Riverina	Tumut	646	Mundaroo	Western Tablelands
Riverina	Tumut	403	Murraguldrie	Western Tablelands
Riverina	Tumut	402	Ournie	Western Tablelands
Riverina	Tumut	591	Red Hill	Western Tablelands
Riverina	Tumut	592	Wee Jasper	Western Tablelands
Riverina	Tumut	642	Woomargama	Western Tablelands
South Coast	Badja	567	Badja	Coastal
South Coast	Badja	569	Glen Fergus	Coastal
South Coast	Batemans Bay	870	Bateman	Coastal
South Coast	Batemans Bay	838	Benandarah	Coastal
South Coast	Batemans Bay	566	Bolaro	Coastal
South Coast	Batemans Bay	832	Boyne	Coastal
South Coast	Batemans Bay	1009	Buckenbowra	Coastal
South Coast	Batemans Bay	835	Clyde	Coastal
South Coast	Batemans Bay	769	Croobyar	Coastal
South Coast	Batemans Bay	820	Currowan	Coastal
South Coast	Batemans Bay	834	Flat Rock	Coastal
South Coast	Batemans Bay	828	Kioloa	Coastal
South Coast	Batemans Bay	549	Mogo	Coastal
South Coast	Batemans Bay	144	Monga	Coastal
South Coast	Batemans Bay	837	North Brooman	Coastal
South Coast	Batemans Bay	921	Quart Pot	Coastal
South Coast	Batemans Bay	836	Shallow Crossing	Coastal
South Coast	Batemans Bay	830	South Brooman	Coastal
South Coast	Batemans Bay	427	Termeil	Coastal
South Coast	Batemans Bay	143	Wandera	Coastal

South Coast	Batemans Bay	755	Woodburn	Coastal
SFNSW Region	Management Area	State Forest No.	State Forest Name	Southern CRA Sub-region
South Coast	Batemans Bay	974	Yadboro	Coastal
South Coast	Monaro South	563	Ironmungie	Coastal
South Coast	Monaro South	564	Wullwye	Coastal
South Coast	Moss Vale	881	Bangadilly	Coastal
South Coast	Moss Vale	714	Belanglo	Coastal
South Coast	Moss Vale	1045	Jellore	Coastal
South Coast	Moss Vale	860	Keverstone	Coastal
South Coast	Moss Vale	907	Meryla	Coastal
South Coast	Moss Vale	703	Penrose	Coastal
South Coast	Moss Vale	749	Wingello	Coastal
South Coast	Moss Vale	878	Yarrowa	Coastal
South Coast	Narooma	606	Bodalla	Coastal
South Coast	Narooma	137	Corunna	Coastal
South Coast	Narooma	926	Dampier	Coastal
South Coast	Narooma	139	Moruya	Coastal
South Coast	Narooma	136	Mungerarie	Coastal
South Coast	Narooma	1008	Wandella	Coastal
South Coast	Nowra	426	Colymea	Coastal
South Coast	Nowra	863	Conjola	Coastal
South Coast	Nowra	148	Currambene	Coastal
South Coast	Nowra	146	Jerrawangala	Coastal
South Coast	Nowra	425	McDonald	Coastal
South Coast	Nowra	423	Nowra	Coastal
South Coast	Nowra	916	Shoalhaven	Coastal
South Coast	Nowra	818	Tomerong	Coastal
South Coast	Nowra	643	Yalwal	Coastal
South Coast	Nowra	920	Yerriyong	Coastal
South Coast	Queanbeyan	145	Bendoura	Coastal
South Coast	Queanbeyan	565	Berlang	Coastal
South Coast	Queanbeyan	577	Tallaganda	Coastal
Western	Bathurst	993	Blenheim	Northern Tablelands
Western	Bathurst	1024	Essington	Northern Tablelands
Western	Bathurst	825	Gurnang	Northern Tablelands
Western	Bathurst	631	Jenolan	Northern Tablelands
Western	Bathurst	999	Lowes Mount	Northern Tablelands
Western	Bathurst	995	Norway	Northern Tablelands
Western	Bathurst	621	Vulcan	Northern Tablelands

Source: State Forests of NSW

APPENDIX 4C AREA OF NATIONAL PARK BY PARK

Park Name	Area (km2)
Kosciusko National Park	6 653.87
Morton National Park	1 759.69
Deua National Park	823.84
Kanangra-Boyd National Park	608.94
Blue Mountains National Park	376.89
Budawang National Park	237.63
Wadbilliga National Park	204.01
Abercrombie River NP	186.34
Tinderry Nature Reserve	136.10
Brindabella National Park	119.82
Tarlo River National Park	82.04
Bimberi Nature Reserve	70.62
Budderoo NP	59.62
Scabby Range Nature Reserve	48.73
Bungonia State Recreation Area	40.39
Razorback Nature Reserve	26.51
Cudmirrah National Park	23.29
Eurobodalla National Park	22.66
Murramarang National Park	21.42
Barren Grounds NR	20.79
Outside NPWS Estate	19.70
Mundoonan Nature Reserve	13.82
Burrinjuck Nature Reserve	12.87
NSW Jervis Bay National Park	11.96
Conjola National Park	10.48
Seven Mile Beach National Park	7.86
Comerong Island Nature Reserve	7.12
Red Rocks Nature Reserve	6.81
Narrawallee Creek NR	6.71
Goura Nature Reserve	6.29
Wee Jasper Nature Reserve	6.28
Badja Swamps NR	5.43
Macquarie Pass NP	5.11
Goorooyarroo NR	2.83
Outside NPWS Estate	2.77
Wallaga Lake NR	1.03
Black Ash Nature Reserve	0.96
Rodway Nature Reserve	0.86
Murramarang Aboriginal Area	0.58
Illawong Nature Reserve	0.52
Devils Glen Nature Reserve	0.41
Broulee Island NR	0.30
Yatheyattah Nature Reserve	0.19
Robertson Nature Reserve	0.05
Hattons Corner NR	0.04
Queanbeyan Nature Reserve	0.02

Nattai National Park	0.01
APPENDIX 4D COMMERCIAL TOURISM & RECREATION INDUSTRY OPERATOR SURVEY	

(The format or presentation of this survey has been amended to fit the RACD report format).

RESEARCH FOR SOUTHERN REGIONAL FORESTRY AGREEMENT

RECREATION AND TOURISM STUDY

INDUSTRY OPERATOR SURVEY

Please return your response by Friday 10th September 1999 in the enveloped provided.

The information you provide will assist shape forest management policy in your area.

If you have any questions about this survey or need clarification about any of the questions, please contact Adrian Taylor of Hassall and Associates on 02 9241 5655.

CONFIDENTIALITY

The name of your organisation will only be used to check response rates and to support the integrity of the survey. After marking a response beside your organisation's name to show you have responded, Hassall and Associates staff will enter the data. This will not include the organisation's name, which will be detached from the survey and destroyed.

Complete these three questions first

What is the name of your organisation?

Do you offer organised activities to the public that involve the use of State Forests or plan to offer such activities in the next 5 years?

☐ Yes

☐ No ⇒ end survey – please return in the envelope provided

Are these State Forests in the area shown on the first page of this survey?

☐ Yes

☐ No ⇒ end survey – please return in the envelope provided

Q1: How long have you been taking people to State Forests on a commercial basis?

☐ Less than 1 year

☐ More than 1 year and less than 5 years

☐ More than 5 years

Q2: Do you plan to offer activities in State Forests over the next 3 years:

☐ Definitely plan to offer them

- ☐ Unsure if you will offer them or not
☐ Definitely will not offer them

Q3: Is the State Forest activity the only commercial tourism activity that you operate?

- ☐ Yes
☐ No

Q4: Considering all activities related to your business, in the 1998-99 financial year how many full-time jobs were associated with operating this business? *(Include yourself and other family members. If you have been operating for less than 12 months estimate as at the first year anniversary)*

Full time jobs (assume a full time job is 40 hrs per week) _____

Q5: Based on the 1998-99 financial year, approximately how many full-time jobs are associated with the commercial tourism activities that involve State Forests?

Full time jobs related to State Forest activity _____

Q6: For the financial years 1996-97, 1997-98 and 1998-99 (if you operated the State Forest activity then), approximately how many clients did you take on these commercial forest activities?

1996-97 _____

1997-98 _____

1998-99 _____

Q7: In the table below, please specify the activities that you offer in State Forests, the name of the State Forest that the activity is undertaken in, the average adult tariff charged for this activity per person, the number of visitors that undertook each activity last financial year, the months in which the activity is offered and whether each activity is intended to be offered in the coming year. *An example has been provided for you.*

Activity in the State Forest (be as specific as possible)	State Forest Used (or "not known" if name is not known)	Average Adult Tariff Charged for this activity per person (\$)	Estimate of number of visitors undertaking this activity with you in 1998-99.	Months in which activity is undertaken	Intention to operate in coming year: (Definite/maybe/no)
Trail Bike Rides	Moruya State Forest	\$25	150	All, except Dec	Definite

If you need more space please attach a separate sheet

Q8: Do you offer other non-state forest based activities whilst on the State Forest trip? *(for example, you may visit other sites during the trip that are not related to the State Forest).*

- ☐ Yes
☐ No

Q9: If yes, what proportion of the total trip time is devoted to State Forest based activities? (e.g. 80% of total activities undertaken on the trip are undertaken in the State Forest) _____ %

Q10: On your trips, do you visit sites that relate to aboriginal culture and heritage?

- ☐ Yes
☐ No

If "yes", in what State Forests are these sites?

Q11: What are the other key sites and things of interest that you visit in State Forests? (this may include icons such as waterfalls, lookouts, wildlife, flora)

Sites or things of interest	State Forest Name

Q12: In the aspect of your business that relates to State Forest activity, what local goods and services do you use (ie within your local shire):

- ☐ Fuel
☐ Food
☐ Equipment/vehicle repair and maintenance
☐ Marketing/printing/office supplies
☐ Business administration
☐ Permits fees
☐ Other (please specify)

Q13: Thinking about these local goods and services that relate to the State Forest activity, please estimate how much you would have spent on these – combined – over the past 12 months: \$

Q14: For your commercial state forest activity overall please estimate the percentage of the clients over the past 12 months that came from each of the following categories:

Origin of client	Percentage of overall clients in past 12 months
Live locally (within 1 hrs drive, excluding ACT)	
Live in Sydney and surrounding suburbs	
Live in ACT	
Live in regional NSW but not locally (excludes Sydney and suburbs)	
Live interstate (exclude those within 1 hr drive)	
Live overseas	
Don't Know	

Q15a: For your clients who come from Sydney or regional NSW (don't include locals), please estimate as best you can the number who have come to the area with your trip as their main purpose, and those who come mainly for another reason and do your trip whilst they are in the area:

Purpose of visit to the area <i>Sydney & suburbs, regional NSW (but not locals)</i>	Estimate % of overall clients in past 12 months
Your trip as the main purpose for coming to the area	
Visiting the area mainly for another reason	

Q15b: For your clients who come from ACT, please estimate as best you can the number who have come to the area with your trip as their main purpose, and those who come mainly for another reason and do your trip whilst they are in the area:

Purpose of visit to the area <i>Interstate clients (but not locals)</i>	Estimate % of overall clients in past 12 months
Your trip as the main purpose for coming to the area	
Visiting the area mainly for another reason	

Q15c: For your clients who come from interstate, please estimate as best you can the number who have come to the area with your trip as their main purpose, and those who come mainly for another reason and do your trip whilst they are in the area:

Purpose of visit to the area <i>Interstate clients (but not locals)</i>	Estimate % of overall clients in past 12 months
Your trip as the main purpose for coming to the area	
Visiting the area mainly for another reason	

Q15d: For your clients who come from overseas please estimate as best you can the number who have come to the area with your trip as their main purpose, and those who come mainly for another reason and do your trip whilst they are in the area:

Purpose of visit to the area <i>Overseas clients</i>	Estimate % of overall clients in past 12 months
Your trip as the main purpose for coming to the area	
Visiting the area mainly for another reason	

Q16: Do you see many people who use State Forests that are not a part of an organised commercial activity:

- ☐ Yes
☐ No

Q17: On any given day, how many people would you likely see using the State Forest that are not a part of an organised commercial activity:

- ☐ 1
☐ 1-3
☐ 3-10
☐ More than 10

Q18: What activities have you observed people undertaking in the past 12 months in the State Forests you have visited that are not a part of an organised commercial activity? Please estimate how often you see people undertaking this type of activity:

Activity observed	How often you observe the activity each trip (1 = rarely 5 = always) - please circle				
Mountain bike riding	1	2	3	4	5
Running	1	2	3	4	5
walking	1	2	3	4	5
4WD	1	2	3	4	5
rally driving	1	2	3	4	5
horse riding	1	2	3	4	5
trail bike riding	1	2	3	4	5
orienteering	1	2	3	4	5
bowhunting/archery	1	2	3	4	5

Other activities (please specify below)

	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5

Q19: Do you visit a national park as part of your State Forest trip?

- ☐ Yes
☐ No

Q20: Are you actively involved in planning for a business expansion/development in relation to your forest-related trips some time in the next 3 years?

- ☐ Yes
☐ No

Q21: What type of activities are related to these development plans?

Activity that you will expand/introduce

END OF SURVEY

**PLEASE RETURN TO HASSALL & ASSOCIATES IN THE REPLY PAID ENVELOPE
PROVIDED BY FRIDAY 10th SEPTEMBER 1999**

THANKS FOR YOUR CO-OPERATION

APPENDIX 5A STATE FOREST USER SURVEY

(The format or presentation of this survey has been amended to fit the RACD report format).

RESEARCH FOR SOUTHERN REGIONAL FORESTRY AGREEMENT**RECREATION AND TOURISM STUDY****STATE FOREST USER SURVEY**

Please return your response by Friday 1st October 1999 in the reply paid enveloped provided.

The information you provide will assist shape forest management policy in your area.

If you have any questions about this survey or need clarification about any of the questions, please contact Adrian Taylor of Hassall and Associates on 02 9241 5655.

CONFIDENTIALITY

All survey responses you provide will be dealt with in a confidential manner. Upon receiving your response, Hassall & Associates staff will enter the data into the results database. Only aggregated results will be used to assist in drawing survey conclusions.

Complete these four questions first

Do you live in the region shown on the map on the first page?

☐

YES

☐

NO

What is the postcode of the suburb/town you live in?

Do you undertake any recreation or tourism activities that involve the use of State Forests?

☐

YES

☐

NO ⇒ end survey – please return in the envelope provided

D. Are these State Forests in the area shown on the map on the first page of this survey?

☐

YES

☐

NO ⇒ end survey – please return in the envelope provided

Q1: Using the overall region map on page one, please tick the sub-region or sub-regions in which you use State Forests. If you are aware of the name of the State Forest(s) that you use, please list them.

- ☐ South Coast
- ☐ Tumut
- ☐ Northern

Name of State Forest (if you are aware of it)

Q2: Thinking about the past 12 months from September 1998 to September 1999, please complete the following table. *An example has been provided in the first row to assist you.*

Q2a) Name of State Forests you have visited (if you don't know the name, write nearest town)	Q2b) Activity undertaken in this State Forest (Activities will include bushwalking, bird watching, trailbike riding, horse riding, 4Wding, etc.)	Q2c) How do you get to this State Forest? (Mode of transport may be private car, hire car, bus/coach, motorcycle, train, bicycle, animal etc.)	Q2d) How long does it take you to get to this State Forest from your home? (hours and minutes)	Q2e) Indicate the number of visits you have made to the State Forest over the last 12 months.	Q2f) Please estimate the average amount of time you spend in the State Forest for each visit.	Q2g) Typically, how many people are in your party when you visit the state forest?
Example: Mogo SF.	Example: Trailbike Riding	Motorcycle	20 minutes	4	3 hrs	3 persons

Q3: For all the activity that you have undertaken in the State Forests in the past 12 months, please indicate the proportion you undertake as part of an organised club or association (e.g a 4WD club or bushwalking association) and the proportion that is undertaken on an informal basis either alone or with a group of friends/peers.

Type	Proportions (%)
Part of an organised club/association	
With friends/peers or alone	
TOTAL	100%

Q4: For activity that is conducted as part of an organised club or association, what is the name of this club/association? (please list)

Q5: Considering all the activity undertaken in State Forests in the past 12 months, how much of it would you say you do in the State Forests in the Southern region shown in the attached map?

- ☐ All
☐ Most
☐ Some
☐ Very Little

☐ None

Q6: Is the activity you undertake in the State Forest the main purpose of your trip, or do you undertake this activity as part of an integrated trip that has other purposes? (*e.g you may visit the State Forest as a dedicated trip or as part of a stop-over on a trip that has other activities, such as visiting the beach*). **Please tick the most accurate response above.**

- ☐ Always the main purpose of the trip
☐ Mostly the main purpose of the trip
☐ Mostly part of a trip with another main purpose
☐ Always part of a trip with another main purpose

Q7: Please indicate during which months you visited the state forests in the past 12 months.

- ☐ January
☐ February
☐ March
☐ April
☐ May
☐ June
☐ July
☐ August
☐ September
☐ October
☐ November
☐ December

Q8: Do you visit sites that relate to aboriginal culture and heritage within State Forests?

- ☐ Yes (please specify below)
☐ No (go to Q9)

If "yes", in what State Forests are these sites?

Q9: What are the other key sites and things of interest that you visit in the State Forest. This includes particular attributes of the forest and icons within the forest (*icons may include waterfalls, lookouts, wildlife, flora*).

Site or thing of interest	State Forest Name

Q10: On any given day, how many other people would you likely see using the State Forest:

- ☐ Nil
☐ 1
☐ 1-3
☐ 3-10
☐ More than 10

Q11: Would you say that **over the last 12 months** you visited State Forests more or less frequently than you did on average over the last three years?

- ☐ More frequently
☐ Less frequently

Q12: Do you anticipate that on average over the next 3 years you will visit State Forests more or less frequently than you did during **the last 12 months**?

- ☐ More frequently
☐ Less frequently

Q13: What activities have you observed people undertaking in the past 12 months in the State Forests you have visited? Please estimate how often you see people undertaking this type of activity:

(please fill out following table)

Activity observed	How often you observe the activity each trip (1 = rarely 5 = always) - please circle				
Mountain bike riding	1	2	3	4	5
Running	1	2	3	4	5
Walking	1	2	3	4	5
4WD	1	2	3	4	5
Rally driving	1	2	3	4	5
Horse riding	1	2	3	4	5
Trail bike riding	1	2	3	4	5
Orienteering	1	2	3	4	5
Bowhunting/archery	1	2	3	4	5
Fishing	1	2	3	4	5
Camping	1	2	3	4	5

Other activities (please specify below)

	1	2	3	4	5
	1	2	3	4	5

Q14: Thinking about the activity you undertake in State Forests, what things do you need to purchase on a day-to-day basis whilst you are doing this activity? We are only interested in activities that relate to the use of State Forests and things you need to buy whilst you are actually doing your activity.

- ☐ Fuel
☐ Food & Drinks
☐ Repairs to equipment
☐ Accommodation
☐ Other (please specify)

Q15: Please give us your best estimate of how much you spent on these items – related to undertaking your activity – whilst you were in the region in the past 12 months.

Item	\$ estimate
Fuel	
Food & Drinks	
Repairs to equipment	
Accommodation	
Other (please specify)	
Other (specify)	
Other (specify)	
TOTAL EXPENDITURE	

Q16: Are there any current restrictions that impede your use of state forests? Restrictions may be related to permits, management, areas of use, etc.

- ☐ Yes (please specify below)
☐ No (go to Q13)

If “yes”, please list the restriction and how it impedes your use of the State Forest.

Q17: Thinking about the activities that you undertake in State Forests, do you also visit National Parks to undertake these activities?

- ☐ Yes (please specify below)
☐ No (go to Q14)

Please list those activities you also undertake in National Parks

Q18: Considering the activities you undertake in State Forests, please list the activities, that as far as you are aware, are not permitted in National Parks.

END OF SURVEY

**PLEASE RETURN TO HASSALL & ASSOCIATES IN THE REPLY PAID ENVELOPE
 PROVIDED BY FRIDAY 1st OCTOBER, 1999.**

THANKS FOR YOUR CO-OPERATION

APPENDIX 6A CONSUMERS' SURPLUS BY SUB-REGION

Consumers' Surplus Associated with National Park Visitation

Sub-region	Consumers' Surplus (\$ millions)	
	Low Estimate	High Estimate
Coastal	\$11.9	\$46.9
Western Tablelands	\$5.4	\$21.3
Northern Tablelands	\$0.3	\$1.0
Total	\$17.5	\$69.2

Consumers' Surplus Associated with State Forest Visitation

Sub-region	Consumers' Surplus (\$ millions)	
	Low Estimate	High Estimate
Coastal	\$2.1	\$8.5
Western Tablelands	\$0.4	\$1.4
Northern Tablelands	\$0.05	\$0.2
Total	\$2.5	\$10.0

APPENDIX 6B EXPENDITURE (APPROACH ONE) BY SUB-REGION

Expenditure (Approach One) Associated with National Park Visitation

Sub-region	Expenditure (\$ millions)	
	Low Estimate	High Estimate
Coastal	\$49.7	\$62.1
Western Tablelands	\$22.5	\$28.1
Northern Tablelands	\$1.1	\$1.3
Total	\$73.2	\$91.5

Expenditure (Approach One) Associated with State Forest Visitation

Sub-region	Expenditure (\$ millions)	
	Low Estimate	High Estimate
Coastal	\$8.9	\$11.1
Western Tablelands	\$1.5	\$1.9
Northern Tablelands	\$0.2	\$0.3
Total	\$10.6	\$13.3

APPENDIX 6C EXPENDITURE (APPROACH TWO): PARKS, BY SUB-REGION

Expenditure (Approach Two) Associated with National Park Visitation

Sub-region	Expenditure (\$ millions)	
	Low Estimate	High Estimate
Coastal	\$40.7	\$67.1
Western Tablelands	\$18.4	\$30.4
Northern Tablelands	\$0.9	\$1.4
Total	\$60.0	\$99.0

APPENDIX 6D EXPENDITURE (APPROACH TWO): FORESTS, BY SUB-REGION

Expenditure (Approach Two) Associated with State Forest Visitation

Sub-region	Expenditure (\$ millions)	
	Low Estimate	High Estimate
Coastal	\$7.3	\$12.1
Western Tablelands	\$1.2	\$2.0
Northern Tablelands	\$0.2	\$0.3
Total	\$8.7	\$14.3