




BANKWEST CURTIN ECONOMICS CENTRE

ENHANCING NICHE TOURISM

Prospects for south west Western Australia to integrate tourism and agri-food systems

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About the Centre

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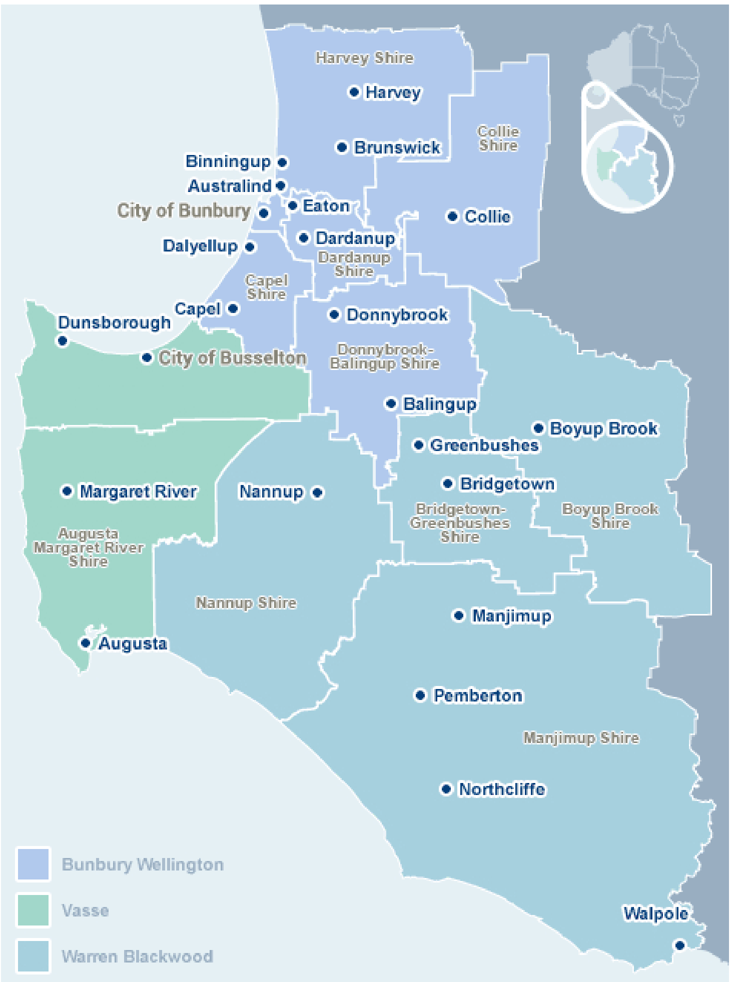
Enhancing

niche tourism in Western Australia: Defining the case

These areas are local government regions, and are created within political boundaries of the local shires. On a tourism level, the best-known towns are Margaret River (the South West) and Albany (the Great Southern). While Margaret River is a SuperTown under the WA Government scheme, Albany is not (Government of Western Australia, 2012).

To ensure that the study examined comparable cases, two SuperTowns and their surrounding shires with substantial agricultural industry were chosen: Manjimup in the South West (see Figure 1) and Katanning in the Great Southern (see Figure 2). Interviews were conducted in the towns and shires of Bridgetown-Greenbushes, Nannup, Boyup Brook and Manjimup (the South West) and Katanning, Gnowangerup, Kojonup and Cranbrook (the Great Southern). In total 39 interviews were conducted during August 2016 (see Table 2).

Figure 1 Map of the South West



Source: South West Development Commission (n.d.)

Figure 2 Map of the Great Southern

Source: Great Southern Development Commission (n.d.)

Table 2 Interviews in WA's south west

	Retailers	Government/ Council/ Associations	Farmers/ Food producer	Total
South West	3	5	10	18
Great Southern	3	7	9	19
State	0	2	0	2
Total	**6**	**14**	**19**	**39**

Source: Bankwest Curtin Economics Centre | Authors' analysis.

Furthermore, this research interrogated Tourism Research Australia, Australian Bureau of Statistics (ABS) data and local government and state strategy and planning documents to develop the framework approach to produce a system map delivering key insights into the regional capability of WA's jouth n est to utilise niche tourism through agri-tourism. The research adopted a systems approach to innovatively and holistically expose and systematise the informing elements and levels of influence that exist in socio-agricultural regional systems (Bosch, King *et al.*, 2007). The project used systems-thinking methodology (Jackson 2003; Senge 2006) to provide a robust means to investigate the multiple and complex issues involved in fostering regional sustainability. System-mapping techniques involved Leximancer analysis of key regional strategy documents.

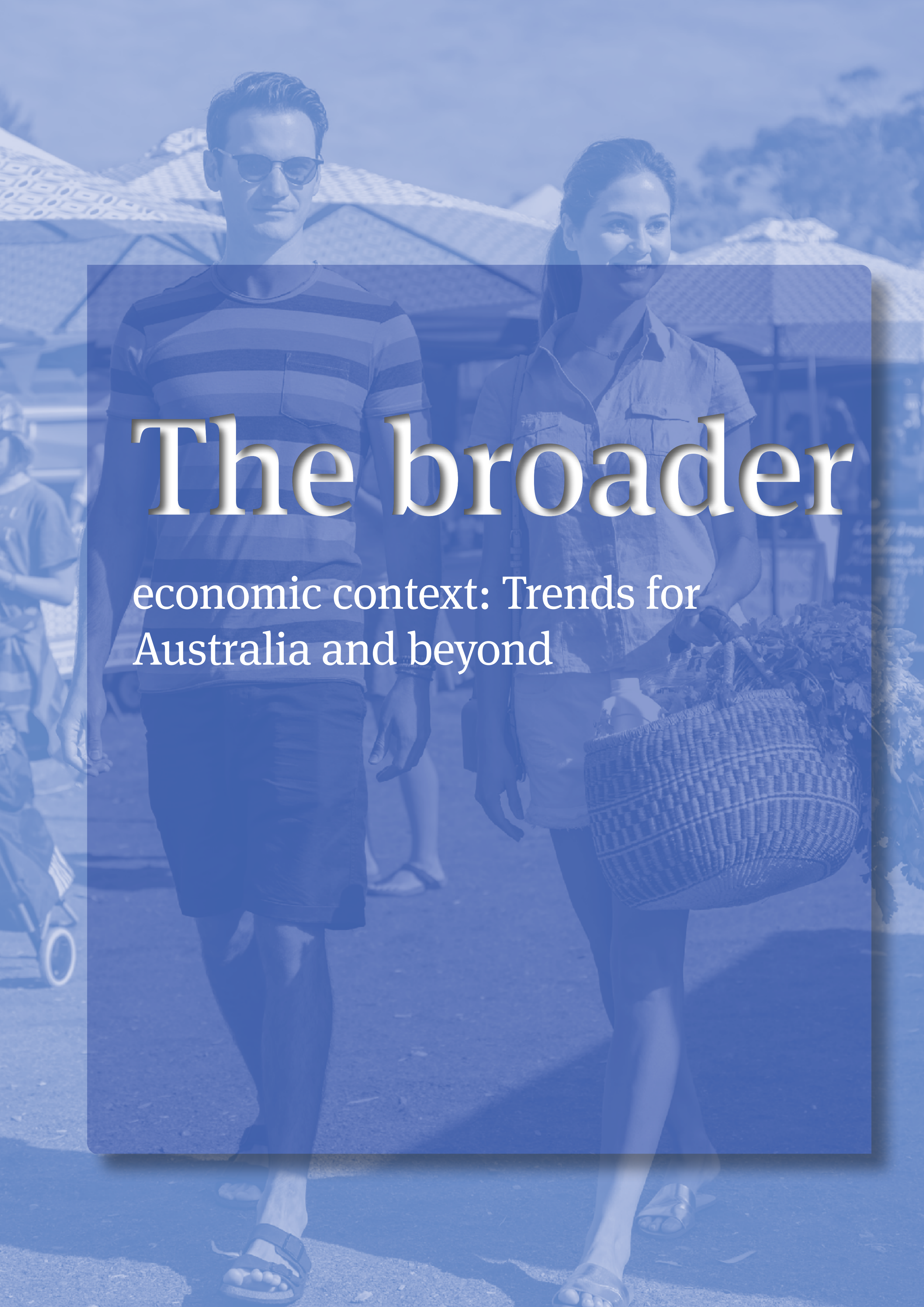
The research project was conducted in several stages:

- **Stage 1** involved gathering secondary evidence about the tourism opportunities and strategies, food system, stakeholders and key frameworks of influence from public and regional resources.
- **Stage 2** involved identifying stakeholders as potential participants for semi-jkilZkli[illegible]nterviews, and these key informants were then interviewed in August 2016. A total of 39 semi-structured interviews were undertaken. These interviews were audiotaped and transcribed.
- **Stage 3** delivered the analysis from the two regional cases to reveal common elements, influences and connections in a niche strategy based on agri-food and tourism.
- **Stage 4** analysed the results and findings from stage 2 interviews and examined potential tourism niche opportunities. These were presented to stakeholders through two workshops in Manjimup and Katanning, attended by 18 and 13 participants respectively in shire-based localities within the region.

Report structure

The report outlines the case for tourism, and particularly niche tourism, as the vehicle for regional development in the south west region of WA. The method of mapping the tourism strategies through a software program (Leximancer), interviewing actors within the region and engaging with regional stakeholders through workshops reporting the initial findings of the interviews and regional strategies is explained. The two case studies are examined, and findings reported. Three niche tourism opportunities for each study area are introduced and ideas for the way forward outlined. Finally, a summary and conclusions about the ability of niche tourism to support a cohesive strategy to diversify and improve destination appeal are put forward.

The broader economic context: Trends for Australia and beyond



Trends in global tourism

Tourism is an important contributor to economic development and can be seen to have been generally increasing each year since the 1950s (United Nations World Tourism Organization [UNWTO], 2015). Its unique feature in a rapidly globalising world in which standardisation and mass production are pursued as competitive strategies for economic growth is that it resists easily transplanted business practices. In order to consume many tourism products there is usually a requirement to travel to the location, resisting the mobile capital-seeking of globalisation. UNWTO (2015) notes that tourism is one of the fastest growing sectors of global business, as it supports an export sector contributing to 9 per cent of global GDP and provides one in eleven jobs across the globe.

UNWTO (2015) claims that tourism is a generator of regional growth, not only through direct commercial tourist activities but through accelerating policy reform directed to assist small and medium-sized enterprises (SMEs) involved in tourism and associated business activities. The SME sector is the mainstay of niche tourism, so this flow-on effect is positive for developing a niche tourism strategy. Acknowledging the key influence of policy in developing tourism supports the role of the different levels of government in promoting a tourism strategy and, in particular, the critical role of local government in providing a favourable policy setting for local tourism operators and SMEs involved in all parts of the value chain to benefit from tourism in regions. Figures supplied by the ITB World Travel Trends Report in the first eight months of 2016 show an increase in outbound trips by 3.9 per cent. Figures also supplied by the ITB show that tourism generated almost $US2 trillion, increasing 7 per cent from 2015. While there was strong growth in tourism, the ITB data indicate that there were changes in tourists' destination preferences, with touring holidays falling by 5 per cent and more city trips (up by 15%) at the expense of 'sun and beach' holidays (ITB 2017).

Yeoman (2012) highlights that, in the period 2000 to 2008, the largest increases in outbound tourism from originating country were from countries such as Russia, India, Korea, Australia and China. Table 3 shows that China experienced a significant drive to experience tourism from 2000, as outbound travellers increased 338 per cent from 2000 to 2008. The potential for Chinese tourism has been grasped by other Australian states, with New South Wales, Victoria and Queensland being the states with the greatest share of Chinese tourists and, to a lesser extent but still with a relatively large visitor experience, Tasmania. Concomitantly, Australians travelled overseas in greater numbers, rather than travelling domestically.

Table 3 **Outbound tourism (selected countries 2000 to 2008)**

Country	2000	2008	% Change
	(000s)	(000s)	
China	10,473	43,844	338%
India	4,416	10,868	146%
Korea	5,508	11,996	118%
Australia	3,498	5,808	69%

Source: UNWTO, cited in Yeoman (2012).

Capturing a greater share of global outbound tourism is challenging. Destination appeal needs to be matched by ease of access to locations, and availability of accommodation and food at the outset. Other aspects, including costs, time to travel within the destination country, and quality of food and accommodation need to be considered as well. Australia generally is challenged by travel distance, so for travellers to embark on a tourist experience to Australia the destination needs to be compelling. Iconic visitor experiences, such as Sydney city, Uluru and central Australia, and the Great Barrier Reef, are drawcards for international tourists. Other less well-known Australian destinations require branding efforts to highlight regional attractions to international tourists, and also need to offer ways to support ease of access to those attractions.

Talwar (2012) posits that tourists have a "desire for a more personal, connected and informed experience" and suggests the future of tourism will entail: a growth in tourists from developing markets; a growing group of older, wealthier travellers; and there will be different and competing experiences demanded, including short breaks and better value, as opposed to more unique, one-off luxury experiences. The ability of tourism operators in regional WA to offer personalised services and align these with sophisticated food and accommodation offerings is critical for capturing tourists in the modern global economy. Attracting tourists from developing countries in the region is a possibility if outbound tourism increases from countries such as Indonesia (up 57% from 2000 to 2008), India (up 146% from 2000 to 2008) and China (up 338% from 2000 to 2008) (UNWTO, 2012).

According to Wilde and Cox (2008), destination competitiveness relies on three interlocking elements: quality tourism infrastructure, championing and collaboration by regional governance structures, and community culture including receptivity to tourism. These overarching aspects provide a window to understanding whether the potential of tourism can unlock regional assets and establish a new way of organising economic activity. Consideration of how to identify and unpack elements that contribute to destination competitiveness is a critical task. Niche tourism integrated with regional food and local product offerings requires identifying a complex mix of elements that are aligned to ensure the agri-food system provides value-added products and experiences.

Linking tourism and regional food production is by no means a certain way to ensure success and prosperity. Like other entrepreneurs, actors in the tourism and regional food sector face uncertainty and probable setbacks as a result of the challenge of competing with limited scale and scope of their activity (Lundmark and Westelius, 2017). To many, the road to a sustainable livelihood through regional food is one of effectuation (building on various opportunities offered) rather than generic business plan deployment. At a local level, like in regional clusters (Brown *et al.*, 2010), the existence of other tourism and regional food actors together with a framework of established value networks can be expected to increase the likelihood of entrepreneurial success. Understanding the complexity and the key components and relationships of viable regional food systems, how they contribute to the sustainable development of food systems in rural and peri-urban communities and, consequently, identifying constructive systemic interventions are a major objective of this project.

Prideaux (2002), in an analysis of the potential of peripheral regions to support increased tourism, found that the volume of tourist flows was governed by site significance, level of discomfort in travelling to the site and other conditions of the location, including the availability and condition of tourism infrastructure. The findings of this study have implications for tourism in regional WA as the status of peripheral regions is applicable here. The conditions under which tourists will travel long distances, with a concomitant ability to source quality accommodation and food along with high-quality, unique experiences, will affect the ability to attract large numbers of tourists – especially international tourists.

In their study of the Catlins region in New Zealand, Lovelock and Boyd (2006) found that the cross–border destination in a peripheral location suffered from fragmented approaches to the management and marketing of the region, differential treatment of the policy and regulatory elements across different jurisdictions and an inability to redress tourism impacts of the destination along with differential treatment in funding. Working together, while often put forward as a favoured policy option, is difficult to put into practice as it requires skills that rely on moving beyond competition and market-driven initiatives to coordinative action, collaborative endeavours or collective approaches that create joint objectives and move towards a single, shared goal (Keast, Mandell, Brown and Woolcock, 2004; Keast, Brown and Mandell, 2007). The value chain of tourism in sparsely populated regions requires greater levels of collaboration to ensure that branding and marketing efforts are effective, supply chains are efficient, costs are shared to scales that are not prohibitive to individual producers/enterprises and scarce resources are pooled to support collaborative efforts (Prideaux, 2002; Lovelock and Boyd, 2006). Tourism and tourist attractions in Western Australia particularly, may resist easily drawn solutions at a local government political level because, while a sustainable regional approach should build on larger scales than a particular shire in Western Australia, there are structural impediments to collaborative efforts beyond a single shire.

The potential of regional WA to attract tourists, then, depends on a range of interconnected elements at the current stage of maturity of the WA tourism market, and its ability to support international tourists will also be challenging. While data indicate that more people are travelling internationally and to more remote and inaccessible but interesting places, this growth in numbers of international travellers does not necessarily translate to increased tourist numbers in regions in WA, unless the destination attractiveness together with food and accommodation experiences align in specific ways. Using a niche tourism strategy, where specific tourist groups are targeted by promoting an explicit, niche experience, can be a way to overcome the impediments for tourism in WA by aligning existing favourable conditions of high-quality agri-food products with a unique tourism strategy for food lovers.

Greater access to information about destinations and a desire by tourists to find 'undiscovered places' means that the unique attributes of WA's south west could be a highly attractive tourist offering if there is a focus on niche tourism. However, this higher level of access to destination information and market intelligence means that there is global competition for international tourists to visit regional destinations.

Research by Prideaux (2002) confirms that, over longer distances, there is a general decay in numbers attending a tourist attraction. Dickenson and Peeters (2014), in their research about the way tourists experience time and subsequently allocate time and effort to tourist activities together with their predilections for certain types of destinations, found that tourists were increasingly affluent but were increasingly time-pressured and, consequently, high-speed surface transport in lieu of cars was a preferred option for contemporary travellers.

This result indicates challenges for increasing tourism in the south west region of WA, as there are long driving distances between centres, poor transport infrastructure, patchy accommodation offerings both in overall availability and quality in the region, and political borders that make joint marketing efforts challenging.

Tourism and economic trends – The bigger Australian picture

Australia has an overarching tourism policy – Tourism 2020 – which acknowledges the role of tourism in the economic development of regional Australia (Tourism Australia, 2011). While Tourism 2020 focuses on growth opportunities for tourism based on natural as well as cultural attractions, its emphasis is on harnessing the potential of tourism associated with Asia and enhancing digital capacity within the tourism sector, rather than giving prominence to regional tourism issues such as agri-tourism.

Tourism generated $AU107 billion in international visitor spend in 2014, tourist numbers increased 7 per cent and visitor spend increased 10 per cent (Tourism Australia, 2015). The share of international tourists to WA is smaller in comparison with the eastern states of Australia.

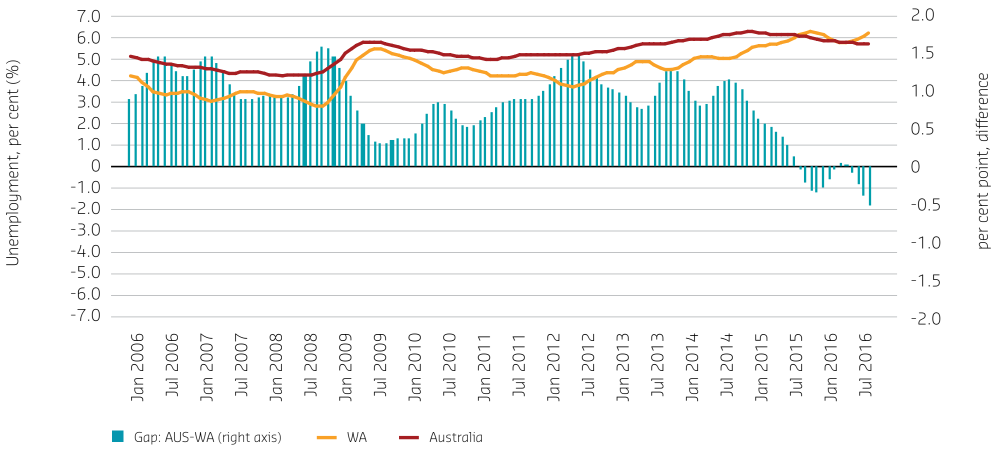
Table 4 shows that until 2014 WA had lower unemployment rates than most of the other states. However, following the end of the mining boom, these numbers changed dramatically as seen in Figure 3 and Figure 4. WA now has higher unemployment numbers than the Australian average.

Table 4 **Characteristics of the labour force by state/territory, July 2014**

Labour force variables	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Australia
Civilian population ('000)	6,085.0	4,775.0	3,799.4	1,386.2	2,104.5	419.5	185.5	314.2	19,069.2
Employed persons ('000)	3,608.9	2,881.9	2,351.3	800.2	1,367.2	235.9	127.8	216.9	11,590.1
of which full-time ('000)	2,564.0	1,943.2	1,655.8	530.6	976.0	149.7	105.8	161.9	8,087.0
of which part-time ('000)	1,044.9	938.7	695.5	269.6	391.3	86.2	22.0	54.9	3,503.1
Unemployment rate	5.6%	6.6%	6.4%	6.7%	4.9%	7.1%	5.6%	3.8%	6.0%
Participation rate	62.8%	64.6%	66.1%	61.9%	68.3%	60.5%	73.0%	71.8%	64.7%
of which male	69.5%	71.1%	71.2%	68.5%	75.4%	65.9%	77.3%	76.1%	71.0%
of which female	56.4%	58.4%	61.1%	55.6%	61.1%	55.3%	68.3%	67.7%	58.6%

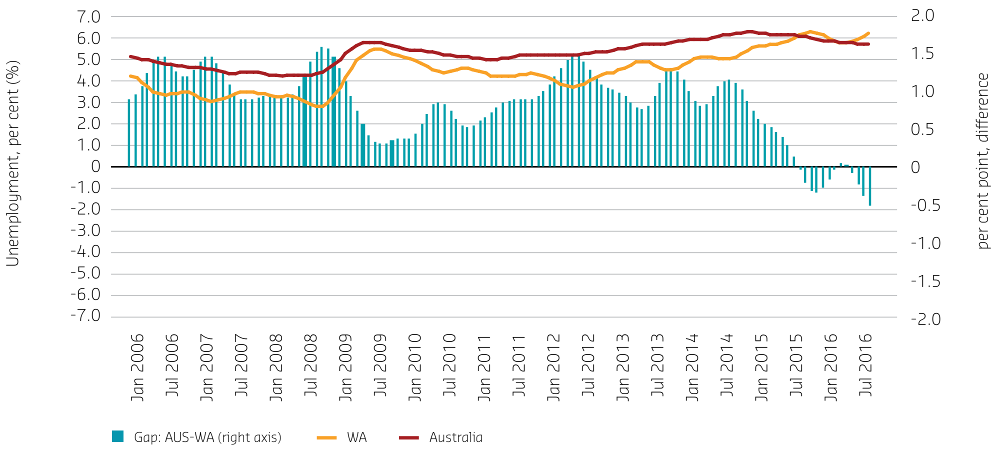
Source: Cassells *et al.* (2014).

Figure 3 **Unemployment rate in WA versus Australia, 2006 to 2016**



Source: Duncan *et al.* (2016)

Figure 4 **State and territory contributions to revised employment estimates**

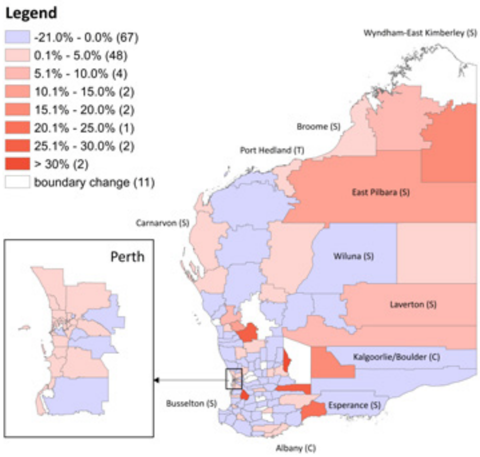


Note: Trend values are used.
Source: Bankwest Curtin Economics Centre (2017) | Australian Bureau of Statistics Cat No 6202.0 and 6202.0.55.003

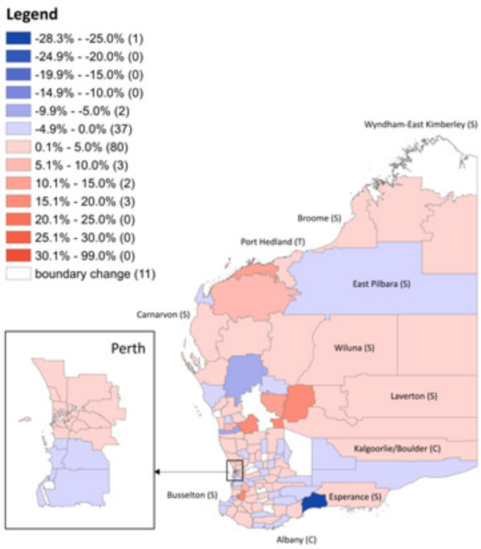
Furthermore, Figure 5 and Figure 6 depict that employment numbers in agriculture are falling for nearly all areas of WA. Agriculture is one of the main industries for rural southwestern Australia and the wellbeing of communities is highly dependent on employment in agribusiness. Diversifying the economy by using a niche tourism strategy building on the strength of high-quality agri-products, unique landscapes and rising global tourism numbers could be a possibility to get employment numbers in the region back on track.

Figure 5 Change in the percentage of the West Australian regional workforce employed in selected industrial sectors, 2006 to 2011

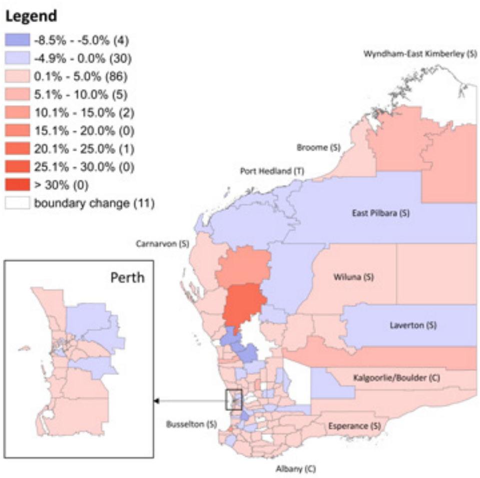
(a) Mining



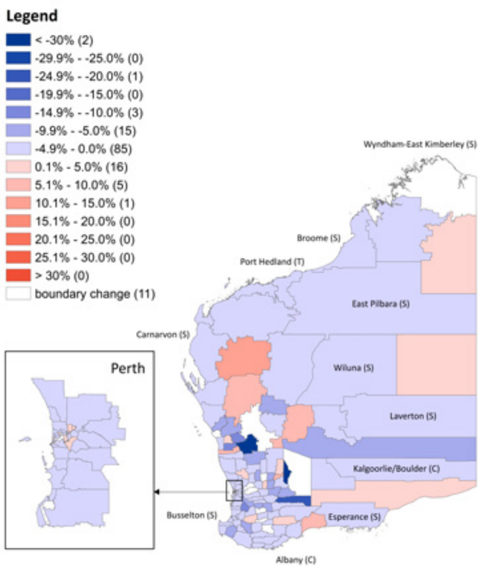
(b) Construction



(c) Education and training



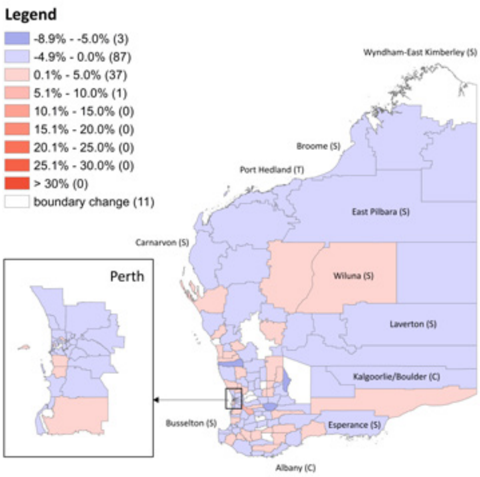
(d) Agriculture, forestry and fishing



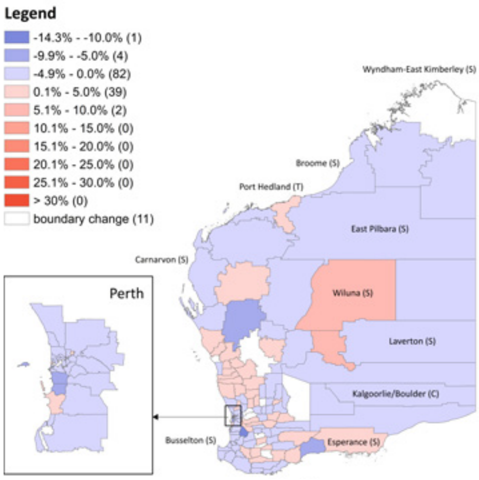
Note: Employment shares for 2006 and 2011 are calculated as the ratio of people employed in each specified industry (ANZSIC 2006 divisions) relative to total employed workforce, by LGA.
Source: Cassells, Dockery, *et al.* (2014)

Figure 5 **Change in the percentage of the West Australian regional workforce employed in selected industrial sectors, 2006 to 2011 (cont.)**

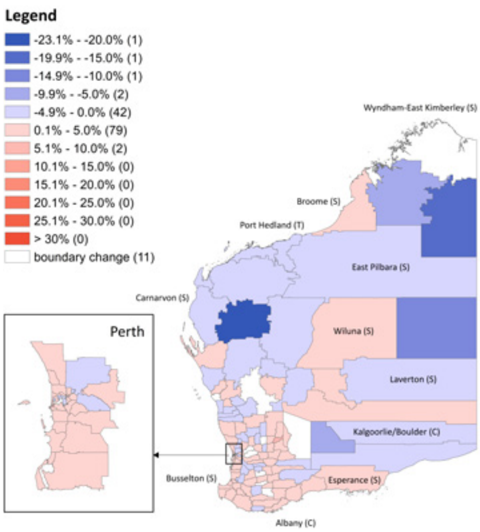
(e) Retail trade



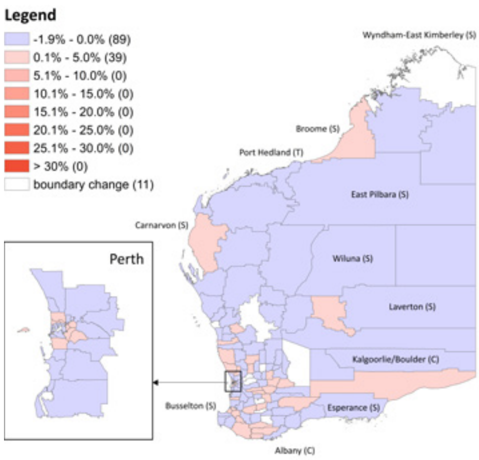
(f) Manufacturing



(g) Health care and social assistance



(h) Finance and insurance services



Note: Employment shares for 2006 and 2011 are calculated as the ratio of people employed in each specified industry (ANZSIC 2006 divisions) relative to total employed workforce, by LGA.
Source: Cassells, Dockery, *et al*. (2014)

Figure 6 Total employment in agriculture, forestry and fishing, by state

Source: Bond-Smith *et al.* (2016)

Western Australia: A vast land

WA is the largest Australian state, with a relatively small population outside of the capital city Perth. With a relatively high cost of air transport domestically and extremely large driving distances to other states and to regional destinations from Perth, internal domestic visitation to Perth and regions is more difficult. Internationally, locations such as Singapore and Indonesia are relatively close, with around four hours flying time, and direct flights that are relatively inexpensive – especially with Singapore's low-cost carrier, Scoot airlines, and Australian low-cost airline, Jetstar.

Tourism WA 2020 is the state-level policy that aligns with the national Tourism 2020 plan in terms of an Asia focus and digital infrastructure (Tourism WA, 2015a). Nevertheless, the state policy focuses marginally on the regional opportunities related to agri-tourism. For instance, the plan aims to increase tourism numbers by ensuring extraordinary regional experiences, including nature-based culinary activities (Tourism WA, 2015a).

Yeoman (2012) suggests there is a desire for new tourism experiences but notes competition among destinations is now global with the advent of the internet, making information more easily available to consumers about new locations, previously inaccessible destinations, travel deals and images to increase tourist appeal for the location.

The desire for new markets and destinations has important implications for regional WA, with its possibilities of diverse offerings of unique local products and experiences in spectacular landscapes. However, unless there is a strategy to overcome and compete with, for example, low-cost airlines and their ability to link travellers to desirable destinations elsewhere in Australia and internationally, ability to access seamless travel to these new destinations and sights, iconic and well-known other competing destinations, such as Sydney, Melbourne and Brisbane, and language barriers, there will remain major challenges to develop niche tourism based on local food production in the south west region of WA.

Trends for the south west region of Western Australia

This research focuses on the south west region of WA. The south west has attributes that would support a focus on agri-tourism as the anchor activity for a niche tourism strategy. Primary industry is a major contributor to economic development, with agriculture, horticulture, livestock and timber being significant industries.

Table 5 summarises the development commission blueprints for agribusiness for the different regional areas of WA. The Great Southern and the South West, the study areas of this research, are both recognised for their high-quality products. While the South West is also acknowledged as a global brand (Margaret River), more marketing efforts would be necessary for the Great Southern to capitalise on the global foodie brand for niche tourism.

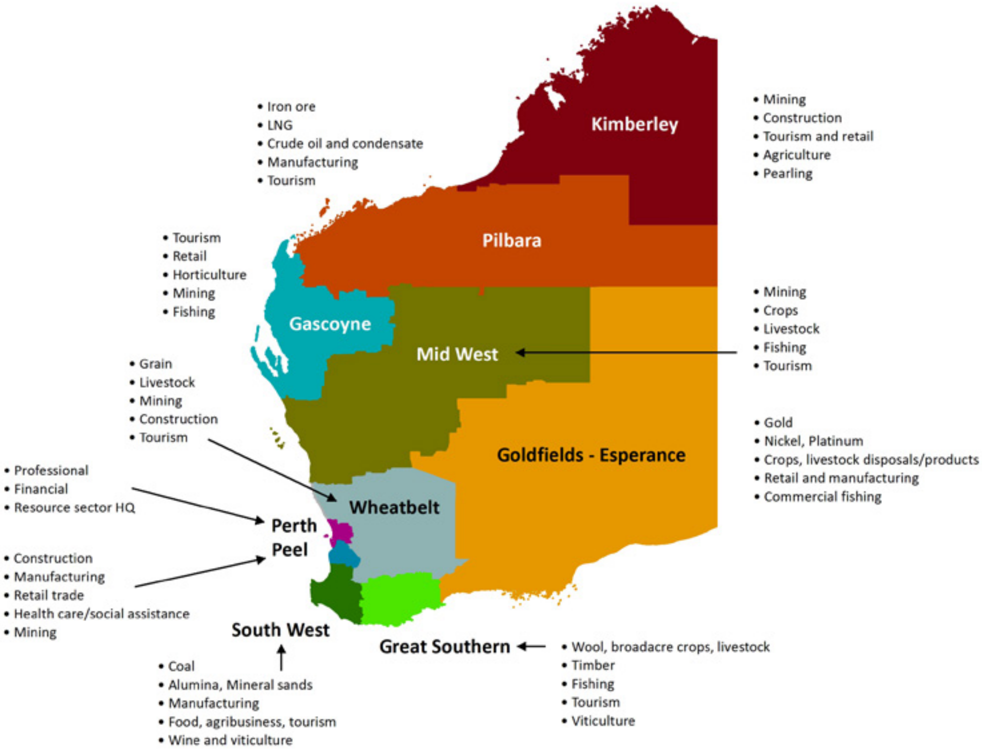
Table 5 WA regional development commission blueprint strategies on agribusiness

Comparative Advantages	Key Challenges
Gascoyne	
• Gascoyne River provides a fertile delta from which the Carnarvon Horticulture District has emerged. 170 plantations covering 1,550 hectares. • Gascoyne Food Bowl Initiative – to increase horticultural land by an additional 400 hectares. Source and deliver an additional 4 gigalitres of water; borefield electrification; land development. • Proximity to developed mining regions, with developed supply chains and infrastructure.	• Port facility to support growth, including live exports. • Lack of IT infrastructure. • Securing renewable energy to support regional development. • Natural disasters and extreme weather events. • Attract migrant workers and develop workforce and skills.
Goldfields – Esperance	
• Mining and agriculture activity has led to high levels of innovation and expenditure on downstream and upstream supply chains. • Natural assets including natural energy sources, biodiversity and coastal assets. • Established global export hub with physical assess including ports and airports.	• Geography impacts on infrastructure and service provision. • Retaining Youth and Aged workers; skill development and retention. • Land lease arrangements. • Access to reliable and affordable energy and water resources. • Weather and rainfall variability.
Great Southern	
• Agriculture main sector (GVA) to the economy. • High and consistent rainfall, means the land is WA's most productive. • Reputation of quality produce. • Strong infrastructure, including port access. • Significant regional supply chains and supporting businesses.	• Labour supply issues: Seasonal labour, coupled with associated lower wages; aging population; retaining youth. • Increasing R&D investment to secure productivity growth. • Drying climate change and competition for potable water sources. • Security of supply of power and water.
Kimberley	
• Key natural resources: Climate, soil and water. • Expansion of the Ord River Irrigation Scheme. • Has attracted large scale foreign investment. • 20,000 hectares currently under/being brought under irrigation, with scope to raise to 60,000 ha. • Favourable Aquaculture fisheries licences. • Significant export ports, positioned well for Asian exports.	• Reliable source of skilled labour. • Securing foreign capital investment to develop required land and water infrastructure. • Access to low cost supply chain. • Greater certainty around land availability and water usage. • Water management and storage to suit climate. • Identify and invest in key R&D to drive efficiency and innovation. • Issues in live cattle exports and consideration of on-shore processing.
Mid West	
• 17.8 million hectares allocated to agriculture. • Excellent soil type. • Diversified across crops, livestock and fishing. • Warm, clean waters for aquaculture and related R&D to commercialise high value niche areas. • Water supply currently exceeds demand. • Reputation – clean and green food quality.	• Growth constrained by supply chain infrastructure and transport networks. • Securing sustainable water and energy supply. • Ensure access to technology to enable efficiencies and productivity growth. • Weather variability and climate change requires ongoing adaptation. • Access to cost effective technology and communications infrastructure. • Develop partnerships for R&D and innovation activity.
Peel	
• Aims to become globally recognised for research capability and premium food production and processing. • Proximity to Perth metropolitan region. • Close to domestic markets and global supply chains; labour; urban centres and support services.	• Urban expansion is a threat to retaining the environmental integrity of the peri-urban area. • Water storage and sourcing alternative water sources. • Alternative energy sources.
Pilbara	
• Underutilised land. • Coastal land and islands – onshore and offshore aquaculture opportunities. • Regional airports. • Extensive regionalised water resources and related quality soils. • Considerable mine dewater and groundwater opportunities. • Extensive transport infrastructure.	• Currently underdeveloped production. • High costs of business due to competing for resources with mining. • Potable water and energy supply. • Policy framework being developed (under WA's Water for Food Initiative) to allow for a more flexible, investor friendly land use tenure. • Unused pearl farm leases.
South West	
• 6,000km^2 land set aside for agricultural use. • Strong export culture. • Diversified farm produce. • Strong reputational brand.	• Increase investment in food processing capacity • Source investment capacity to increase scale of production and supply chain requirements. • Water sources and irrigation efficiency. • Broadband capacity and efficiency. • Difficulty obtaining licences for export to China.
Wheatbelt	
• WA's largest agricultural producer. • Diverse food production and processing services sector. • Proximity to major infrastructure. • Knowledge and training networks in agriculture, fishing, aquaculture and horticulture, enables harnessing new technology and drive productivity. • Capability to export knowledge products in agriculture and related industries. • Niche manufacturing businesses focussed on agriculture.	• Increasing productivity by identifying and achieving greater efficiencies, innovation and technological adaptation across the supply chain. • Energy and water supply solutions to meet sector growth. • Utilise 'knowledge economy' to drive efficiency and productivity growth. • Mitigating for climate change. • Dependency on casual workforce. • Attracting private investment.

Source: Bond-Smith *et al.*, (2016).

Figure 7 clearly shows that agriculture and tourism are two major industries for the south west, especially for the selected case regions of the South West and Great Southern.

Figure 7 The regions of Western Australia and principal industries



Note: Principal industry identification from the Regional Development Commissions.
Source: Duncan, Leong and Taverdi (2015).

Interestingly, looking at employment data, while agriculture is a major employer for both regions, tourism (as part of ´accommodation and food services´ and ´arts and recreation services´) has only significant employment numbers for the South West but not the Great Southern (Table 6).

Table 6 Regional WA workforce by industry, 2011

Employment by industry (number)	Gascoyne	Goldfields-Esperance	Great Southern	Kimberley	Mid West	Peel	Perth	Pilbara	South West	Wheatbelt	Other	WA
Agriculture, Forestry and Fishing	414 3	1,239 11	3,396 1	647 10	1,892 6	838 11	3,491 20	185 17	3,684 7	7,825 1	2,528 14	26,139 15
Mining	231 9	7,939 1	56 20	1,540 3	2,722 1	1,838 7	24,535 12	18,469 1	1,508 13	1,059 10	9,990 2	69,887 7
Manufacturing	181 10	2,065 3	1,544 5	347 13	1,212 9	3,858 2	63,839 5	1,449 7	7,476 1	1,530 7	6,161 5	89,662 4
Electricity, Gas, Water and Waste Services	65 15	238 18	248 16	170 18	210 18	243 19	8,597 18	455 16	1,188 15	399 15	824 17	12,637 19
Construction	299 7	2,012 4	1,326 7	1,309 5	2,033 4	2,969 4	56,115 6	8,370 2	6,787 3	1,770 6	29,684 1	112,674 1
Wholesale Trade	78 14	810 13	598 12	183 16	612 13	534 15	30,579 10	621 14	1,487 14	943 11	2,240 15	38,685 12
Retail Trade	407 4	2,215 2	2,642 2	1,132 7	2,320 2	4,009 1	79,742 2	1,381 8	7,425 2	2,359 3	6,065 6	109,697 3
Accommodation and Food Services	455 1	1,642 7	1,301 8	1,266 6	1,522 8	2,315 6	42,675 8	2,485 3	4,577 6	1,321 8	4,604 8	64,163 9
Transport, Postal and Warehousing	259 8	1,536 9	790 9	846 9	1,180 10	810 12	31,721 9	2,310 4	2,101 11	1,244 9	6,822 3	49,619 10
Information Media and Telecommunications	20 20	155 20	147 19	161 19	135 19	216 20	9,396 17	105 20	500 20	103 20	764 19	11,702 20
Financial and Insurance Services	22 19	308 16	350 14	106 20	327 16	406 17	23,917 13	151 18	975 17	440 14	799 18	27,801 14
Rental, Hiring and Real Estate Services	59 16	432 15	306 15	214 14	364 15	602 14	14,335 15	702 13	1,145 16	181 18	706 20	19,046 16
Professional, Scientific and Technical Services	115 13	870 12	784 10	372 12	747 12	1,009 10	67,211 3	1,358 10	2,478 9	589 13	3,494 10	79,027 6
Administrative and Support Services	130 11	620 14	402 13	521 11	545 14	767 13	21,559 14	1,380 9	1,516 12	373 16	6,260 4	34,073 13
Public Administration and Safety	448 2	1,594 8	1,532 6	1,401 4	1,533 7	1,567 8	50,929 7	1,346 11	3,144 8	1,845 5	3,017 12	68,356 8
Education and Training	323 5	1,890 6	2,097 4	1,743 2	2,033 4	2,631 5	64,606 4	1,529 5	5,156 5	2,544 2	3,127 11	87,679 5
Health Care and Social Assistance	302 6	1,895 5	2,474 3	1,891 1	2,174 3	3,191 3	85,108 1	1,456 6	6,133 4	2,294 4	5,719 7	112,637 2
Arts and Recreation Services	37 18	183 19	189 17	199 15	126 20	470 16	11,757 16	109 19	505 19	138 19	978 16	14,691 17
Other Services	118 12	1,372 10	776 11	973 8	885 11	1,170 9	29,010 11	1,097 12	2,385 10	937 12	3,900 9	42,623 11
Inadequately described	42 17	244 17	163 18	182 17	218 17	268 18	7,849 19	481 15	560 18	229 17	2,719 13	12,955 18
Not stated/applicable	5 21	11 21	11 21	23 21	8 21	18 21	309 21	27 21	12 21	15 21	189 21	628 21
Total	**4,010**	**29,270**	**21,132**	**15,226**	**22,798**	**29,729**	**727,280**	**45,466**	**60,742**	**28,138**	**100,590**	**1,084,381**

Note: Data are aggregated from the LGA level on a place of work basis. Other includes the categories 'No fixed address' and 'State/Territory undefined'.
Source: Duncan, Leong and Taverdi (2015).

The regional cases: The South West and the Great Southern

The research study specifically focused on two regional development areas in WA's south west, the: South West and Great Southern. As Table 7 depicts, the South West is more densely populated when compared to the Great Southern. However, the key difference is the value of agricultural and tourism sectors. Tourism contributes over a billion dollars to the South West economy, whereas it is agriculture that makes a similar contribution in the Great Southern economy. It is in this context that the potential of 'niche' agri-tourism in both of these regions – not only to enhance economic growth but also foster regional and rural wellbeing – cannot be overlooked.

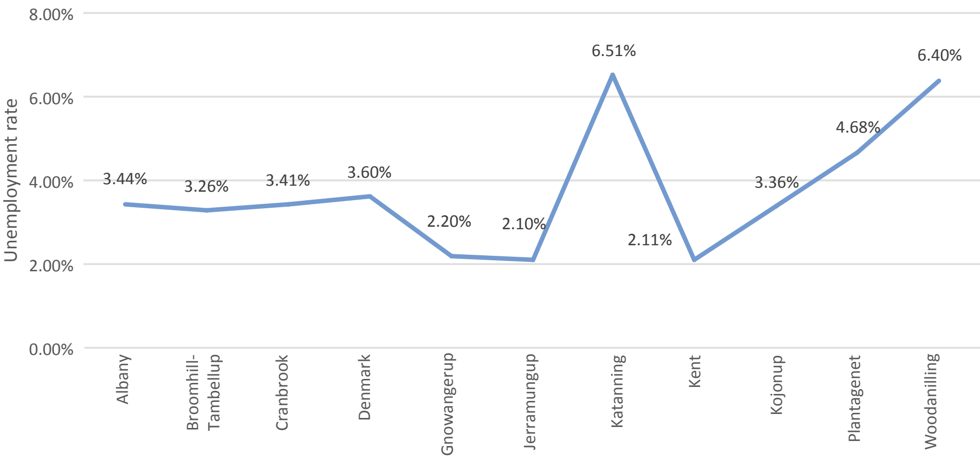
Table 7 Key indicators of two regions

Country	Great Southern	South West
Number of LGAs	11	12
Population	60,000	170,000
Area (sq. km.)	39,007	24,000
Unemployment rate	5.30%	5.40%
Economy (billions)	4	15
Agricultural sector (millions)	1,041	615
Tourism sector (millions)	293	1,054
Overnight visitors (millions)	0.45	1.5
Tourism expenditures (millions)	237	800

Source: Great Southern Development Commission (GSDC) (2015), South West Development Commission (SWDC) (2014).

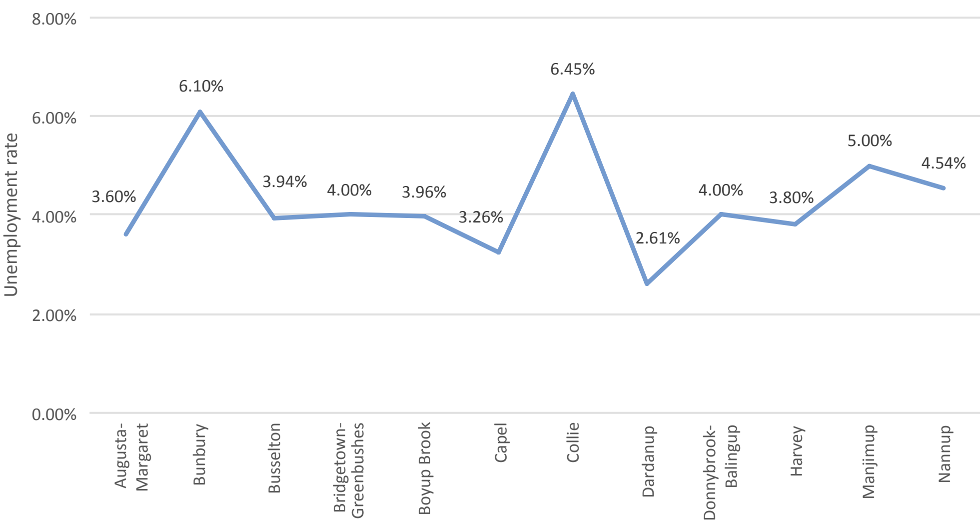
The ability to harness these opportunities is particularly imperative in the current economic climate of WA. The forecasted gross state product (GSP) of 1.25 per cent for 2016–2017 was the lowest in over a decade (WA Department of State Development, 2016) and the WA Treasury (2017) predicted that the unemployment rate would rise to around 6.5 per cent until 2018 before it starts to decline. Indeed, unemployment in WA hit a 16-year high in March 2018, at 6.9 per cent, before it started recently to decline (Laschon, 2018; Wright, 2018), and the GSP for 2016–2017 was even lower than predicted and actually fell by 2.7 per cent (Department of Treasury n.d.). Although both regions have unemployment rates of well below the state rate, ABS (2017) data shows that some Local Government Areas (LGAs) within these two regions have unemployment rates similar to that of WA (Figure 8 and Figure 9).

Figure 8 Unemployment rate of LGAs in the Great Southern



Source: ABS (2017).

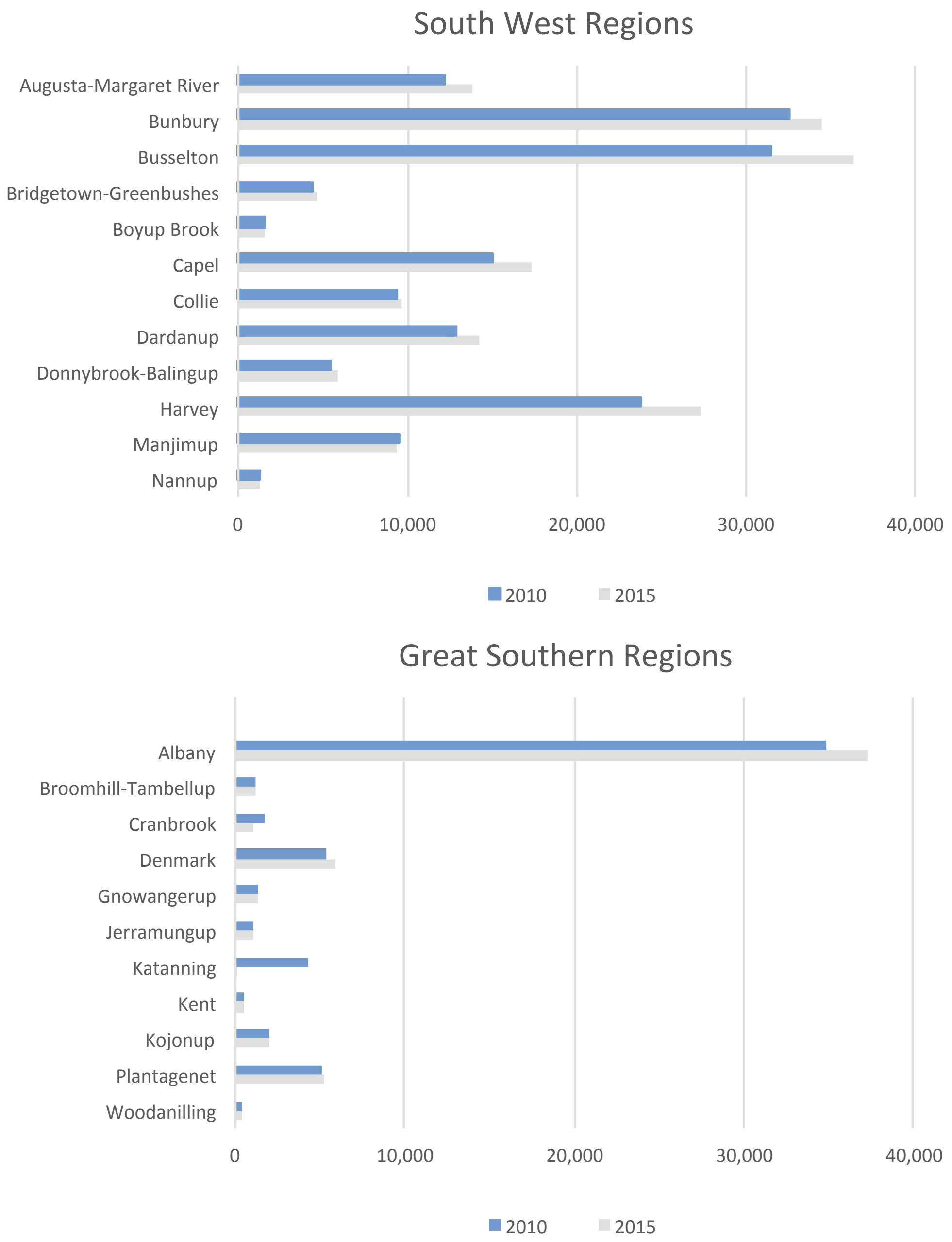
Figure 9 Unemployment rate of LGAs in the South West



Source: ABS (2017).

Both regions are doing reasonably well in terms of population growth in overall numbers. The ABS data backs up contention that most LGAs are growing, albeit with a small increase (see Figure 10). The rationale behind the choice of regional case studies is based around the identified SuperTowns and the possible impact on regional development if a niche tourism perspective is brought to bear on the overall agenda for economic and social development.

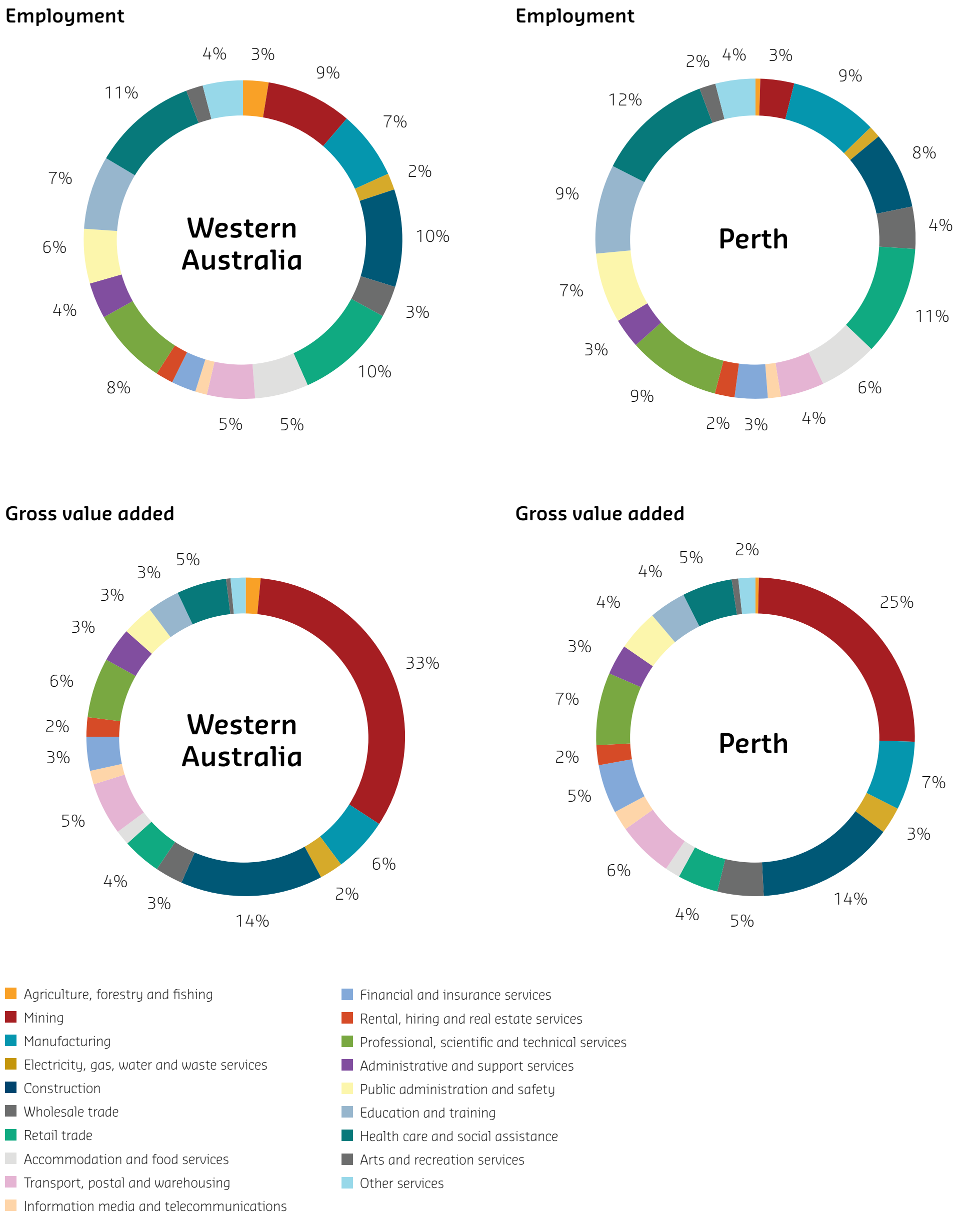
Figure 10 Population change across LGAs in the South West and Great Southern



Source: ABS (2017).

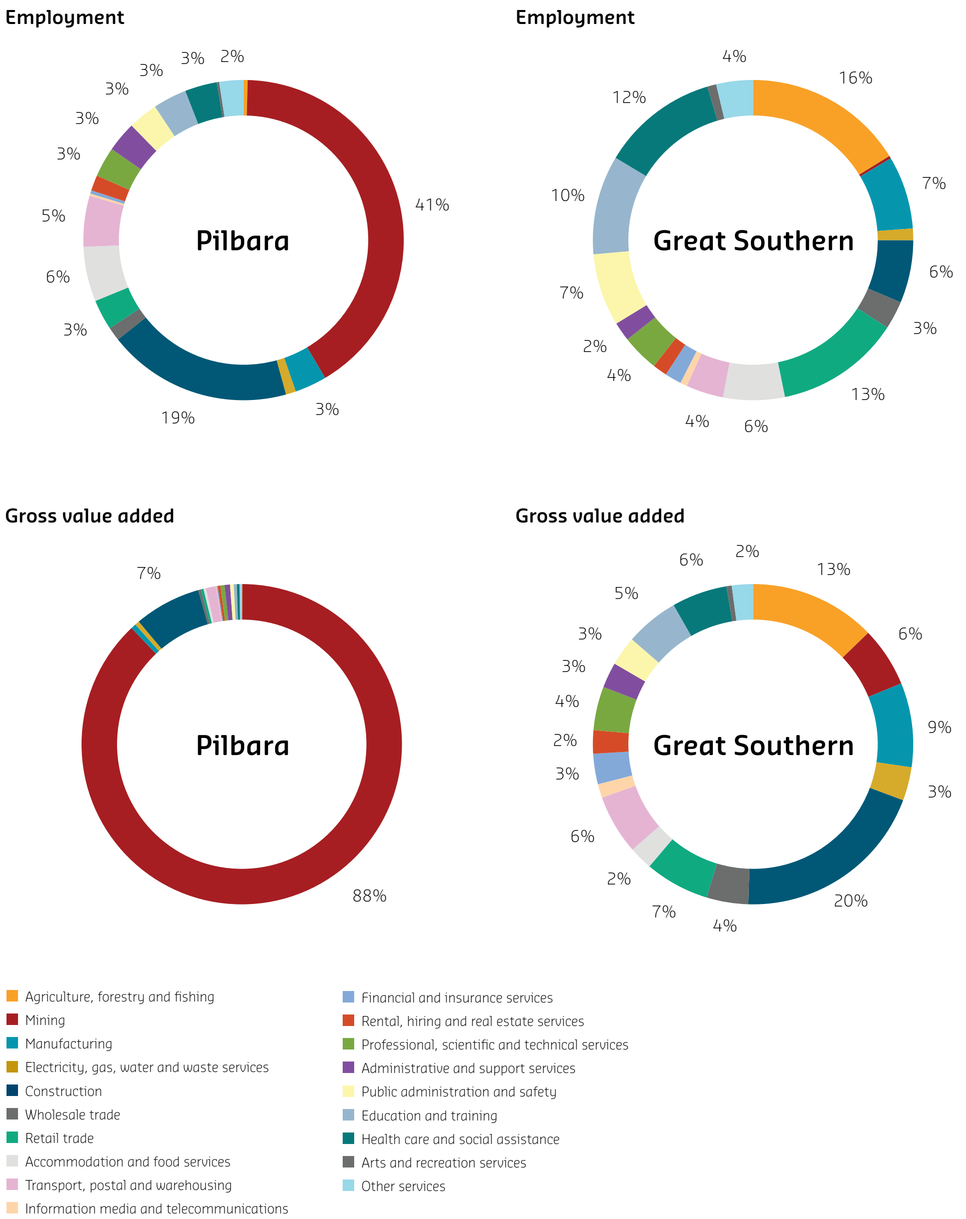
Figure 11 shows that agriculture is a much bigger employer for the Great Southern than for the rest of WA. Nevertheless, as seen earlier, employment numbers in agriculture are declining but are paramount for the wellbeing of regional and rural areas. The question is, whether or not niche tourism could be a strategy to build on the existing strength by adding value, opportunities and employment?

Figure 11 Workforce distribution and economic value of Western Australia and selected regions



Note: Data for Western Australia are for 2012-13. Data for the three regions are for 2011. Industry gross value added uses current price data.
Source: Cassells *et al.* (2014).

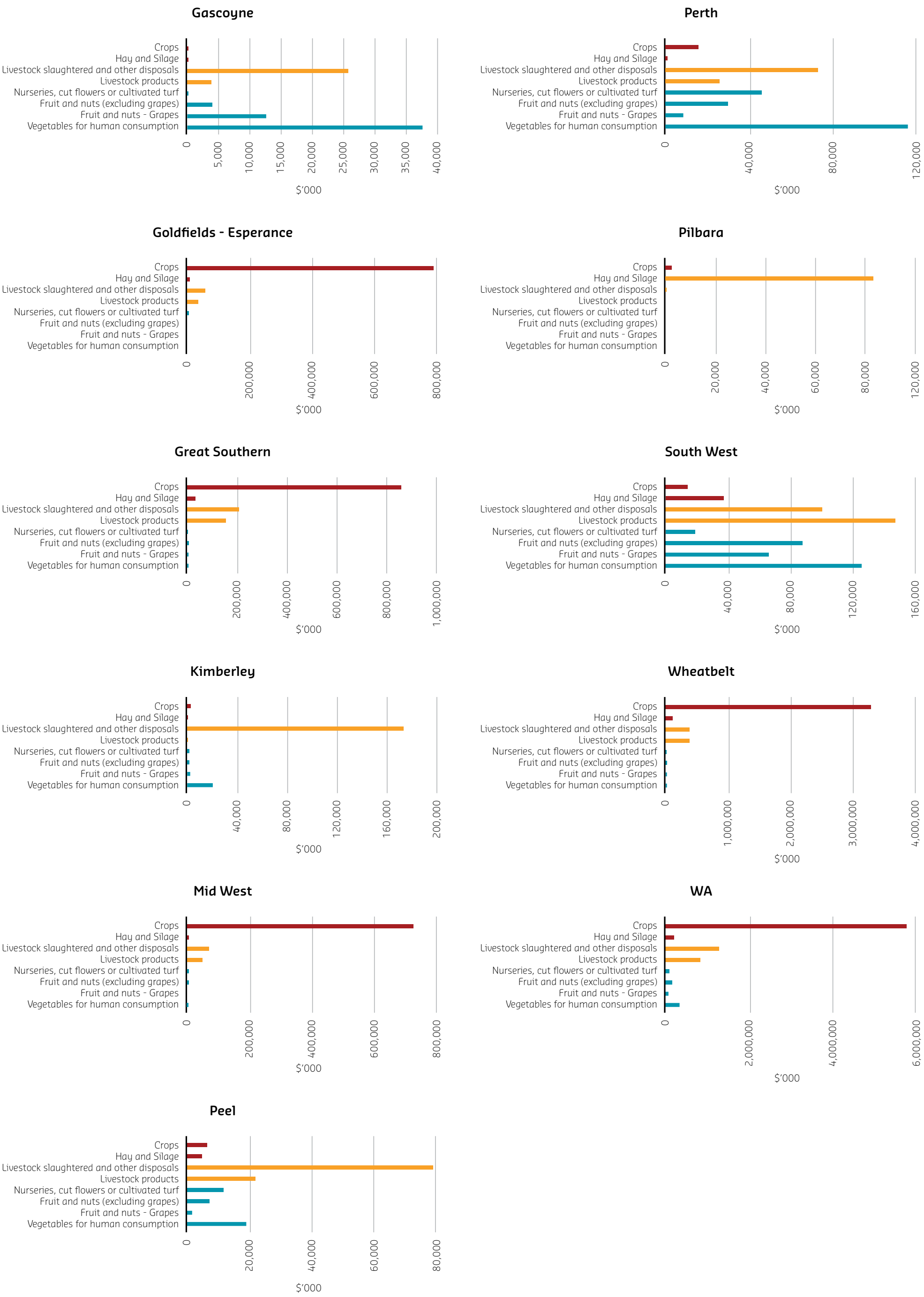
Figure 11 Workforce distribution and economic value of Western Australia and selected regions (cont.)



Note: Data for Western Australia are for 2012-13. Data for the three regions are for 2011. Industry gross value added uses current price data.
Source: Cassells *et al.* (2014).

Figure 12 shows interesting differences in the agricultural production of the two regions. The South West has a much more diverse portfolio than the Great Southern. This finding has important applications, as a niche tourism strategy would need to make use of existing elements. Having different characteristics in agricultural production also means that, while both strategies would be based on a niche agri-food strategy, the specific strategies for the two regions have to be distinctive.

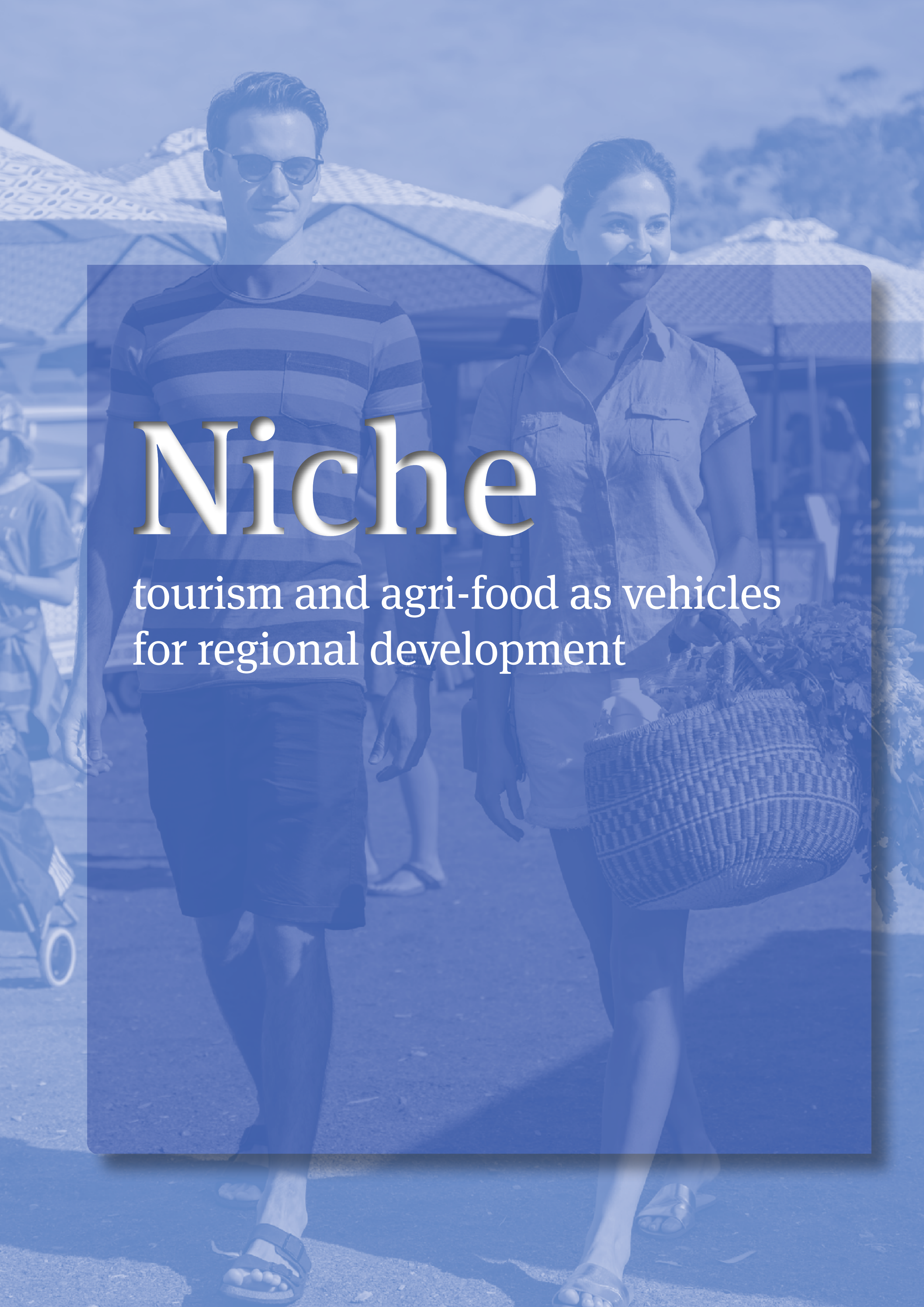
Figure 12 Regions of WA – Gross value of agriculture production, 2013-14



Source: Bond-Smith *et al.* (2016)

Niche

tourism and agri-food as vehicles for regional development



Defining niche tourism

Niche tourism is the province of small-scale tourism operators and relies on stakeholder relationships being realised in tandem with business operations (Novelli and Benson, 2005). Niche tourism inhabits the territory that is not 'mass tourism' based on mass-market offerings of packaged tours for large-scale consumption of tourist destinations (Robinson and Novelli, 2005).

It has as its focus a segmented tourist market that comprises sophisticated tourism offerings and experiences, often built in response to environmental and socio-cultural preservation and to attract tourists who are prepared to spend more for unique experiences. Robinson and Novelli (2005) support a broad definition of niche tourism in its sense of 'special interests, culture and/or activity-based tourism involving [a] small number of tourists in authentic settings' and suggest that niche tourism is then differentiated into micro-niches of specific cultural, urban, environmental, rural and other special interest events and activities.

Key to supporting niche tourism allied to food are the cultures and landscapes that produce the food. Niche tourism based on agri-food locates tourism in both unique geographical spaces as part of the food-production cycle, but it also requires consideration of a value chain that incorporates local food experiences into restaurants, cafes and supermarkets in the region. Interview participants confirmed the academic view of finding a competitive advantage and building on the green, clean image of the South West and its unique landscapes:

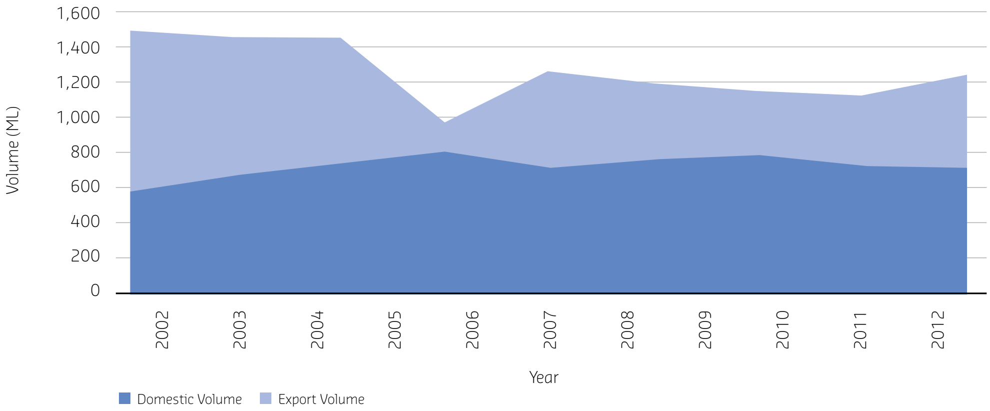
> *... tourism, of its own right, I believe, is a sustainable way to go for us, our small region, what we've got to do is to try to hook onto what is happening in other parts ... first of all, identifying what sets us apart, what's the difference? What's our point of difference? People will be talking about an icon, we're not too sure that one single icon is what we want, and what is the icon? We've talked a lot about is it the environment that's our icon, and then build into that environment pursuits for people to do ... (SW_BG_C_22)*

Yeoman (2012) argues that, as a result of climate change and shifting weather patterns, allied with a concomitant strain on water resources and diminishing available agricultural land, food tourism will arise as the 'new luxury'. This prospect offers an important vehicle for establishing premium, local food as the anchor activity for regional development through niche tourism in the south west regions of WA.

Hall and Mitchell (2001) acknowledge that food and wine are the mainstay of rural tourism and conclude that niche tourism relying on food requires giving attention to a broader, high-interest focus on restaurants, wineries and festivals in contexts such as gastronomic tourism, cuisine tourism and culinary tourism.

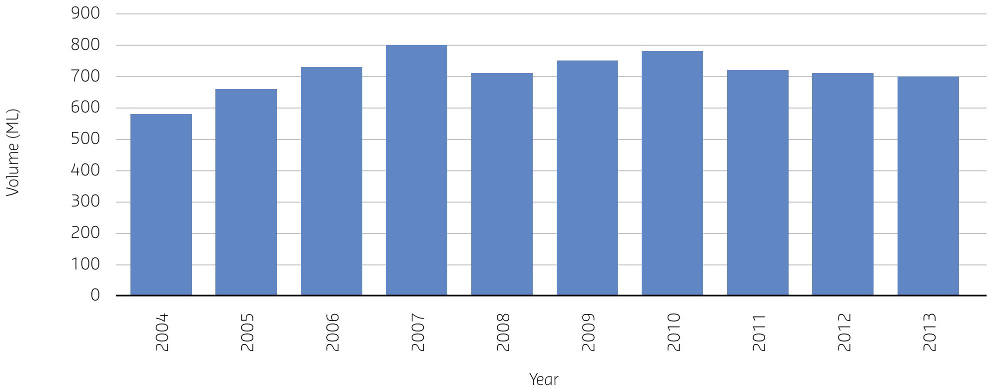
Figure 13 to Figure 16 show that Australia has a significant wine industry; wine is a major export commodity. Niche tourism can build on these already established markets, targeting tourists from the main export markets in the first instance.

Figure 13 Australian wine export and domestic volumes



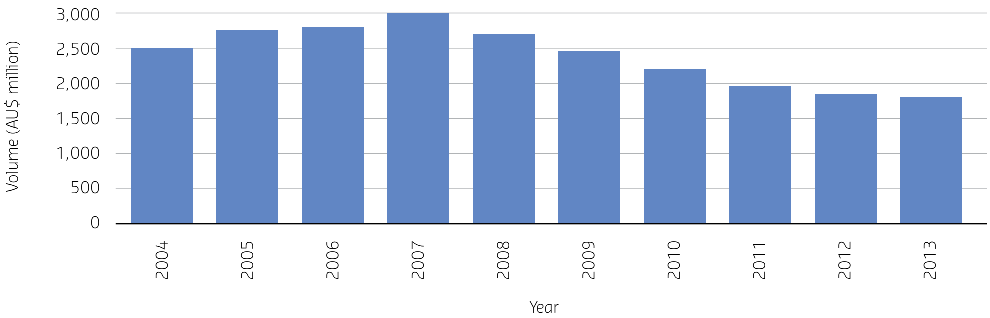
Source: Galbreath *et al.*, (2016).

Figure 14 Australian wine export volume



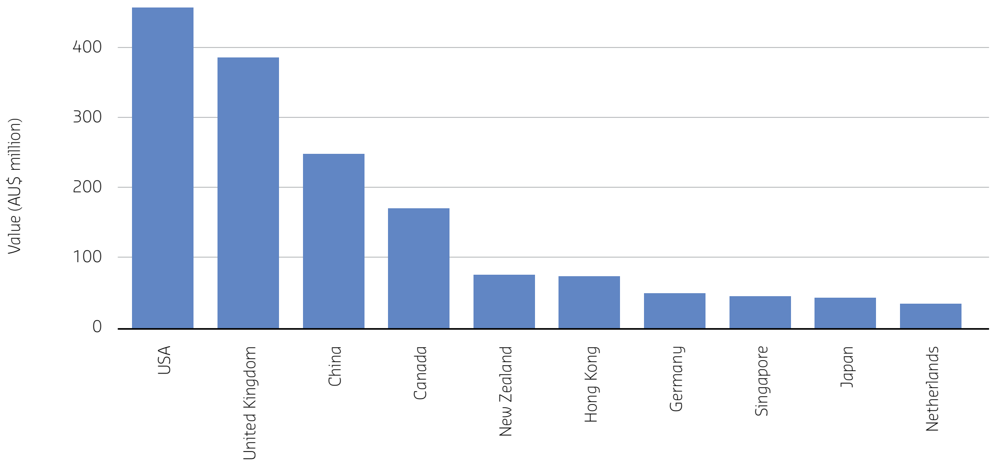
Source: Galbreath *et al.*, (2016).

Figure 15 Australian wine export value



Source: Galbreath *et al.*, (2016).

Figure 16 Australia's top export wine markets by value



Source: Galbreath *et al.*, (2016).

A range of tourism activities can be included in a niche tourism strategy based on food, such as: food tourism visitation to primary and secondary food producers, food festivals, local restaurants, and visits to specific locations for which food tasting or specialist food production are part of a suite of activities in gastronomic tourism in relation to experiential tourism (Hall and Mitchell, 2001) that establishes higher value-added products in the tourism sector.

The question is, however, if there are also pull factors to the local landscapes that produce these goods. Spectacular, unique landscapes can be attractors for tourists wanting to understand food provenance and the locales in which premium produce is grown. Furthermore, as discussed earlier, these regions need to be accessible and inviting to tourists, and regional strategies need to support a unique niche tourism strategy.

Agri-tourism as a mechanism for regional economic development of the South West and the Great Southern?

The tourism sector has been considered a vital component of regional sustainable development strategies in WA and is closely aligned with other key focus areas, such as investment attraction, export development, strategic land development and economic growth. This recognition is particularly significant as it has often been suggested that sustainable development initiatives in countries like Australia are likely to be more effective at the regional scale because regions are large enough for federal and state authorities to deal with, yet small enough to allow local communities and councils to participate in the decision-making process (Dhakal, 2012). The potential of innovative tourism entrepreneurship to foster regional sustainable development cannot be overlooked, as many of the niche tourism businesses are located in regional areas. Supporting innovative niche tourism businesses is critical if regional tourism is to expand and sustain over time. It is in this context that Leximancer software was used to analyse key tourism-related polices at the regional and shire level, with the purpose of mapping broader themes within the textual data. The outputs are presented and discussed below.

Regional strategies: South West and Great Southern

In order to analyse the regional- and shire-level policies Leximancer was used to analyse key tourism-related polices at the regional and shire level, with the purpose of mapping broader themes within significant publications developed by local government.

The main benefit of automated versus manual thematic analyses is that the latter is often subjected to various limitations including, but not limited to, time, human coding and biased interpretation. Leximancer uses its own algorithms to analyse the meanings within passages of text by extracting main themes and concepts, which are then used to create an automated coding scheme to discover the frequency and co-occurrence of important concepts (Mahmood *et al.*, 2014).

Collins (2005) emphasises the significance of content analysis of various policy documents in order to identify gaps and propose credible recommendations. Dhakal, Mahmood and Bogati (2017) contend that although a variety of qualitative techniques are available to categorise the content of textual data, the analyses are more consistently evaluated for underlying meanings with automated software coding. This research used Leximancer-based automated content analysis of tourist-related policies relevant in the context of the project's scope. The usage of Leximancer software offers a quantitative approach to visualise qualitative analysis of textual data (Dhakal, Mahmood and Bogati, 2017). The software identifies themes and concepts based on the word frequency and co-occurrence of families of terms, and generates meanings within passages of text by extracting main themes based on the most prominent concepts in a cluster of concepts (Smith and Humphreys, 2006).

The themes are displayed in heat maps to show the level of importance, meaning the most important theme appears in red (hottest) and the next hottest in orange and so on, according to the colour wheel (Leximancer, 2011). In addition, the visual representation of theme size is based on the number of 'concepts' grouped underneath each theme (Leximancer, 2011). In order to maintain consistency, the same output setting (Theme 50%, Concept 100%) was used in Leximancer to capture thematic maps. Four categories were used to classify the importance of themes based on the connectivity values generated by Leximancer (Mahmood *et al*., 2014):

a) Most important (75% and higher).

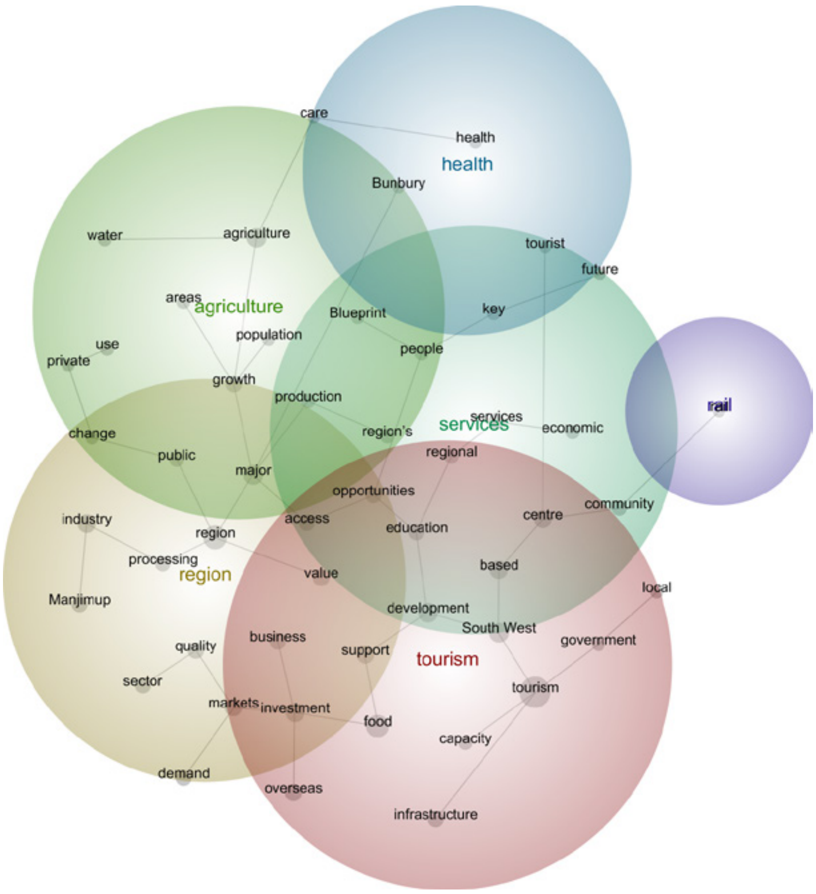
b) Important (between 50% and 74%).

c) Moderately important (between 25% and 49%).

d) Slightly important (between 1% and 24%).

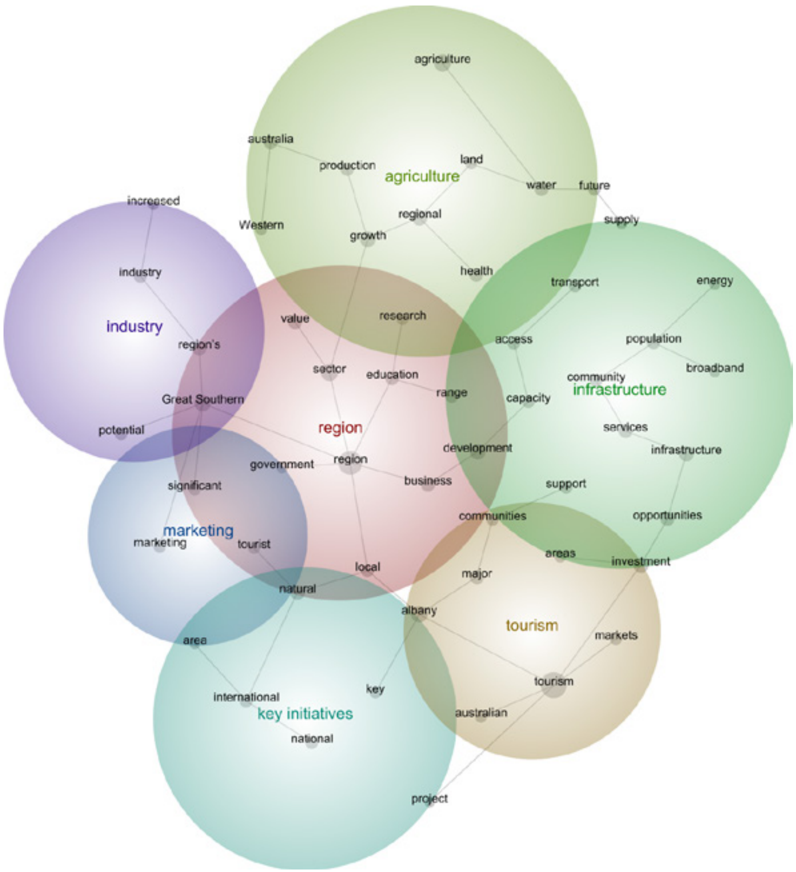
Figure 17 and Figure 18 depict the Leximancer-generated thematic maps relating to the two regional blueprints.

Figure 17 **Thematic map of the South West Regional Blueprint**



Source: Bankwest Curtin Economics Centre | Authors' Leximancer analysis.

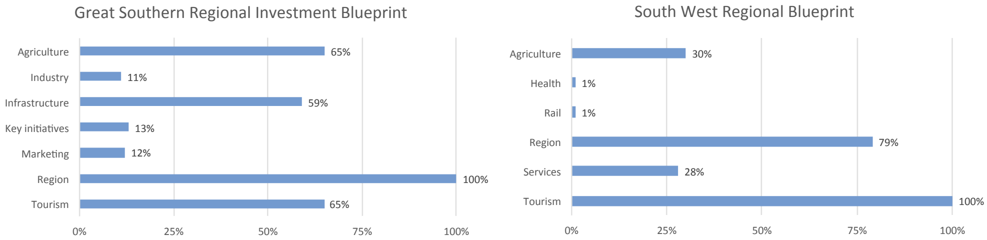
Figure 18 **Thematic map of the Great Southern Regional Blueprint**



Source: Bankwest Curtin Economics Centre | Authors' Leximancer analysis.

The regional focus on agriculture and tourism is reinforced in the map through the proximity and thematic overlaps. The analysis of theme connectivity values within the Leximancer maps revealed similarities and differences between regions (see Figure 19). On the one hand, 'tourism' was the most important (100%) theme for the South West, compared to important (65%) for the Great Southern. This is not surprising, as the tourism sector is much more developed in the South West when compared with the Great Southern, where agriculture/horticulture is the primary economic driver.

Figure 19 Connectivity values of thematic importance within regional blueprints



Source: Bankwest Curtin Economics Centre | Authors' analysis.

On the other hand, 'tourism' and 'agriculture' were both equally important for the Great Southern. In addition, the region was most important (100% and 79%) for both the Great Southern and South West. A regional focus on agriculture and tourism within the South West Regional Blueprint is reinforced in the mapping through the proximity and thematic overlaps. For instance, the South West Regional Blueprint states:

> *"... regional business competitiveness is based on exploiting niche markets for premium quality goods as the region has insufficient large-scale industries to compete in high volume low margin sectors. Focusing on premium quality helps to overcome the cost disadvantage of geographic isolation and transport logistics and in the case of agriculture, relatively small individual land holdings." (SWDC)*

While there is clearly an overlap amongst three themes – tourism, services and regions – there is barely any overlap between the two themes of agriculture and tourism. This broadly suggests a disconnect between the agricultural and tourism focus within the South West strategy. This is even more apparent when one looks at the heat map of the regional strategy of the Great Southern (Figure 18). Potential to drive a niche tourism strategy though agri-food, then, could require institutional support.

Nevertheless, the Great Southern Investment Blueprint states:

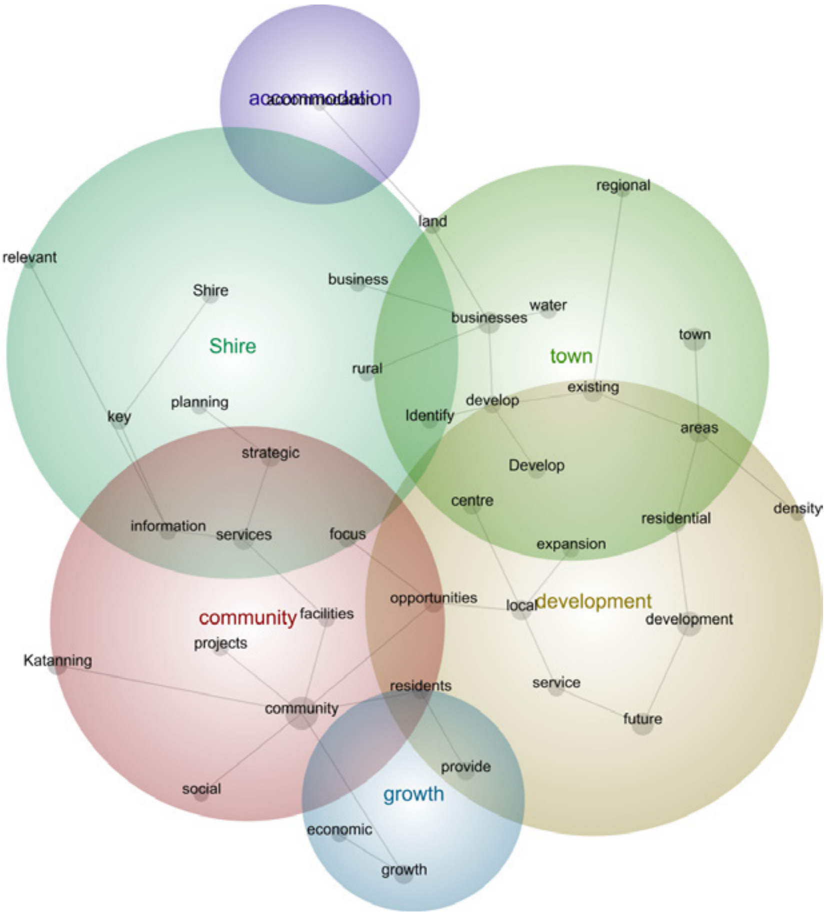
> *"... wheat and livestock markets can be the obvious beneficiaries, but so too could be aquaculture, agri-tourism and niche high value products. With the region's access to Asian and global markets through the Port of Albany, the Great Southern region has the potential to capitalise on these trends and to expand, diversify and add value to food production." (GSDC)*

While both regional strategies discuss agriculture and tourism and also make some references to the possibility to combine both, a coherent strategy for a niche tourism strategy based on agri-food is absent. A look at shire-specific policies revealed even more interesting implications for a possible niche tourism strategy.

Shire development policies of two supertowns: Manjimup and Katanning

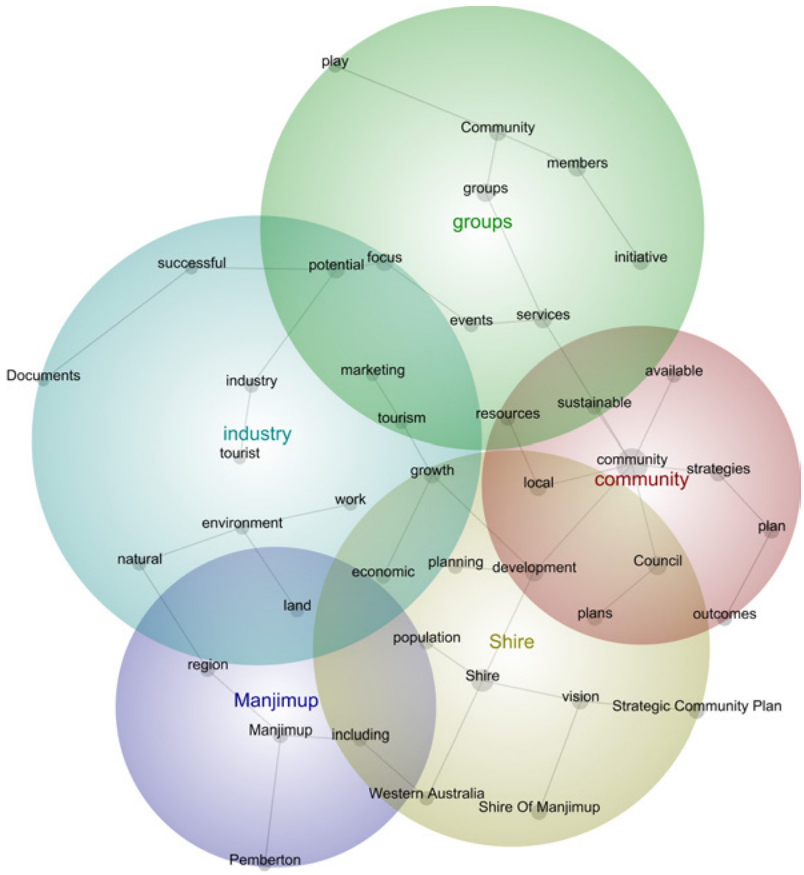
Shire-specific development policies focusing on community and growth are reinforced in the map through the proximity and thematic overlaps. The analysis of connectivity values of themes within the Leximancer maps revealed some differences within the community plans (Figure 20 and Figure 21). First, 'community' was the most important (100%) theme for both shires. 'development' and 'growth' were the main focus in Katanning, whereas 'industry' was the primary focus in Manjimup. For instance, one of the prosperity strategies of the Manjimup Shire plan states: 'strengthen and diversify our core industries, including agriculture, forestry and tourism' (Shire of Manjimup, 2015). This is interesting, as a closer look at the concepts reveals that the tourism industry is a separate priority for Manjimup, whereas it is a community-development-related issue for Katanning. Accordingly, the Shire of Katanning (2013) aims to develop a Tourism and Marketing Strategy and a Market Prospectus outlining economic and social opportunities.

Figure 20 Katanning Community Plan 2013 to 2023



Source: Bankwest Curtin Economics Centre | Authors' Leximancer analysis.

Figure 21 Manjimup Strategic Community Plan 2015 to 2020



Source: Bankwest Curtin Economics Centre | Authors' Leximancer analysis.

The Leximancer findings indicate that there is a synergy, at least in the policy and planning documents, between regional and community priorities to harness agri-based tourism opportunities. This priority aligns well with the newly developed TASTE 2020 (Tourism WA, 2015b) strategy, which aims to develop new initiatives to elevate the tourism, wine, agricultural and fishing sectors in WA.

Combining tourism and agriculture: An economic alternative for south west Western Australia?

The interviews in the shires of Manjimup, Nannup, Bridgetown-Greenbushes and Boyup Brook in the South West and Katanning, Kojonup, Cranbrook and Gnowangerup in the Great Southern, as well as two interviews with state departments in Perth, delivered rich data on the subject of combining tourism and agriculture for regional economic development. The transcribed interviews were analysed by identifying common themes. Major themes included impediments, such as:

- distance to Perth;
- geographic borders;
- missing infrastructure;
- lack of coordination and collaboration;
- marketing;
- no guidance and support for entrepreneurial ideas;
- competing against ocean and beach tourism;
- regulation;
- scale; and
- farmers not having enough time for tourism.

However, interviewees were also able to identify opportunities, such as:

- using bushfood for a niche tourism strategy;
- building on the clean and green image;
- developing more farm stays and farm visits; and
- opening-up of new tourism markets in the area of boutique premium food in response to the question of combining agriculture and tourism.

Participants in both regions widely supported the idea of diversifying the economy through tourism, as evidenced by the following quotes:

> *Absolutely, I think we have to head in that direction to build that diversity back into our economy ... looking at the broader South West region I think we really need to do that ... I think we really need to embrace that and grow that link between agri and tourism and really build up the local economy. (SW_B_G_46)*

> *The scale of agriculture now is on a world scene and unless we can compete on a world market agriculture will never be the industry that it was in these small little country towns. So something like tourism here has had an opportunity to not fill that gap totally but [it can] certainly be an industry that can grow and bring, I suppose, dollars in from outside the economy. (SW_BG_F_49)*

Nevertheless, people in the South West were more open to embracing tourism than in the Great Southern. This is in line with the more expansive tourism offer in the South West and a regional strategy that supports tourism on a bigger scale than in the Great Southern. Different participants from the Great Southern stated that they realised that some people have difficulties imagining a vibrant tourism industry for the region, as evident in the following quote:

> *I don't think people have looked at the potential of food and tourism here at all, so you would have to show them a film or a movie or take them somewhere where they could see opportunities, you know you can't build a dream or have a vision about something if you don't know what's out there, and they don't know what's out there. (GS_G_C_41)*

These findings indicate that greater governmental support and lobbying would be necessary for local resident buy-in for a big-scale niche tourism strategy on agri-food. While regular calls for regional grants exist, it was found that often people in the region were not aware of this.

The thematic analysis also revealed major opportunities, such as building on the clean and green image of WA, exploring the possibilities to build on Indigenous and bushfood tourism – especially in the Great Southern – opening-up of new tourism markets by diversifying the offer, and increasing farm-stay possibilities and offering working-farm experiences.

Is 'clean and green' the competitive advantage for the south west?

During the interviews and at a local conference, participants debated that a possible niche tourism strategy would be to build on the 'clean and green image' of WA, not only for marketing the local produce but also in terms of tourism. Nevertheless, it was questioned if it would be enough as a pull factor to get large numbers of tourists to drive long distances. Furthermore, it was disputed that there are already iconic clean and green tourist areas in other parts of Australia that have already marketed their regions in this space, including Tasmania and northern New South Wales. The following quotes from participants will give the reader a deeper insight into the thought process of regional participants:

> *The region offers, its core strengths I think are the natural attractions, the actual environment, the clean, green, unpolluted environment, there's a lot of wilderness experience that people can have here, it's quite different to some other areas in the State … (GS_A_G_45)*

> *… I think what's really important from a broader scale, even beyond … for the Great Southern, is that we're known as clean green – not necessarily green – but it's that [it's] grown naturally, it's fresh, it's – we're very fortunate in this country with our agriculture and so forth that people know that you get fresh produce, like Roma's tomatoes, and everything tastes better. (Joint interview: GS_KP_C_43/ GS_KP_A_53)*

While, in general, the idea of niche tourism based on agricultural products was welcome, numerous times concerns were raised about tourists bringing diseases to the farms and, as a result, destroying the clean and green image of WA if unregulated visits took place – especially for the big business farms in the Great Southern, for example:

> *One of the unique risks I think for premium foods is ensuring quality control so that you maintain your, your position of, of preference. As I said, we have a very unique biosecurity environment in Western Australia, but if you had an outbreak of foot and mouth or, or one of those diseases in, in WA you could very quickly lose that, that reputation you have internationally … (S_P_G_5)*

A few interviewees questioned if 'clean and green' would be sufficient as a competitive advantage as other states, such as Tasmania, and other countries, such as Denmark, are building on this image as well:

> *It's not a competitor advantage unless you've got something that someone else hasn't got, or you've got it better than them. So increasingly their competitors, our competitors, have got those attributes. You can have a great story out of South Africa, or a great story out of Peru or, as one of the Chinese were telling me, the Netherlands they reckon is clean and green and there's probably more Chinese tourists going to the Netherlands than coming to Australia. So even then we have competition. (S_P_G_3)*

While some participants saw the 'clean and green' image as a competitive advantage for the agriculture business, it was not clear how that could be used as a competitive advantage for a niche tourism strategy apart from marketing an excellent food experience. Other 'iconic', unique features of the area were discussed as pull factors for tourism. Although the distinctive landscape, flora and fauna were mentioned numerous times, experimental food around native plants and Indigenous expertise was widely acknowledged as the best possibility to establish a strong pull factor for tourists – especially in the Great Southern.

Are bushfood and experimental food combinations a unique drawcard for the south west?

One idea for a more unique branding for the south west was seen in promoting Indigenous food experiences in terms of 'Bushfood'. Nevertheless, building tourism around bushfood experiences was seen more as an opportunity for the Great Southern than the South West, taking the higher Indigenous population into account. Especially for the shires of Katanning and Kojonup, there seems to be a real opportunity to build on existing places like the Indigenous experience and museum ´Kodja Place´ in Kojonup. Interestingly, some farmers have already started to reach out to the Indigenous population to experiment with combining local herbs with local lamb:

> *... I think with the native, or the bushfoods, that we're doing, it can actually make that country that's virtually worthless into, actually a viable acreage, you can actually get something off [the] country that you can't get anything off at the moment, or perceived as not getting off, because we're looking at it through very traditional eyes, you know, running sheep or growing crops, but we're actually looking at something that's already there and just utilising that. And maybe we should be talking more to the Indigenous people, and I actually have been talking a bit to them, to see whether there's other plants out there that they've used, and there is, but they've just got to show me where they are, and hopefully we can get them involved in some sort of collaboration. (GS_K_F_39)*

Building on bushfood and traditional recipes was also seen as a good way to include the Indigenous population more in the economic activities of the regions:

... we've just yesterday planned today a salt bush demonstration site on the back bowling green, so that's pretty exciting; we're going to put some perennial pastures so that farmers can see how they grow. And then over here we were hoping to get some funds to go to plant bush feeds, so shrubs and bushfoods as in vegetation not animals ... we get quite a few families [from the Indigenous community] come in ... , they're just not particularly well engaged so that would be something we would hope that we could get them interested in and get them involved a bit more in that perhaps, it's up to them if they do, but it would be great to have it, it would be a great drawcard I think. (GS_C_A_42)

I would like to do that more than ... it would be great to have the Noongar people involved. And actually set up a farm, a bushfood farm that they can actually come and run and do all that – it's probably a bit of a pipedream, but I'd like that, I think that'd be really good....and that would be something you can actually say, okay tourists, come and have a look at the bush farm. We've got quandongs, we've got all the different stuff. (GS_K_F_39)

Furthermore, ideas of combining international food experiences and Indigenous food were explored in the local workshop in Kataning, as the regions have not only high numbers of Indigenous people but also numerous immigrant groups residing in the area who are keen to market their native food. As a result, socially under-represented groups would also get a chance to be more integrated in the local community, which would foster a feeling of belonging and wellbeing:

From a tourism perspective, bush tucker is obviously something that traditionally has always existed anyway, so, and has a low environmental impact on – so we're not looking at hordes of people and busloads and so forth, but private individualised tours, but also as part of the cultural awareness, not just for visitors but also for locals and Australians themselves. The idea is to create employment for the local community ... our focus is to create employment in an area where there traditionally isn't employment. So we're looking at a lower socioeconomic group of people who are in town and need, and basically we need to create employment, jobs. So there's an opportunity to tap into their knowledge ... to create those pathways and bush tucker is actually one of them. (Joint interview: GS_KP_C_43/GS_KP_A_53)

The discussion continued around unique products and what could be a drawcard for a substantial tourism influx. In the South West, where the group of Indigenous Australians and foreigners is much smaller than in the Great Southern, lots of smaller farms are already experimenting with unique products, such as pickled walnuts or chestnut chutneys, as well as with new, sustainable ways of farming or discussing ideas for unique events.

What could be other unique products and niche tourism opportunities for the south west?

In both regions, plenty of entrepreneurs were found and many interviewees named new ideas for either produce, tourism experiences or combining the two, for example:

> *Truffle oil's usually really popular, but I think anything that's perhaps a little bit different, something like that pickled walnuts or something like that – something that you might not see – are an unusual sort of product. (GS_A_R_64)*

Ideas were wide-ranging: dry aged Marino mutton, chestnuts, tropical fruits and vegetables, cashews, community gardens and study centres, strawberry farms, macadamia farming, producing whiskey, brewing beer, sandalwood products, town music competitions (similar to the Eurovision Song Contest), yabby farming, new festivals, canola crop tours, using native herbs and plants for new recipes, establishing a cultural centre around a community kitchen in which different cultural groups could offer their native food, homemade chemical-free jams and marmalades, homemade cookies, gourmet chocolates, mountain lifts, food trails and food appreciation events. Some of the quotes below give evidence of the very wide range of ideas that exist in the communities:

> *I want to make … community farming as well as livestock and we will become a centre for those who want to come and study how to grow market garden[s] or big trees. It can be a training centre. (GS_K_F_63)*

> *… I know that there's just south of here there was a, a farm that started off, a trout farm and that was quite successful and that, that helped with the tourism side. They were getting busloads of tourists bypassing [sic] their farm to see how trout were harvested and farmed on a farm. (GS_K_F_64)*

> *… there's the old sale yards kitchen as well. The old sale yards kitchen is an underutilised resource and the other good thing about that facility is you've got the kitchen there, you've got the space there and you've got lots of different offices that you could actually set up as a type of a cultural hub there to actually create food and produce. (GS_K_R_59)*

> *… just to stop and take a photo of those wonderful canola crops, a lot of people are stopping and doing that now, because they're beautiful. (Joint interview: GS_KP_C_43/GS_KP_A_53)*

> *… I'm quite optimistic that we would have something here and we could get the people to come, but I suppose its building that up and getting the people to come. I've thought about having a festival … I mean you could have a festival of the stars. Like we have here what people don't see in the city, or especially internationally in the big cities, they don't see the full sky at night time. (GS_KP_F_54)*

> *… last year we did some food appreciation regarding apricot, we served people, for $50, quite cheap, five courses of apricots five different ways. And one of the ladies we took through, her and her husband were a beautiful couple from New York … they've never seen an apricot on a tree. So they sat there for about 10 minutes and I just said 'Gorge yourself, eat as many as you like,' and they were so happy, and to see the joy of this couple in their 50s eating apricots straight off the tree, it was so cool, and that's what the experience has to be about. (SW_BG_F_24)*

The discussion on new products, unique events and major pull factors was in evidence in all shires, mainly because of the experience of small tourism numbers. It was widely acknowledged that to build on a niche tourism strategy the numbers of incoming tourists would need to grow significantly.

How to scale and enter new markets for the south west?

One of the major concerns of interviewees on the question of tourism was always scale or how to attract enough tourists to the region, particularly the remote areas. Numerous times interviewees discussed finding that niche product that will act as a drawcard. Building on a bushfood tourism experience was seen by several participants, as noted above, as a very viable tourism option, especially for international tourists. It was also mentioned that bushfood is already acknowledged internationally as a niche tourism product of Australia but that the south wwest has not really tapped into the market. As funding is already allocated for this kind of niche tourism it should be reasonable easy to build on existing conditions and strengths:

> *Interestingly enough from a tourism perspective, Indigenous tourism is one of the highest priorities based on an Australia-wide focus, as well as on a Western Australia focus. So there's actually funding to assist us with that process. The surveys that was [sic] done, especially in Europe of why people wanted to come to Australia, was to experience Indigenous tourism. (Joint interview: GS_KP_C_43/GS_KP_A_53)*

> *I mean I've been to a few tourism events where they've actually had a combination of farm produce and the traditional food with a sauce or a berry-type stuff, and you know, to me, then the combination was great. It's unique, and so it's something that really can be developed on without doubt. (GS_KP_I_44)*

Other new origin markets were discussed widely, as it was universally accepted that the key to success would be a constant number of tourists coming to the area. In both case study areas an extensively discussed topic was how to enter new markets, either in terms of supply of produce or demand of tourists. It was acknowledged that national tourism numbers are limited and that overseas markets should tapped. A few interviewees realised that international tourists are interested in very different experiences than their Australian counterparts, similar to the interest in Indigenous and bushfood experiences that were found to be more interesting for international tourists than national ones:

> *… to people from outside Australia, in particular, what we accept as a given and commonplace, they see as unique, and I think that is always at risk of being overlooked that the whole of our agricultural and the way our systems work are foreign to 99 per cent of the world's people, or whatever it is, and I think there's something, there is elements of that which are of high interest to people from elsewhere and we should always remember that in the way that we approach promoting and marketing the region. (GS_A_G_40)*

> *… it was about 42 degrees in summertime and I remember thinking, oh, this is hot and awful, and there was three coach loads of European tourists standing around taking photos of the big rock [Wave Rock], and I just thought, what – you drove four hours to get here? and then I thought, 'well, in the end, probably the European tourists have never seen anything like this', just like when I went to*

> *Europe, I went and looked at old buildings and fountains because it's not something we have here. So, and I thought, 'oh, well, that's probably what we're overlooking, is the fact that our point of difference is that we are so different to people's experience, they are prepared to drive four of five hours in a coach to come and have a look at a big rock and stand in the middle of the outback in 42 degree heat, because they've never experienced that'. (GS_K_C_38)*

Regional participants acknowledged that they do not have a good understanding of foreign markets, although some ideas about differences between European and Asian travellers were contemplated. It was, for example, acknowledged that Germans will travel long distances in the heat to experience the unique Australian landscape. It was generally agreed that Asia could be an upcoming market for the south west, but it was recognised that knowledge about preferences of this tourism segment is limited in the region and necessary infrastructure in terms of accommodation and food options is missing. The following quote illustrates the differences in understanding of tourist markets:

> *Germans are, in my experience, great travellers and just will do whatever is required to have their holiday, that's fine. Australians are the same. I don't really know what Asian expectations are when different Asian visitors come to this country. I think it's a growing market. But yeah, I mean, how well do Australian tourist operators really understand the Asian markets? I don't know. Some probably understand them well and others not. (GS_A_G_45)*

Apart from new products and understanding different international markets, some other ideas of how to bring more tourists to the shires ranged from school children to cruise ship retirees to university students.

In a more and more urbanised world, more children are losing touch with the countryside. While currently school children visit farms from time to time, participants discussed how to expand this market and possibly even take it overseas to attract Asian school children:

> *Because we have ... probably every second or third week we have school groups from the camp school come through here as well. So we have 30–40 kids running around for the day and they feed all the animals and then we go and cook damper with them and they're horse riding and that sort of stuff. (SW_BG_F_17)*

Another opportunity was seen in the cruise ship business. Cruise ships are seen in Fremantle, close to Perth, during the summer months, but it was realised that currently no cooperation with the cruise ships exist to offer farm tours or similar to the regional areas of this study. The cruise ship business could be a huge opportunity for the regions, as cruise ship tourists are usually affluent travellers who value gourmet food and wine experiences. Combining a regional tour of the farms with a gala dinner of local produce and sale of local produce and wine could open up a new market and offer fantastic marketing opportunities. If enough interest can be sparked by, for example, marketing regional self-driving tours, chances are good that cruise ship travellers would come back for a longer visit of the south west:

> *...we do get cruise ships in from November, but we don't get a lot of additional business from that, we might get a lot more people coming in and looking around, so, you do, sort of – there's a mix in those as well. (GS_A_R_64)*

Apart from school children and cruise ship travellers, additional opportunity was seen in university students of the broader field of agriculture to offer them hands-on experience and a deeper understanding of their theoretical studies:

> *Even besides the touring, we have [the] opportunity to bring university students who are dealing in the agricultural field to come and stay on the farms and learn and come in groups and study in the region; they're opportunities that could be expanded. (GS_KP_F_54)*

Farm stays were not only discussed for educational reasons but also in a more general context. Farm stays already exist in the area but only to a small extent in the South West and on an even smaller scale in the Great Southern:

> *… I think there's a number of tourism opportunities, some of the small sustainable farming models, so some of our small dairies that are starting to pop up where they're making organic produce, farmgate produce, that's always of interest to people where people can actually get involved … and I still think in general, city people, which I am originally a city person, have absolutely no idea about food production and there is a huge potential market to bring people into our region to teach them about where their food comes from … (GS_C_C_37)*

Interestingly, where farm stays have been established in the South West, the accommodation business often has become the main income for farmers and the core business of ´farming´ has become a secondary income or only a necessity to attract tourists to the farm:

> *No well, that's what they're coming to see – the farm. So for us we need to have the farm and it needs to be, well you would still have some type of tourism if it wasn't a proper farm. There are some chalets around that are on a small acreage. They're not farming but they attract different type[s] of people, but a lot of our guests like to come to here because it is a working farm and we still do farming – probably not to the same degree as what proper farmers do, but we still do a lot of farming … (SW_BG_F_17)*

It has to be acknowledged therefore that the farm-stay business could be a great opportunity to keep farms profitable and operational. Already today, farms in the South West often are only kept operational for tourists, or new accommodation businesses are established on a lifestyle property where guests can experience fresh produce and cooking classes. In comparison, farms in the Great Southern are huge estates and are often solely sheep or cattle farms. Understanding these differences is paramount for a tailored niche tourism strategy, as the lifestyle farms in the South West versus the big-business farms in the Great Southern will be able to attract different types of tourists. For instance, interviewees raised the idea on several occasions that the big farms could be, while not necessarily interesting for the traditional tourist, of high interest for students or farmers from other countries who want to learn more about farming:

> *… there's a big area that could be explored as far as working farms. I know that's not a new idea, but even if it's a trip to a farm where there's shearing being [done], I know they do that in different areas, but maybe we need to think of something unique … we can see a lot more tourism and a lot more money coming into the town. (GS_K_F_64)*

Combining agriculture and farming with tourism was seen by nearly all participants as a good idea to diversify the economy and guarantee a more stable income for communities. Apart from biosecurity, regulation and insurance concerns, a main impediment was seen to be farmers' lack of time for a side-business. Further impediments to developing a niche tourism approach based on agri-food are manifest in distance, accessibility of destinations and lack of tourism infrastructure available in the regions. Farming is a very time-intensive business, and farmers especially nearly always mentioned that one issue with tourism is that it takes time to set it up, time to run it, time to search for grants and information, and time to advertise it. While other participants often saw the farmers in charge to develop the link between agriculture and tourism, farmers made it clear that while they are always looking for new income alternatives – and tourism could be one avenue – the overall set-up and marketing effort would need to come from a broader base if agri-tourism is to be used for regional economic development:

> *I guess if everybody is proactive about it, I guess that will help; but I think it's the timeframe is a big thing on, with farms at the moment, there's so many other things that you need to do on the farm, including the bookwork side of it, that it's, it's the time factor. But if everybody got on board and were very aware and proactive, I think it could work but it means everybody getting on board. (GS_K_F_64)*

> *...it's great for us to come up with these ideas, and concepts and so forth, but if you're the farmer, I've got a business to run; do you want people trampling across with busloads to get it to a tour development stage? And you're probably looking at quite a bit of work some years away. So unless the farmer themselves, the ideal scenario, the farmers can hand it over to the children and you've got someone who's got the spare time, and that's the thing, it's that resource of time, it's someone who knows the farm and is willing to know and explain it as a tour. (Joint interview: GS_KP_C_43/ GS_KP_A_53)*

Apart from the time to develop and run a tourism business on a farm, another constraint was seen in regulation; for example, by needing dedicated toilets, including one for people with a disability.

Is regulation a major hindrance to agri-food niche tourism?

Regulation was seen frequently as a barrier to starting a new business idea or to add value to an existing one. While people widely acknowledged the benefit of regulation, they often asked for a bit more flexibility for the countryside, where circumstances often are quite different to those in the metropolitan areas:

> *Being crucified by regulation would be my response. Boy it just makes it so tough when people have so much red tape wrapped around them that they don't know whether it's even worth having a go. (Joint interview: GS_KP_C_43/GS_KP_A_53)*

> *I mean most of the rules and regulations and policies, like especially around food safety, or different things like that, or you know, like they're all in place for a reason, which in the end is beneficial to people, even if they can't immediately see it until something goes wrong. (GS_KP_F_54)*

Several times interviewees mentioned that policies are developed in Perth by people who may not have visited rural areas and know them first-hand. Participants offered anecdotes in which they were inviting government officials to the countryside to prove that the policy could not be applied in particular spots. A broad agreement existed that policies should be written in closer collaboration with actors on the ground:

There's rarely any assessment of policy and regulation on the value of the policy and regulation. So there's no point if applying a policy where the net gain to the community and the economy is less than the cost of imposing it and I think frequently that is the case and it's not just an economic decision, it's a bigger picture about community benefits and all the rest of it and often I feel, as a farmer, that these things are put in place without any reference to what the value of having the thing there is. (GS_A_G_45)

... a little bit of the old KISS principle [Keep It Simple, Stupid] – keeping it simple, and making it work, and I think the important thing is that whatever is being done, needs to be done in collaboration with the people who are in the business. It's fine to sit in Perth – or wherever it is – and pontificate about what works for farmers, but you need to talk to the farmers. (SW_BG_C_22)

Further to general regulation issues, interviewees gave concrete examples of where they saw regulation being a barrier to developing more agri-tourism experiences. The following quotes will give the reader deep insights into the thought process of the local population:

I know one of our suppliers had an issue because they had the wrong labelling – they had a PO Box, not an address ... So, we couldn't get anything from them for a while until they had to sort it out... (GS_A_R_64)

They're the natural experiences. And then you've got the insurances and the reliabilities and all the risk management. So you can't do something like a hay bale ride, I would imagine, it's a country-unique experience. So there needs to be, and I don't know the answer, a way to be flexible with it and still protect everyone that needs to be, but if I was a visitor going to another country and I want a hay bale ride and I sign my life away and if something happened I don't care, but I want that hay bale ride, then I should be allowed to. (Joint interview: GS_KP_C_43/ GS_KP_A_53)

I'll use kangaroo meat as an example. We've hunted for thousands of years. That knowledge has been passed on through our elders to my generation and I'm passing it on to the generations below me that we can tell when a roo's not healthy and when it is healthy. You know, there are signs, you get signs on the liver, on the kidneys, on all its organs, you can see the signs that it's not healthy, even before you shoot it you can tell whether it's healthy or not. Yet for us to sell that, or for a tourist to consume it, we have to follow and go through all these other policies and procedures that are in place, and we can understand why they're in place, but the impact on us holding a tourism event here of bushfoods, because again if you go and pick a berry somewhere in the bush, realistically you can't bring it back here to sell. It's got to be farmed. It's got to follow that process, and you know. (GS_KP_I_44)

> *There is a challenge between cottage industry, and making things professional, and that I think, appropriately, should be a grace base to allow people to learn and to grow. If we were heavily regulated with what we were doing here, the vision that we had two years ago is exceptionally different to what we're now going to, and actually because we've had the capacity to learn and to grow and to experiment, so if there is rigidity in the statutory process that actually kills innovation. (SW_BG_F_24)*

> *I think there's a lot of paddock-to-plate opportunities. I'd like to see more product actually being prepared on site. So probably the biggest one is the health regulations and actually getting around the permission and the processing constraints of the health food ministries. You can't make jam in your home or you can't cook a cake in your home. You actually have to have a licensed kitchen to do that and I can see the benefits of having a community license[d] kitchen that people can rent space from or actually to have a bit more of a network that we can actually work together with people. So for example this kitchen is empty four days a weeks. If it could get used for something else then that's a great opportunity. (GS_K_R_59)*

In addition to regulations, people saw the lack of coordination and collaboration as a current impediment, but also as an opportunity to work together to reach a common goal, as the above statement illustrated.

Working together in the south west?

The lack of collaboration and coordination on all kinds of different levels was a repeated theme. A major issue was the exclusiveness of the Food Council that was established by the Shire of Manjimup. Unfortunately, only farmers from the shire are allowed to join, while nearly all farmers interviewed in neighbouring shires would like to join, promote the region together and link it with tourism. Geographic borders are political borders where people and their product are excluded to join certain joint marketing efforts or are not allowed to participate in local farmers' markets and festivals because of their postal address. Political boundaries are especially evident in the case of the Manjimup Food Council, as some farms would be a good addition to the offer of the Food Council but, while located only meters away from the political border, are not allowed to join. This issue was passionately discussed not only during interviews but also during the local workshop in Manjimup. Other alliances also exist in the area. Hidden Treasures in the Great Southern is a tourism body supported by several councils, and the Alliance Council in the South West is a tourism body established as an alliance between three councils. Participants widely supported initiatives to ignore the artificial political borders and asked for joint regional efforts based on common interests. Moreover, interviewees complained frequently about the fragmentation in WA, as plenty of different associations exist covering different products and geographic areas. The following quotes give rich evidence of the frustration with political borders and fragmentation in the area:

> *I think it also looks like coordinated systems where we say, from a tourism perspective, you've got this coordinated map of the region and cross-regional boundaries. The region is artificially, as I said, artificially constrained. The government made it up. It doesn't exist. So if we're pushing people to Franklin*

River and Denmark we might as well push them into Pemberton, Manjimup, Walpole, Denmark because those boundaries are artificial anyway. It's really about promoting things that work for tourists, so let's promote areas that will work together – food systems. Good quality food being available, local food, and local wine being available at an affordable price. (GS_C_C_37)

Yeah, but if you try and draw it on the map you just, it's not going to work because even if you go and look where Esperance is and you draw a line, if you had Australia as a whole that is still the south west ... yet people in WA think the South West is just Margaret River, the Great Southern is Albany and Denmark and then you've got the southern interior. So it gets a bit confusing and when you try and explain to people where the South West border comes through they get a little bit surprised. (SW_BB_F_19)

Oh look, without getting into the detail of how the event's run and managed, it has gradually started to expand its footprint, but it's true to say that Taste Great Southern has more or less been restricted to the coastal shires but now, because of comments like that, they're starting to broaden activities further afield. (GS_A_G_45)

Our view at the moment is – and our strategy at the moment is – to attract people to the area for the area, but also to have an attraction for those people who visit other parts of the South West. We know already that the coast has a very strong magnetic attraction, so, Busselton, Augusta, all of that coast area. What we're trying to do, is to say, well, if you're doing that, then what about coming to see the Hinterland because it's got these sort of attractions. (SW_BG_C_22)

There's plenty of associations. There's an association for every little product and fragmented all over the place. (GS_A_G_45)

Yeah, I think one of the issues across country Western Australia is nothing's connected, nothing's joined up, everybody's doing their own thing, individually and separately, so, I think a little bit more cooperation and a little bit more support to build a product that people can move from town to town and fill their days with rather than – you come into a town, and you think, well, what is there to do here, and you might not know about it. So, I think there's room for more connectivity ... (GS_K_C_38)

One of the challenges with tourism is, and agribusiness/tourism, is there are lots of small community groups in this region all trying to do the same thing ... (SW_BG_F_24)

Apart from fragmentation on a regional level, the disconnect between federal and state government and different state government departments was seen as a problem. Participants would like to see more collaboration and coordination between federal and state government and different government departments, as evidenced in the quotes below:

There's a whole range of incentives or support for innovation, which I'd like to see greater – they still exist in some forms, but I'd like to see greater continuity and enhanced cooperation between the federal and state governments in trying to make that happen. (GS_A_G_40)

> *There was a restaurant down here who's in a heritage building who wanted to do some development and he was told he couldn't do the development unless he provided wheelchair access, but he wasn't allowed to provide wheelchair access because it was a heritage building, and this was different departments managing different tasks. (GS_A_G_45)*

In addition to the fragmentation in regulations and associations, participants also experienced the same fragmentation in terms of support groups that try with similar efforts to help in the region but with the result that 'every other week another group runs a similar workshop':

> *I think there are actually a lot of services available, but they are a bit all over the place. There's a lot of players, including universities, chambers of commerce and industry and Austrade and all sorts of people who are doing online this and that and – but it is not possibly at all choreographed. (S_P_G_3)*

While emerging regional approaches exist, such as Hidden Treasures and the Alliance Council, and there is some support from state government, universities, Regional Australia and other organisations, the fragmentation experienced on a geographic level seems to be the biggest impediment to a comprehensive regional niche tourism strategy, as too often neighbouring shires are seen as competition and opportunities are missed to market the region together to a wider audience:

> *In terms of tourism, I don't think that there's anything that inhibits it. The biggest problem is that at the moment we tend to operate very much in isolation, so, we're promoting Bridgetown, or we're promoting Northcliffe, or whatever, rather than we're promoting the region. (SW_BG_C_22)*

> *I think the biggest one is immaturity of people thinking that their major competitors are their neighbours and even Margaret River isn't our competitor; Margaret River is a great asset to us – they already have a world-class reputation so we should be partnering with them to say how can we enhance their visitors' experience rather than saying oh if only they came here rather than Margaret River. They're always going to Margaret River, but we're very different; we've got different topography, we've got different soil types, different vegetation so we can just broaden that experience, so to me it's all about collaboration and partnerships. (SW_BG_F_49)*

One challenge all shires of the case studies had in common was the distance to Perth and the question about how to attract a significant number of tourists to the hinterland of the more popular coastal tourism areas.

How far is Perth?

A lot of interviewees realised that the distance to Perth, and even more so to the Australian tourism hot spots such as Sydney and Cairns with its Great Barrier Reef, is a major challenge to attract sufficient numbers of tourists to the countryside of WA's south west:

> *The main challenges, probably a big challenge I guess is population and distance; 300 kms from Perth is quite a fair step for someone to do on the weekend for tourism. If they go to Margaret River they can stop every twenty minutes and see something else on the way, but really from Perth to here there's not a lot to stop and see. (GS_C_A_42)*

The long drive from Perth, and also the costs in general for flying to Australia (for international travellers) or from the eastern states to Perth (for Australian travellers), were seen as a major risk for developing a sustainable tourism industry. It was noted that 'there is not much in between to see' and it was agreed that the tourism product needs to be a unique and niche product to provide an incentive for tourists to visit WA's south west:

> *Manjimup I think has got lots of opportunity. Its diversity gives it a lot of opportunity. It's a beautiful, more pleasant environment for more of the year than the more eastern areas. It's a little closer to Perth, not much, and still a long way away from Perth – 3½ hours drive is a lot for a lot of tourists. But I actually think there are opportunities if the local people really focus in on what tourists want. (S_P_G_3)*

> *Look, one of the main challenges for them is, is isolation and lack of critical mass if you look at the distances involved. So you've got a number of different forms of tourism – you've got your local tourism, your Perth market for these areas, your day trippers or your weekend trips. And then you say, okay beyond that I guess you're looking at interstate travellers and then international travellers. There's a real challenge for an international traveller to get to Katanning: Number 1) costs a hell of a lot to fly to Australia; Number 2) if you fly to Australia you're probably going to fly into Sydney or, or Cairns, getting to Western Australia is very expensive on its own, and then getting from there to a location like a Katanning or even a Margaret River is an additional cost imposed. So you've got to be realistic about the likelihood that you're not going to get those visitors unless you have some very good offering that people are going to say, 'Look, I specifically want to go there for this.' And that's a real challenge because you've got to have something that consumers see as sufficient value to be willing to pay that extra money to get to those locations. So that's a challenge. I think you've got to be realistic then about where your target audience is for tourism. (S_P_G_5)*

Nevertheless, interestingly enough, a few interviewees from the South West actually mentioned the 'closeness to Perth' as an advantage, for example:

> *...relative closeness to Perth I think makes it good for both getting your goods away; your animals for us and also for the tourists to get here to have a look at the business. I mean a lot of the customers come for a weekend or come for a few days. It's not something where they want to travel a long, long way to get to go to I think. (SW_BG_F_17)*

Despite these views, distance to Perth, but also to Albany, were mainly seen as an impediment to attract sufficient numbers of tourists to the shires. Nevertheless, in the context of the huge, sparsely populated land masses in WA, some interviewees perceived an advantage to be only 3–4 hours drive south of Perth. Fewer interviewees mentioned that not only does the distance influence the scale of tourism but that it is also an impediment to networking and to enable a critical mass for business workshops and start-up facilitators. Furthermore, low tourism numbers mean that maintaining sufficient opening hours is challenging.

Can the south west be an all-year-round tourist destination?

As a result of low tourism numbers, shops, museums, attractions, cafes and restaurants are very often only open on the weekend during winter months and often have very limited opening hours. During the time the researchers were in the field, they experienced numerous times where shops, cafes and restaurants were closed half of the week or it was impossible to find an open coffee shop after 4 pm. Consequently, the target group has to be considered and specified, taking into account that the Australian winter is the main tourism season for European and North American travellers, and therefore opening for a few hours on the weekend would be insufficient for an international market but probably sufficient for tourists from Perth:

> *It costs money to keep these places open, we don't have the volume – see if we had the volume of people coming through – if that same business – and we use the café that's in town here, we've got, called the XXX café, [deleted for confidentiality reasons] ... served Indigenous food for example, paddock-to-plate type – we'd do well, but if that same business could uproot and be in a busy say, Metro area, they would be expanding. It would be like – you wouldn't be able to keep up with the demand. But very good product in this region, restaurants, sort of that [sic] experiences suffer because we don't currently have the volume. (Joint interview: GS_KP_C_43/GS_KP_A_53)*

> *It's that critical mass, it's that scale to get enough places going all at once and then we go 'look what we've got here' and then people will come down and experience it. (SW_B_G_46)*

Interviewees in both case study areas acknowledged that festivals, long-table lunches and all other kinds of special events bring an influx of huge tourism numbers. However, it was also recognised that it is difficult to scale up the businesses only for a couple of days, that towns also have to be ready to deliver quality tourism products and that in some instances less people are coming to established events than a few years ago:

> *In the last few years it got a lot smaller. The numbers aren't coming. They used to rely a lot on what we call grey nomads who come in and they would come for 4, 5 days and camp. When that happened it just was such a big influx of money coming into the community. (SW_BB_F_19)*

> *Yeah that's the thing. We need to be ready. We need to have the local tourism running to build the experiences, to build packages for the people to come and visit. We can get more people here now that are going to spend more money but that's not – that's still not going to help us develop, develop what we need to be developing. (Joint interview: SW_M_A_15/SW_M_A_16)*

Related to the challenge of attracting a constant number of tourists was providing the right infrastructure for tourists.

Is the south west ready for the influx of tourists?

Major shortcomings were seen in terms of transportation, telecommunication and soft infrastructure, such as accommodation, a variety of eateries and, as discussed above, opening hours of existing establishments. While the condition of the main highway was seen as good, the mostly unsealed roads inland were seen as a problem for tourists. Rental cars are not allowed to drive on gravel roads and this aspect makes it impossible for international travellers to experience some of the attractions of the outback:

> *Same with tourists, so they don't want to drive on gravel, hired cars are not allowed to go on gravel, so it really limits the access that they have into some of the amazing places we have because they're accessed by gravel roads. (GS_C_C_37)*

A general lack of public transport was seen as a major constraint, especially as some international travellers are unwilling to drive long distances in remote areas and are not used to the Australian wildlife:

> *Local infrastructure … if we had a better public transport system. At the moment, the only way to get here really is by car or maybe guided in a coach, but, on the whole, we don't have a public transport system that allows you to, say, leave the city or a major regional centre and get to these towns easily. You can get here, but sometimes you can't leave again for several days, so. (GS_K_C_38)*

Some interviewees also questioned the possibility of transforming regional airports into international ones to make the regional areas more accessible for international tourists:

> *I think something like the Busselton airport would probably be better like if they were to take on say the international flights or to be more competitive with their pricing might be better... (SW_BG_F_17)*

A major issue that was mentioned several times in both case areas was the lack of quality accommodation and in some cases a lack of accommodation at all:

> *… the other thing is that we don't have farm stay or a lot of that accommodation available, and XXX [deleted for confidentiality reasons] has accommodation and it's nearly always booked up, but it's mostly business oriented. That accommodation's booked up with people here for business. So, we don't have an eco caravan park, for example, where people can go and have a bush experience or a farm experience with a caravan or camping. We don't have that sort of product, and I think we could do more there. (GS_K_C_38)*

> *… a busload of people from China can't currently come down here and book one place for them all to stay. They've all got to stay at all the little local places, which is good, and we want that, but we do also need the option for them to stay in the luxury, 4/5-star hotel. (Joint interview: SW_M_A_15/SW_M_A_16)*

> *I think we need more shops and motels, that sort of thing, that people can depend on, because it is pretty far to go there to spend a whole day or something or overnight. We need to think about those things … (GS_K_F_63)*

> *Oh, accommodation that's a big problem … I think that we need to have proper and decent accommodation here … our hotels and our accommodation are pretty shitty, and if we had nice accommodation you would probably, actually be staying here. GS_KP_F_54*

Apart from accommodation, participants mentioned that a lack of quality shops, cafes and restaurants – especially to cater for different food preferences such as vegetarians – exists:

> *So, and that's the other thing is once it's 4 o'clock here nearly everything shuts. The IGA [supermarket] stays open until 6.00, but the Deli here stays open I think until now 7.00 or 8.00 but it depends on who's in town and what's happening. It's hard to get people to understand because there's not even a place to go and have an evening meal in XXX [deleted for confidentiality reasons] unless you go to the pub. There's nothing in town ... (SW_BB_F_19)*

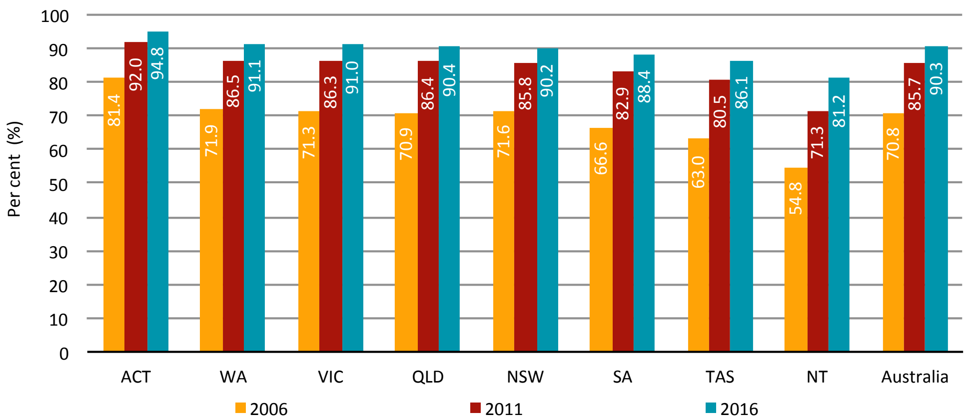
In an era of online marketing and day-to-day communication by mobile phones and internet, a major constraint was seen in the poor telecommunication coverage in regional areas of WA's South West:

> *And communication, so especially – it's not too bad now along the major highway but getting out to farms ... you can go from one spot to another on a farm and you've got no wireless signal at all, to full signal. (Joint interview: GS_KP_C_43/ GS_KP_A_53)*

> *The other thing is starting to utilise making more use of online connection with people, but again some of these areas you have limited internet access. So we always think, oh well these days people can get all that information online, but that isn't the case when you're in regional areas; quite often your internet connectivity can be a real limiting factor. (S_P_G_5)*

A look into the report 'Falling through the net' (Bond-Smith *et al.*, 2018) reveals that WA is one of the most connected states in Australia, with a higher internet connectivity at home than the Australian average (Figure 22). However, WA is also the most urbanised state with around 85 per cent of the population living in the metropolitan area of Perth.

Figure 22 **Households with internet access, by state, 2006 to 2016**

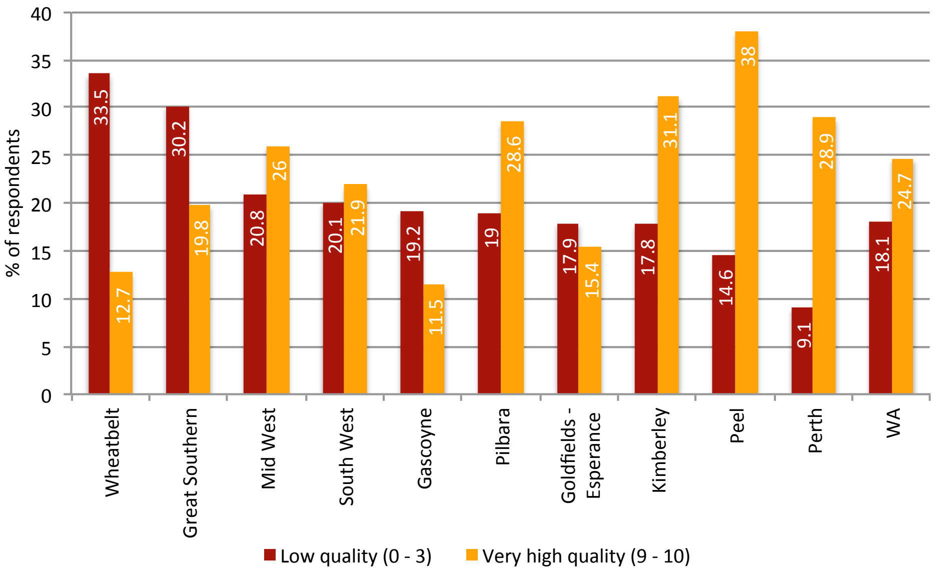


Note: States are ranked by internet access in 2016.
Source: Bond-Smith *et al.* (2018).

A closer look at regional data shows that 30.2 per cent of small businesses in the Great Southern and 20.1 per cent in the South West rate the quality of mobile service infrastucture as very low quality (Figure 23). These numbers are significantly higher than the 18.1 per cent average for WA and 9.1 per cent for Perth. The same applies for the perceived quality of internet infastucture (Figure 24). In the South West, 26.4

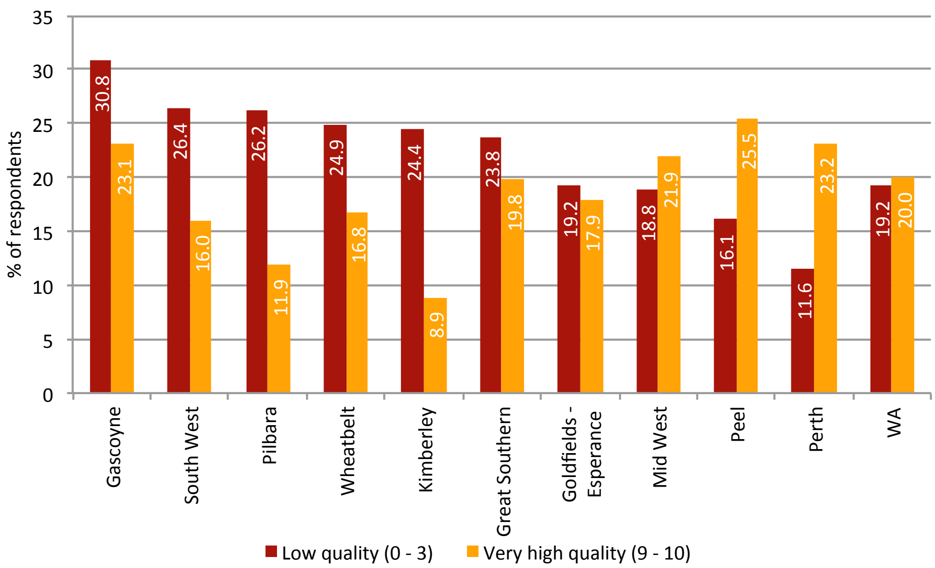
per cent rated the internet infrastructure as very low and 23.8 per cent in the Great Southern, in comparison to the average of 19.2 per cent for WA and 11.6 per cent for Perth. While the combined numbers (Figure 25) are actually lower than the average for WA, they are still higher than for Perth.

Figure 23 **Percentage of small businesses that rate the quality of mobile service infrastructure as low and very high, 2017**



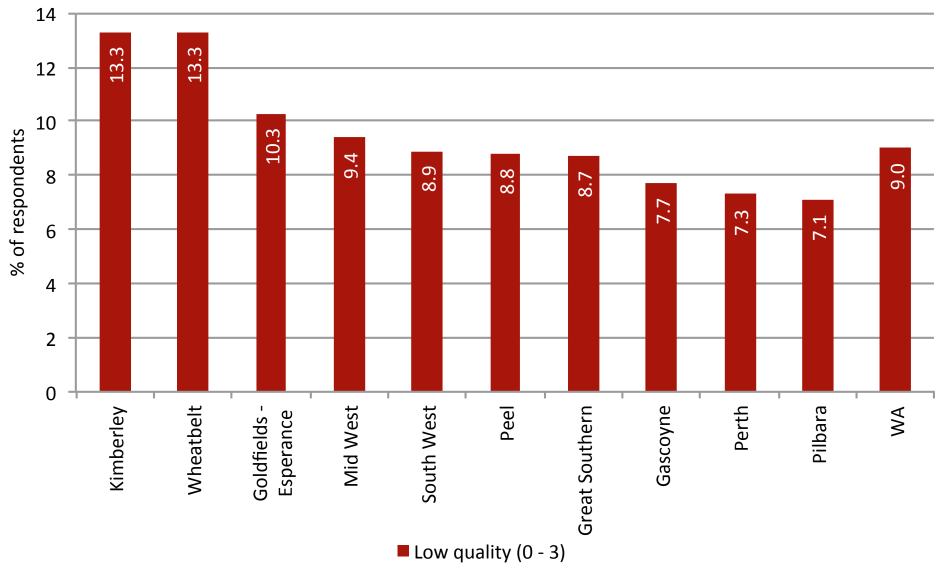
Note: Ranked by low quality.
Source: Bond-Smith *et al.* (2018).

Figure 24 **Percentage of small businesses that rate the quality of internet infrastructure as low and very high, by region, 2017**



Note: Ranked by low quality. Internet infrastructure includes broadband access.
Source: Bond-Smith *et al.* (2018).

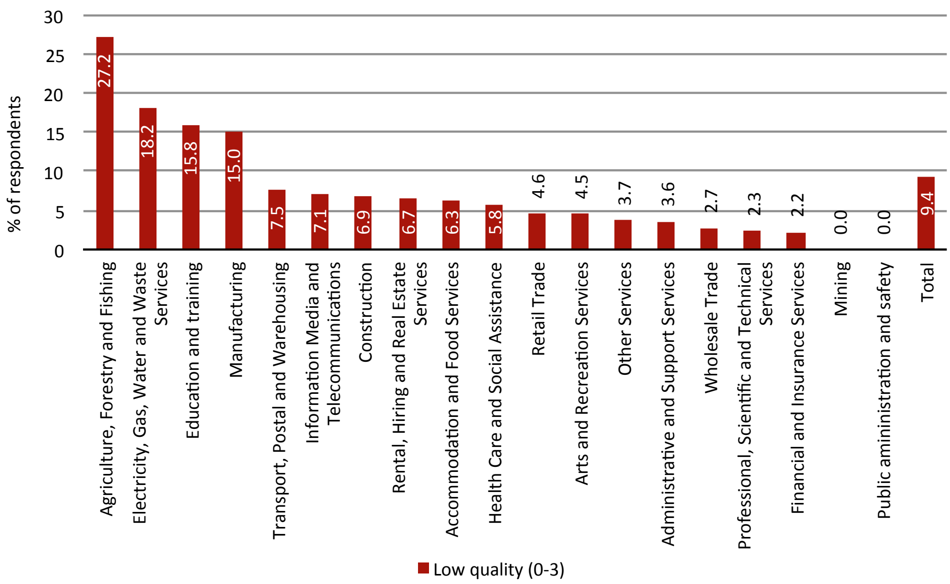
Figure 25 **Percentage of small businesses that rate the quality of both internet and the quality of mobile service infrastructure as low, by region, 2017**



Note: Ranked by low quality. Internet infrastructure includes broadband access.
Source: Bond-Smith *et al.* (2018).

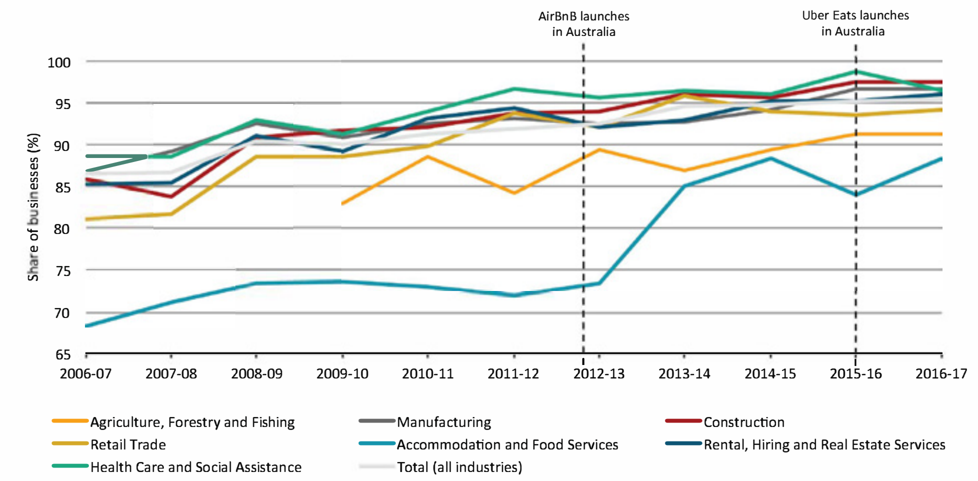
Looking at Figure 26, Figure 27 and Table 8, it becomes even more apparent why interviewees mentioned telecomunication as an impediment. The break-down of percentage of small businesses that rate the quality of both internet and mobile infrastructure as very low by industry shows a massive gap between agriculture and other industries. It gets even more interesting when Figure 27 and Table 8 reveal that the two industries with the lowest numbers of businesses with internet access are agriculture and tourism (accommodation and food services).

Figure 26 **Percentage of small businesses that rate the quality of both internet and the quality of mobile service infrastructure as low, by industry, 2017**



Note: Ranked by low quality.
Source: Bond-Smith *et al.* (2018).

Figure 27 Businesses with internet access, by industry (selection), Australia, 2006-07 to 2016-17



Note: Agriculture, Forestry and Fishing data is only available from 2009-10.
Source: Bond-Smith *et al.* (2018).

Table 8 Businesses with internet access, by industry, 2006-07 to 2016-17

Industry	2006-07		2012-13		2013-14		2014-15		2015-16		2016-17	
	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
Agriculture, Forestry and Fishing	na	na	89.5	15	87.0	16	89.4	16	91.4	16	91.3	16
Mining	91.0	6	97.8	5	98.5	4	99.3	1	96.5	9	97.1	6
Manufacturing	86.8	8	92.5	11	92.8	15	94.3	12	96.7	7	96.7	8
Electricity, Gas, Water and Waste Services	84.9	12	90.4	14	95.2	10	95.3	9	96.7	7	97.6	4
Construction	85.9	9	94.0	9	96.0	8	95.6	8	97.5	5	97.6	4
Wholesale Trade	94.0	4	98.7	3	97.0	5	98.2	5	97.0	6	95.3	11
Retail Trade	81.1	13	92.1	12	95.9	9	94.1	13	93.5	13	94.2	12
Accommodation and Food Services	68.3	16	73.5	17	85.0	17	88.4	17	84.0	17	88.4	17
Transport, Postal and Warehousing	80.5	14	94.4	8	95.1	11	92.7	14	92.5	14	92.0	15
Information Media and Telecommunications	97.8	2	99.4	1	98.7	3	98.7	2	100.0	1	99.1	1
Financial and Insurance Services	95.3	3	99.3	2	100.0	1	98.6	3	99.3	2	99.0	2
Rental, Hiring and Real Estate Services	85.2	11	92.1	12	92.9	14	95.3	9	95.2	12	96.0	10
Professional, Scientific and Technical Services	98.4	1	98.5	4	98.9	2	98.4	4	99.2	3	98.5	3
Administrative and Support Services	91.6	5	93.6	10	96.4	6	96.9	6	96.0	10	96.9	7
Health Care and Social Assistance	88.5	7	95.6	7	96.4	6	96.1	7	98.7	4	96.4	9
Arts and Recreation Services	85.5	10	96.7	6	93.6	13	94.4	11	95.3	11	92.9	14
Other Services	76.7	15	87.1	16	94.7	12	92.1	15	92.3	15	94.0	13
Total	**86.5**		**92.6**		**94.7**		**94.8**		**95.3**		**95.4**	

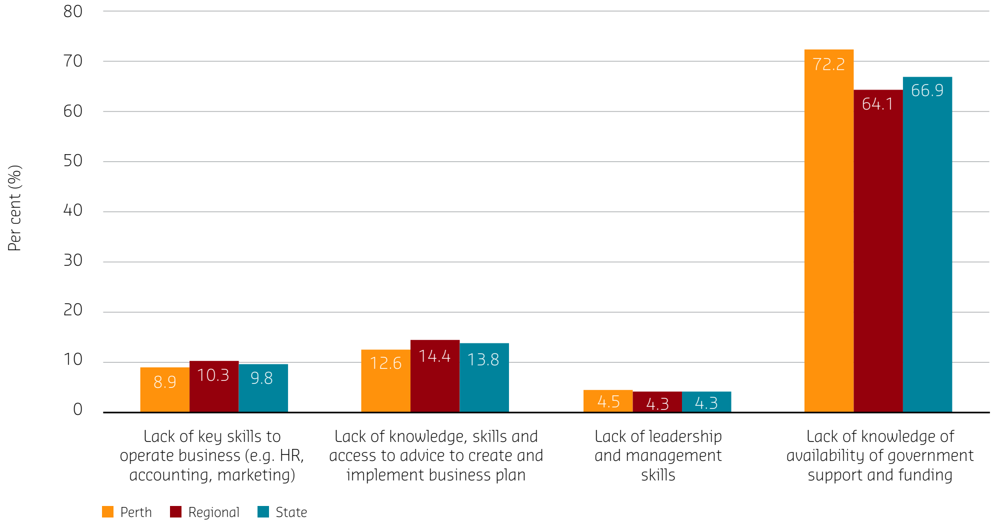
Note: Agriculture, Forestry and Fishing data is only available from 2009-10.
Source: Bond-Smith *et al.*, (2018).

The patchy internet and mobile phone connectivity were also seen as major constraints in terms of getting information and guidance on how to grow entrepreneurial ideas.

Is there a lack of guidance and support for entrepreneurial initiatives?

One major topic that was repeatedly reported was that there is not enough support and guidance for new ideas. The BCEC report on small businesses from 2017 (Bond-Smith *et al*., 2017) discussed this topic intensively. Figure 28 shows that, indeed, in these regions the lack of basic business skills is higher than in Perth.

Figure 28 **Percentage of small business owners lacking personal business skills, Perth versus regional WA, 2017**



Source: Bond-Smith *et al.*, (2017).

Interviewees frequently mentioned the desire to have a manual or guidebook and a dedicated person at the government level to guide them through all the questions that arise at the beginning of a new business venture, as a critical mass for workshops and networking opportunities is lacking in the more remote areas. Other hot topics were access to knowledge, an establishment of a one-stop shop and lack of community support for new products. The following quotes and sections give a very deep insight into ideas for government support to foster entrepreneurism and niche tourism in the South West:

> *… I think maybe some sort of guide or a template, or a blueprint, whatever you want to call it to work from a small base and make a difference and succeed from a small base, because typically the niche side of things, that's what you're doing, and maybe based on case studies, would be of assistance. (GS_A_G_40)*

> *I suppose, if you had coordinator in the area – the shire employed somebody with something like the Landcare office does, sort of thing. If the shire had something like that, yeah, they probably could, or combine it with it or something. (GS_K_F_35)*

> *… , so we'd need someone to guide us through, and guidance. And then the people, they're also understanding the process as well. (GS_KP_I_44)*

It just needs to be some type of a guide site. If you want to start a business, this is what you go to, these are the things you must comply with and we can help you. So instead of having to come across these regulations down the track, there needs to be a source of information right there in front of you that's in a more layman's terms and having to wade through the entire health regulations from woe to go but probably more targeting. If you want to produce jams and pickles, that these are your regulations. If you want to produce cakes from home, these are your regulations, and just probably more niche market identifications within that would be helpful. (GS_K_R_59)

I think something like a mentoring system would be great, so in other words if there have been successful businesses start up I see no reason why some of those people couldn't diversify their business and then become mentors. I don't want government mentors, but I do believe there are some really successful examples and they should be encouraged and paid by government to become mentors. (SW_BG_F_49)

Apart from having mentors or a dedicated officer, interviewees frequently discussed access to like-minded people and knowledge:

Well I think it's that access to support and expertise, because I think quite often entrepreneurial people can feed off a critical mass or a collective of likeminded people.And sometimes that can be quite difficult in a regional area. It's probably one of the issues that we can look to address is how do we build mechanisms for people to have those networks? (S_P_G_5)

Training and business support, especially for access to international markets, was also considered an important input to local businesses and critical to business success in the regions:

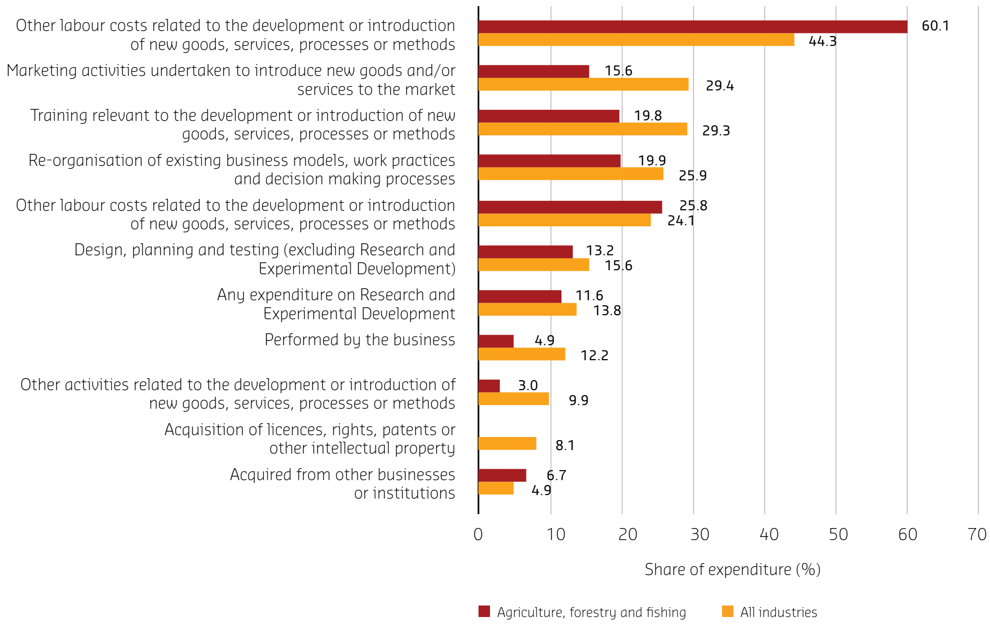
Yeah well, probably having the training they need too, and to tap into those markets and that understanding around them, they're not, they're new areas to them, so they've not been exposed to it before. Same with probably with export markets, I know we used to have a flower farmer in the district and he had to do a lot of groundwork himself to learn about export markets and chase all those markets himself. [He] [w]as completely on his own. (Joint interview: GS_KP_C_43/ GS_KP_A_53)

Access to specialist advice and knowledgeable experts in all aspects of business, but especially in marketing and product development, was considered an important input to business as well:

Having somebody like that, that you could speak to and get advice off of a more formal nature might be good. Somebody that you could get advice for marketing I suppose, and then maybe workshops or something like a visiting road show. Like if there was workshops with, I don't know, like a small business workshop that travels around to small areas and advertise well through industry bodies like the tourist association or whatever and try and get members to go along so they could exchange ideas and I know they do it a bit. (SW_BG_F_17)

Interestingly, Figure 29 shows that expenditure for marketing and training for introducing new goods is significantly lower in agriculture than for all other industries.

Figure 29 **Type of expenditure for innovation purposes, agriculture, farming and fishing and all industries, 2014 to 2015**



Source: Bond-Smith *et al.*, (2016).

Further to having a dedicated person and access to knowledge and training, participants mentioned that a one-stop shop for information about doing business, regulatory requirements and commercial expertise would be very helpful:

> *But also I think it's also a bit confusing in the market place because people don't immediately know where to go for information. So that's the other side of it. There is perhaps a lot of information out there but it's so scattered that it's very hard to try and find where the information that you particularly need is at any one point in time … no single specific place you can go to for all the information. It's not centralised. It's all over the place. (GS_A_G_45)*

> *What I'd say is, I think there's probably enough support. What we've found is sometimes it's extremely difficult to get to where you can actually get this stuff. Is it your South West Development Authority? Is it Tourism WA? Is it something else that the government's putting out there – the Department of Tourism or something like that? We seem to have a lot of bureaucracy stacked up amongst us, and I think people find it quite difficult to weave their way through. Where do you actually get to, to get this sort of support? (SW_BG_C_22)*

> *I think access to information is a big thing I think and it can't be a sort of private enterprise. I think that's where government can provide support in infrastructures to give people access to information to just have somebody you pick up the phone and go look, I need to do this can you tell me where to go and, bang, there's all the information you need …so just having that one-stop shop where they can lay out everything, saying look, this [sic] the operation you're doing, these are all the hoops you need to jump through; we don't realise there's hoops there. (SW_B_G_46)*

While people agreed that more official support would be really helpful, as seen in the quotes above, several people also mentioned that they wish for more support from internal sources. Some interviewees experienced discouragement from the community when they first started a new venture:

> *… if you do something different you're seen as some sort of weirdo, I suppose if you're not actually doing the standard thing that everyone else is doing, and maybe looked down upon a bit; so, maybe there's not that desire to support them. I mean there's plenty of people have tried different things, and our … guy that said to me don't do it, whatever we're doing, he said just don't do it because it'll take up too much time and you won't make any money. (GS_K_C_39)*

> *The biggest challenge is getting support. It's finding the avenue or help or assistance if you've got a product where you can go and sell it without having necessarily go to the farmers' markets in Cannington, the big markets, to try and sell a product. It's trying to find the small retail outlet that will take your product in that's prepared to help. (SW_BB_F_19)*

In addition to getting support for developing the product and making it market-ready, nearly all participants had ideas for marketing.

How can niche tourism be marketed for the south west?

Marketing was high on the agenda for farm produce, but especially in terms of tourism development. Participants acknowledged that they would need to be market-ready before substantial effort should go into marketing:

> *Yeah, I'm concerned about their business and marketing skills. I'm concerned at their naivety, and I'm concerned about their scale. Very difficult to be a successful business if every time someone says 'I love your product' and you say 'I'm sorry, it isn't here till next month' … so being able to deliver on your promise, or the perceived promise, might not have been explicit, but the customer might reasonably have assumed that you're offering a product and that you're going to be able to supply etc., I think that's a real challenge, particularly for the tiny businesses. (S_P_G_3)*

> *Yeah, from a tourism perspective we need a lot more done in product development, so we've done a lot of work in the Capes region here to really make sure that we've got a product that you can sell globally online, it's live, it's bookable, you can go there and experience it seven days a week. (SW_B_G_46)*

Frequently, the idea of product and region advocates or ambassadors was mentioned as a marketing tool. It was acknowledged that sharing personal stories or putting a face to the product would be probably one of the best ways to reach niche tourists. The Manjimup Food Council is already using local farmers and their voice to market the region. However, the idea of advocates was discussed more on an informal level and seen as a community effort:

> *If you're talking about communities having a better knowledge of the value of industry, I think that's important. And knowing what's available and being advocates of their area, that's probably important too. (S_P_G_5)*

> *I think success is where everybody celebrates what it is that we have, I mean we have a thriving wine industry down here and everybody is very aware of the wine industry, but we also have a thriving dairy industry and a lot of people have no idea about that. We produce an incredible amount of horticultural produce; you could ask the average person on the street and they wouldn't have a clue. I think success is where everybody, from the person on the street to the people going into the supermarkets to whoever, they know what we actually produce and they're ambassadors for it and they celebrate it and I think that would be success. (SW_B_G_46)*

Repeatedly, a unified marketing effort and branding of the region was discussed as essential to support a niche tourism strategy. There were different scales outlined, but a common theme was the need to combine efforts to promote the region as a whole, rather than use scare resources to promote only a small part of the area:

> *Well there's never enough money for marketing, and also, I would like to see greater cohesion in terms of the way things are marketed. It's very difficult for individuals or small groups of individuals to sustain marketing effort[s], and the best way to actually solve that problem is for people to be unified in their approach to branding and marketing. And there's enormous brand clout in other parts of Western Australia which we don't have, and we need to get closer to that space and make sure that we're – the common element used here, I guess is that we have all the fundamentals of appeal to broader markets, but we're probably not as good at developing and working our branding around all that, and our marketing more generally. (GS_A_G_40)*

> *Just for the record, there hasn't been, for example, a Great Southern Regional Tourism body responsible for marketing the whole region for probably 20 years here. It's a long time. Now that's not to say that there hasn't been some good tourism marketing, but of course there has because individual operators have been promoting and marketing themselves, but the region as a whole has been lacking that larger destination product message and people are also confused – so the research says – about the words 'Great Southern'. They don't really know perhaps what the Great Southern is, as opposed to if you mention Margaret River, because the Margaret River brand has been promoted for 30 plus years and it's been a fairly consistent message. (GS_A_G_45)*

> *Well, I think the branding thing is a great thing; I know Margaret River Wines for example, Margaret River is famous because they've made it famous, not because their wine is particularly better than anybody else's, it's just because they've made it famous; so it's about us getting together and branding our stuff I guess. Mount Barker Chickens are very successful, they probably don't even grow most of the chickens in Mount Barker, but it's Mount Barker Chickens so that's a branding thing, so I think that's really important. (GS_C_A_42)*

Marketing efforts were seen as particularly important as state and national tourism bodies brand Australia more as a beach location and therefore it was considered very important to have a joint, long-term marketing effort to raise awareness of the hinterland and its 'hidden treasures' in terms of agri-food niche tourism.

Can Australia offer more than ocean and beach tourism?

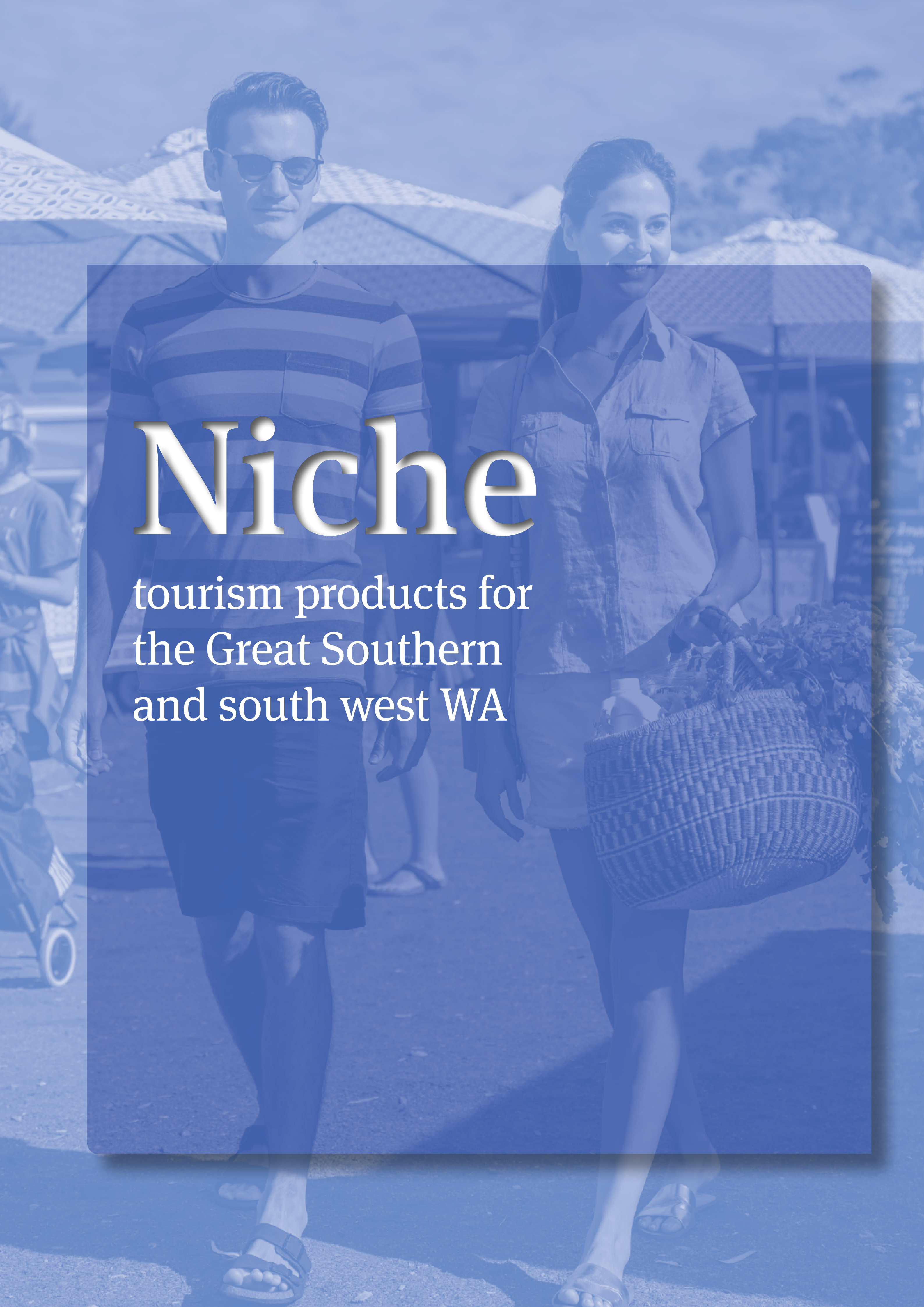
A challenge that was raised, but not mentioned as often as other concerns, was Australia's love for beach and ocean tourism. Interviewees suggested that state or nation-wide tourism campaigns based on coastal or surf tourism often neglected the rural areas. While tourism products based on the coastline and beach lifestyle are reasonably well represented, the peripheral or inland areas are not as well serviced by tourism marketing:

> *I think it's what always happens in Western Australia, is the interest is on the coast. You've got Perth, Bunbury, Albany, Geraldton, Broome, that's about it. Exmouth, that's – in terms of WA tourism – that's pretty much where the focus is – coastal – regional coastal towns or towns on the coast with an attraction. What is generally overlooked is what is in the rest of Western Australia, and there's a lot of interesting things there. (GS_K_C_38)*

> *One of the most disastrous things I've heard is the Premier say we should call this the 'South Coast'. I don't know if Mr Barnett's [previous WA Premier] ever been down here, but it's a long way from the coast and you can't change the Great Southern Region to the South Coast because some of us are 300 kilometres from the coast. So probably isn't going to work and if that became policy that would be absolutely disastrous for tourism. (GS_C_C_37)*

> *It's a tougher ask in Australia, because a lot of our momentum around tourism is focused around the ocean and proximity to the ocean, so Australians traditionally have a love of the ocean and the beach, so lifting people off the coast in tourism terms, or having them stop on their way to the coast, is an essential component but it's not an easy one. (GS_A_G_40)*

As a result of the analysis of the identified opportunities, such as building on the clean and green image and expanding the bushfood business and educational farm stays, and challenges, such as the distance to Perth, political borders and missing infrastructure, three specific niche tourism products for each of the two case areas were developed. The viability of each of these three tourism products was discussed by workshop participants in small groups in winter 2016 in workshops in Manjimup and Katanning.



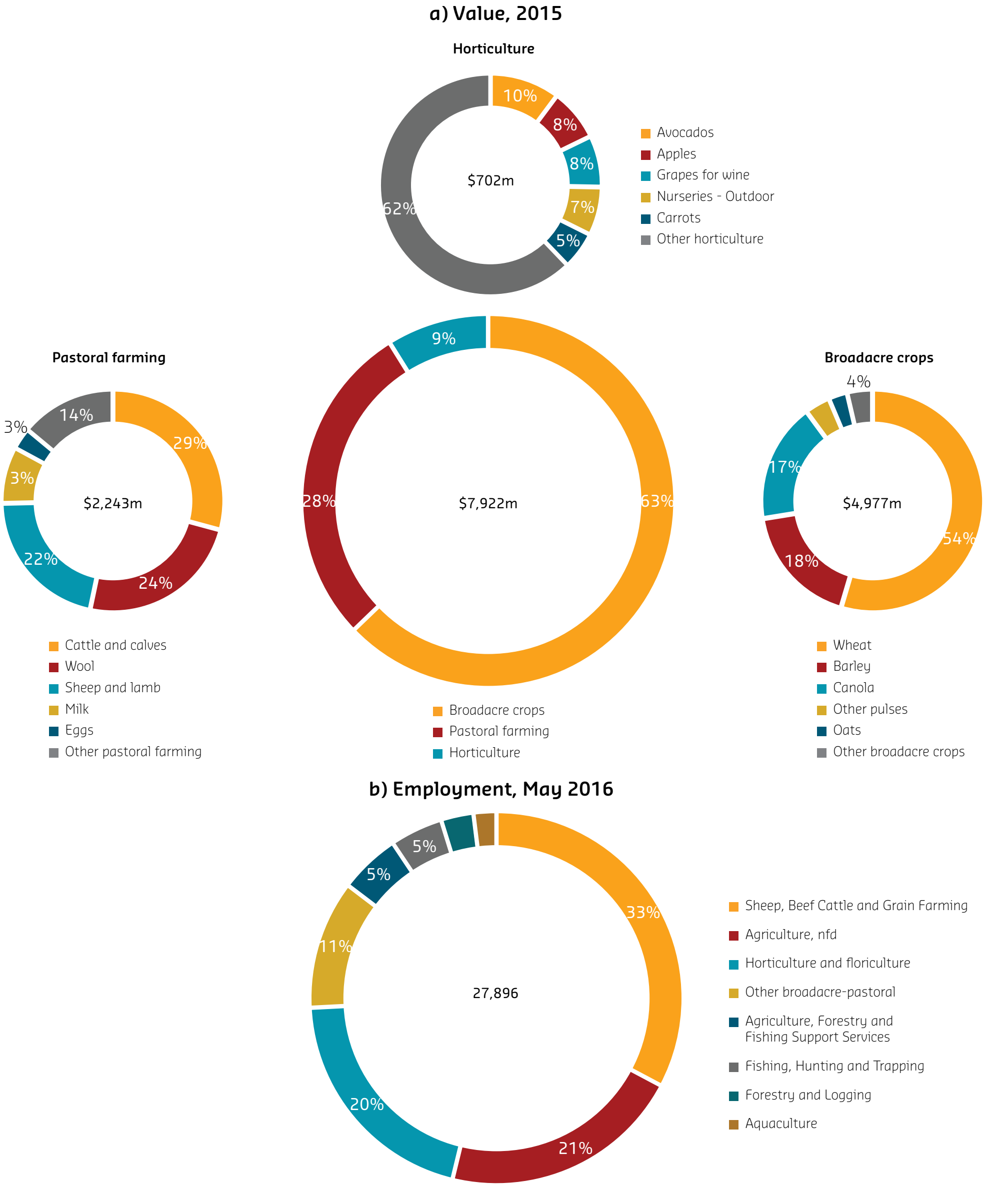
Niche

tourism products for the Great Southern and south west WA

Niche tourism products for the Great Southern and south west WA

This study investigates possibilities to use a niche tourism strategy to build on the wide offer of agricultural products in WA. Figure 30 and Table 9 give good insights into WA's agricultural industry. Figure 30 shows that the industry is dominated by cultivating a wide variety of fruits and vegetables, broadacre crops, cattle, sheep and lamb. That is consistent with the experience the researchers had while travelling and interviewing in the South West and Great Southern. More than 50 per cent of the regions' employment is in the agriculture, sheep, beef, cattle and grain farming businesses. While these are significant industries and employers for Western Australia, Table 9 displays that between 2012 and 2016 more than 2,000 businesses in this sector were lost. Combining the main categories of fruit and vegetable farming, broadacre grain farming, sheep, cattle and lamb farming with a niche tourism strategy could help businesses to survive easier in the future and bring more employment to regional and rural areas of WA.

Figure 30 WA's agricultural industry at a glance



Source: Bond-Smith *et al.*, (2016)

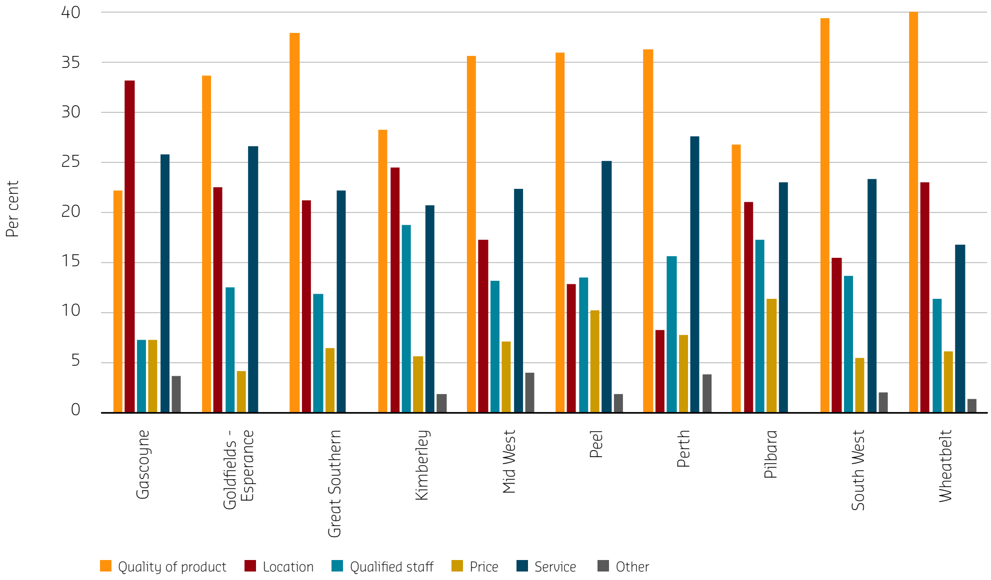
Table 9 Number of agriculture businesses in WA

Western Australia	Number of businesses (count)					Change	Share of 2016 businesses by # employees (ppt change since 2012)					
Agriculture sub-sector	2012	2013	2014	2015	2016	2012-16	None		1-19		20+	
Horticulture and floriculture												
Nursery Production (Under Cover)	43	41	40	41	40	-3	73%	+2.7	28%	+13.5	0%	-16.3
Nursery Production (Outdoors)	81	79	78	80	82	1	46%	+6.8	45%	+4.4	9%	-11.2
Turf Growing	52	50	48	48	45	-7	38%	-8.4	56%	+13.2	7%	-4.9
Floriculture Production (Under Cover)	22	21	20	14	13	-9	54%	-5.2	46%	+18.9	0%	-13.6
Floriculture Production (Outdoors)	78	69	64	58	55	-23	64%	+5.9	31%	-3.7	5%	-2.2
Mushroom Growing	6	4	5	4	6	0	50%	-	50%	-	0%	-
Vegetable Growing (Under Cover)	95	83	80	77	84	-11	73%	+4.2	27%	+2.1	0%	-6.3
Vegetable Growing (Outdoors)	673	670	640	645	618	-55	57%	-1.4	37%	+3.9	5%	-2.5
Grape Growing	927	880	839	768	720	-207	73%	+0.2	24%	+1.1	3%	-1.3
Kiwifruit Growing	8	9	9	4	3	-5	100%	-	0%	-	0%	-
Berry Fruit Growing	67	65	64	58	50	-17	56%	-12.7	34%	+14.6	10%	-1.9
Apple and Pear Growing	187	184	173	158	155	-32	45%	+0.1	42%	+5.0	12%	-7.1
Stone Fruit Growing	108	105	106	95	90	-18	48%	-2.2	52%	+7.8	0%	-5.6
Citrus Fruit Growing	90	90	88	79	78	-12	76%	-2.1	21%	+1.6	4%	+0.5
Olive Growing	149	132	111	99	83	-66	80%	-8.4	17%	+6.8	4%	+1.6
Beekeeping	90	88	84	86	87	-3	80%	-0.7	20%	+0.7	0%	+0.0
Other Fruit and Tree Nut Growing	530	473	426	405	368	-162	73%	-8.2	24%	+8.1	3%	+0.2
Total	**3,206**	**3,043**	**2,875**	**2,719**	**2,577**	**-629**	**65%**	**-2.7**	**31%**	**+5.0**	**4%**	**-2.5**
Pastoral and livestock												
Sheep Farming (Specialised)	1,591	1,567	1,530	1,475	1,421	-170	69%	+3.5	30%	-2.2	1%	-1.3
Beef Cattle Farming (Specialised)	2,195	2,180	2,126	2,126	2,082	-113	83%	-0.3	16%	+0.6	1%	-0.3
Beef Cattle Feedlots (Specialised)	18	14	14	16	16	-2	56%	+6.3	44%	+10.4	0%	-16.7
Sheep-Beef Cattle Farming	643	641	637	633	651	8	70%	+1.9	29%	-1.8	0%	-0.2
Dairy Cattle Farming	427	420	408	393	378	-49	63%	+1.8	36%	-1.5	1%	-0.3
Poultry Farming (Meat)	68	63	62	63	56	-12	38%	-11.0	63%	+15.4	0%	-4.4
Poultry Farming (Eggs)	54	54	50	48	49	-5	43%	+4.0	49%	-2.9	8%	-1.1
Deer Farming	7	8	7	8	8	1	63%	-	38%	-	0%	-
Horse Farming	298	313	286	289	289	-9	75%	+0.2	25%	+0.8	0%	-1.0
Pig Farming	91	87	86	88	87	-4	56%	+0.3	40%	-0.4	3%	+0.2
Other Livestock Farming n.e.c.	182	167	158	156	157	-25	81%	-4.3	17%	+4.0	2%	+0.3
Total	**5,574**	**5,514**	**5,364**	**5,295**	**5,194**	**-380**	**74%**	**+1.2**	**25%**	**-0.5**	**1%**	**-0.7**
Broadacre / broadacre-pastoral												
Grain-Sheep/Grain-Beef Cattle Farming	3,967	3,885	3,798	3,744	3,735	-232	54%	+0.5	46%	+0.0	0%	-0.5
Rice Growing	-	-	-	-	-	0	-	-	-	-	-	-
Other Grain Growing	2,282	2,256	2,204	2,203	2,145	-137	54%	-1.0	45%	+1.7	0%	-0.6
Sugar Cane Growing	13	10	12	13	12	-1	50%	-3.8	25%	-21.2	25%	+25.0
Cotton Growing	9	5	6	-	3	-6	100%	-	0%	-	0%	-
Other Crop Growing n.e.c.	172	154	149	137	130	-42	78%	+4.4	20%	-5.0	2%	+0.6
Total	**6,443**	**6,310**	**6,169**	**6,097**	**6,025**	**-418**	**55%**	**-0.1**	**45%**	**+0.6**	**1%**	**-0.5**
Aquaculture and fishing												
Offshore Longline & Rack Aquaculture	86	79	70	68	67	-19	61%	+3.1	31%	-4.7	7%	+1.6
Offshore Caged Aquaculture	-	-	-	-	3	3	100%	-	0%	-	0%	-
Onshore Aquaculture	129	122	121	103	97	-32	79%	+1.9	16%	-1.3	4%	-0.5
Rock Lobster and Crab Potting	818	770	735	738	743	-75	69%	+2.1	31%	-2.0	0%	-0.1
Prawn Fishing	87	90	61	58	74	-13	55%	-12.4	41%	+11.8	4%	+0.6
Line Fishing	117	110	89	86	85	-32	72%	-0.0	28%	+0.0	0%	+0.0
Fish Trawling, Seining and Netting	126	108	100	87	89	-37	66%	-3.5	30%	+4.9	3%	-1.4
Other Fishing	155	146	136	137	133	-22	73%	-0.6	25%	+0.3	2%	+0.3
Total	**1,518**	**1,425**	**1,312**	**1,277**	**1,291**	**-227**	**69%**	**+0.4**	**29%**	**-0.2**	**2%**	**-0.2**
Forestry												
Forestry	1,564	1,298	1,113	920	785	-779	91%	-3.9	8%	+3.0	1%	+0.5
Logging	111	106	96	92	89	-22	64%	-11.6	29%	+10.3	7%	+1.3
Hunting and Trapping	67	62	62	57	58	-9	88%	+5.8	12%	-1.4	0%	-4.5
Total	**1,742**	**1,466**	**1,271**	**1,069**	**932**	**-810**	**88%**	**-4.9**	**10%**	**+4.1**	**1%**	**+0.5**
Agriculture Forestry and Fishing Services												
Forestry Support Services	190	181	167	150	139	-51	71%	-0.9	27%	+3.5	2%	-2.6
Cotton Ginning	-	-	-	-	-	0	-	-	-	-	-	-
Shearing Services	271	253	242	239	227	-44	38%	-2.3	38%	+14.7	24%	-12.4
Other Agriculture and Fishing	997	981	963	978	983	-14	67%	+1.9	32%	-1.0	1%	-1.0
Total	**1,458**	**1,415**	**1,372**	**1,367**	**1,349**	**-109**	**62%**	**+1.2**	**32%**	**+2.6**	**5%**	**-3.7**
ALL AGRICULTURE BUSINESSES	19,941	9,173	18,363	17,824	17,368	-2,573	66%	-1.3	33%	+2.3	2%	-1.0

Source: Bond-Smith *et al.*, (2016).

As outlined in the introduction chapters, both study regions (the South West and Great Southern) are recognised for their high-quality products. Figure 31 reinforces this view, clearly showing that the South West and Great Southern are two cases that are very similar in nature regarding their competitive advantage, and therefore are two excellent cases to compare.

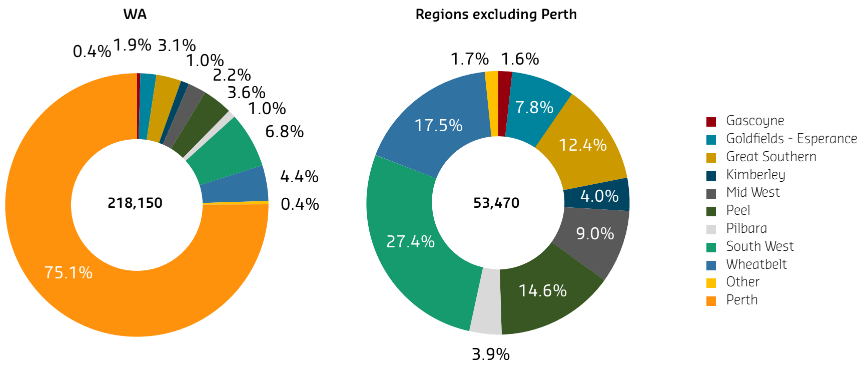
Figure 31 Main sources of competitive advantage, WA, 2017



Source: Bond-Smith *et al.*, (2017).

As seen earlier, both regions have tourism and agriculture as principal industries but with significant differences in value and employment numbers. In these categories, tourism is only a major player for the South West but not for the Great Southern. However, both industries are mentioned as important in shire-based regional blueprints and references are made for opportunities to combine these two. As discussed earlier, a niche tourism strategy on agriculture could be a viable possibility for regional development and growth. As niche tourism is not mass tourism, it is regularly built on the backbone of small businesses and entrepreneurs. In this context it is worthwhile to have a closer look at WA's small business data. Figure 32 reveals that the Great Southern and South West both have notably high numbers of small businesses, which is a good pre-condition for using a niche tourism strategy. However, Table 10 illustrates that numbers have been more or less stagnant for the last decade. A regional development approach building on niche tourism could boost these numbers significantly.

Figure 32 Number of small businesses in WA, by region, 2016



Note: As a result of ABS pertubation for areas with low level values the data presented at detailed levels will not always be additive. Data rounded to nearest 10. Regions total excludes the category 'Other'.
Source: Bond-Smith *et al.*, (2017).

Table 10 Number of small businesses in WA, by region, 2011 to 2016

Region	2011		2012		2013		2014		2015		2016	
	Count	Per cent	Count	Per cent	Count	Per cent	Count	Per cent	Count	Per cent	Count	Per cent
Gascoyne	970	0.4%	950	0.4%	960	0.5%	930	0.4%	930	0.4%	950	0.4%
Goldfields -Esperance	4,560	2.1%	4,470	2.1%	4,290	2.1%	4,230	2.0%	4,210	2.0%	4,250	1.9%
Great Southern	6,970	3.2%	6,810	3.2%	6,580	3.1%	6,700	3.2%	6,710	3.1%	6,710	3.1%
Kimberley	2,400	1.1%	2,390	1.1%	2,290	1.1%	2,260	1.1%	2,220	1.0%	2,190	1.0%
Mid West	5,300	2.4%	5,140	2.4%	4,980	2.4%	5,000	2.4%	4,930	2.3%	4,890	2.2%
Peel	8,030	3.7%	7,790	3.6%	7,440	3.6%	7,550	3.6%	7,770	3.6%	7,940	3.6%
Perth	159,450	73.6%	159,070	73.8%	154,590	73.9%	157,410	74.4%	160,010	74.7%	163,800	75.1%
Pilbara	2,250	1.0%	2,340	1.1%	2,280	1.1%	2,280	1.1%	2,210	1.0%	2,100	1.0%
South West	15,270	7.0%	14,910	6.9%	14,500	6.9%	14,700	6.9%	14,660	6.8%	14,920	6.8%
Wheatbelt	10,120	4.7%	9,690	4.5%	9,440	4.5%	9,680	4.6%	9,580	4.5%	9,530	4.4%
Other	1,290	0.6%	1,850	0.9%	1,720	0.8%	890	0.4%	850	0.4%	880	0.4%
Total	**216,590**	**100%**	**215,410**	**100%**	**209,070**	**100%**	**211,640**	**100%**	**214,060**	**100%**	**218,150**	**100%**

Source: Bond-Smith *et al.*, (2017).

Table 11 discloses another interesting similarity between the Great Southern and South West. In terms of ranking of industry of established small businesses, agriculture ranks first in the Great Southern and second in the South West. It is these kinds of data that support the idea to develop a regional growth strategy for both regions based on an agri-food niche tourism approach. This manifests even more when we have a close look at Table 12, which shows that in both regions these are mainly non-employing businesses. Table 13 depicts that agriculture ranks reasonably high by business counts, but reconfirms that employment in this industry is low and that economic value is even lower in comparison to other industries in WA. Growing the core agricultural business around a tourism strategy should bring extra employment and economic value to the regions, resulting in increased wellbeing for local communities.

Table 11 Industry distribution of small businesses in regional WA, 2016

Industry	Gascoyne		Goldfields-Esperance		Great Southern		Kimberley		Mid West		Peel	
	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank
Agriculture, forestry and fishing	255	1	790	1	2,405	1	190	3	1,400	1	640	3
Mining	5	16	185	9	20	18	5	19	40	15	40	17
Manufacturing	30	10	135	12	240	10	75	11	135	11	295	10
Electricity, gas, water and waste services	5	16	10	19	15	19	10	18	20	18	30	19
Construction	165	2	640	2	870	2	470	1	725	2	2,100	1
Wholesale trade	15	13	85	14	110	13	55	13	95	13	205	13
Retail trade	70	5	265	7	385	4	190	4	290	6	490	7
Accommodation and food services	55	6	170	10	255	8	115	9	180	9	245	12
Transport, postal and warehousing	90	3	280	6	300	7	150	5	300	5	630	5
Information media and telecommunications	5	19	15	18	25	17	15	17	5	20	25	20
Financial and insurance services	30	8	290	4	330	6	120	8	370	4	540	6
Rental, hiring and real estate services	75	4	445	3	630	3	240	2	420	3	725	2
Professional, scientific and technical services	30	9	250	8	375	5	145	6	245	8	640	4
Administrative and support services	30	10	130	13	150	12	100	10	115	12	280	11
Public administration and safety	5	19	5	20	10	20	5	19	15	19	30	18
Education and training	5	16	35	16	40	15	20	16	30	17	80	16
Health care and social assistance	20	12	150	11	215	11	65	12	165	10	340	9
Arts and recreation services	10	15	25	17	25	16	25	15	30	16	90	15
Other services	40	7	285	5	240	9	135	7	250	7	425	8
Currently unknown	15	14	50	15	65	14	50	14	65	14	90	14
Total	**950**		**4,245**		**6,715**		**2,190**		**4,885**		**7,940**	
Percentage	0.4%		1.9%		3.1%		1.0%		2.2%		3.6%	

Note: Data rounded to nearest 5.
Source: Bond-Smith *et al.*, (2017).

Table 11 Industry distribution of small businesses in regional WA, 2016 (cont.)

Industry	Perth		Pilbara		South West		Wheatbelt		Other		Total		Percentage
	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank	
Agriculture, forestry and fishing	3,430	13	90	10	2,735	2	4,530	1	135	1	16,600	5	7.6%
Mining	2,145	15	25	16	45	18	45	15	65	6	2,625	15	1.2%
Manufacturing	6,195	9	60	12	640	8	250	9	50	8	8,110	10	3.7%
Electricity, gas, water and waste services	470	20	15	19	45	18	25	18	5	17	655	19	0.3%
Construction	31,810	1	480	1	3,140	1	1,015	2	90	3	41,500	1	19.0%
Wholesale trade	5,300	12	35	14	315	13	185	11	30	12	6,435	13	2.9%
Retail trade	8,680	7	120	8	940	6	465	5	35	10	11,920	7	5.5%
Accommodation and food services	5,455	11	95	9	630	9	245	10	35	9	7,485	12	3.4%
Transport, postal and warehousing	11,480	5	180	3	555	11	515	4	60	7	14,540	6	6.7%
Information media and telecommunications	1,220	18	5	20	70	17	10	19	5	17	1,400	18	0.6%
Financial and insurance services	16,835	4	130	7	1,085	5	385	6	75	5	20,190	4	9.3%
Rental, hiring and real estate services	18,840	3	235	2	1,435	3	675	3	105	2	23,825	3	10.9%
Professional, scientific and technical services	22,555	2	135	6	1,125	4	335	8	80	4	25,915	2	11.9%
Administrative and support services	6,110	10	135	5	440	12	155	12	25	14	7,665	11	3.5%
Public administration and safety	480	19	15	17	35	20	5	20	-	19	610	20	0.3%
Education and training	1,920	16	35	15	130	16	45	17	10	16	2,345	16	1.1%
Health care and social assistance	9,390	6	85	11	590	10	150	13	30	11	11,190	8	5.1%
Arts and recreation services	1,800	17	15	17	145	14	45	16	-	19	2,215	17	1.0%
Other services	7,070	8	155	4	675	7	365	7	20	15	9,660	9	4.4%
Currently unknown	2,615	14	50	13	145	15	80	14	25	13	3,255	14	1.5%
Total	**163,800**		**2,100**		**14,915**		**9,530**		**880**		**218,150**		**100%**
Percentage	75.1%		1.0%		6.8%		4.4%		0.4%		100%		

Note: Data rounded to nearest 5.
Source: Bond-Smith *et al.*, (2017).

Table 12 Industry composition of non-employing business in regional WA, 2016

Industry	Gascoyne		Goldfields-Esperance		Great Southern		Kimberley		Mid West		Peel	
	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank
Agriculture, forestry and fishing	155	1	450	1	1,555	1	125	3	775	1	475	3
Mining	5	14	130	6	15	18	-	20	20	16	30	17
Manufacturing	25	6	60	12	125	8	45	10	75	10	165	10
Electricity, gas, water and waste services	5	14	5	19	10	19	5	18	10	18	20	20
Construction	110	2	340	3	535	3	265	1	445	2	1,325	1
Wholesale trade	5	16	40	13	55	13	30	14	50	13	120	12
Retail trade	25	7	100	9	140	7	65	8	95	8	210	7
Accommodation and food services	20	8	40	15	75	12	45	9	60	11	80	13
Transport, postal and warehousing	45	4	170	5	190	6	90	5	185	5	445	5
Information media and telecommunications	5	16	10	18	15	17	5	17	5	20	20	18
Financial and insurance services	30	5	255	4	280	4	105	4	325	4	460	4
Rental, hiring and real estate services	55	3	375	2	580	2	200	2	380	3	615	2
Professional, scientific and technical services	15	9	115	7	235	5	90	6	145	6	385	6
Administrative and support services	10	12	60	11	90	11	40	11	60	12	165	11
Public administration and safety	5	16	5	20	5	20	5	19	10	19	20	18
Education and training	5	16	20	16	30	15	10	16	20	17	45	16
Health care and social assistance	10	13	75	10	120	9	35	13	85	9	205	8
Arts and recreation services	5	16	15	17	20	16	10	15	20	15	50	15
Other services	15	9	110	8	115	10	70	7	120	7	195	9
Currently unknown	15	11	40	13	50	14	40	12	50	14	65	14
Total	**550**		**2,415**		**4,230**		**1,275**		**2,935**		**5,085**	
Percentage	0.4%		1.7%		3.0%		0.9%		2.1%		3.6%	

Source: Bond-Smith *et al.*, (2017).

Table 12 Industry composition of non-employing business in regional WA, 2016 (cont.)

Industry	Gascoyne		Goldfields-Esperance		Great Southern		Kimberley		Mid West		Peel		Percentage
	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank	Count	Rank	
Agriculture, forestry and fishing	2,590	12	65	8	2,045	2	2,590	1	75	2	10,895	6	7.8%
Mining	1,370	15	15	15	30	18	25	16	25	8	1,665	15	1.2%
Manufacturing	2,890	10	40	11	335	7	140	9	30	7	3,930	11	2.8%
Electricity, gas, water and waste services	260	20	5	19	25	19	20	17	5	16	370	19	0.3%
Construction	21,010	1	275	1	2,085	1	625	2	65	3	27,080	1	19.3%
Wholesale trade	2,770	11	20	14	180	13	110	10	15	11	3,400	12	2.4%
Retail trade	3,835	7	50	10	345	6	175	8	10	12	5,040	8	3.6%
Accommodation and food services	1,545	14	30	13	200	12	80	12	10	13	2,175	14	1.6%
Transport, postal and warehousing	9,095	5	100	4	335	7	290	5	40	5	10,985	5	7.8%
Information media and telecommunications	845	18	5	18	40	17	10	19	5	16	965	18	0.7%
Financial and insurance services	13,980	3	120	3	930	4	320	4	40	6	16,840	3	12.0%
Rental, hiring and real estate services	16,165	2	200	2	1,230	3	595	3	80	1	20,465	2	14.6%
Professional, scientific and technical services	13,070	4	65	7	660	5	215	6	45	4	15,050	4	10.7%
Administrative and support services	3,520	8	75	5	230	11	95	11	10	13	4,355	10	3.1%
Public administration and safety	300	19	5	20	15	20	5	20	-	19	365	20	0.3%
Education and training	1,075	17	15	16	75	16	15	18	5	16	1,310	17	0.9%
Health care and social assistance	5,595	6	50	9	335	7	75	13	20	10	6,605	7	4.7%
Arts and recreation services	1,190	16	10	17	100	15	30	15	-	19	1,450	16	1.0%
Other services	3,340	9	70	6	320	10	205	7	10	15	4,565	9	3.3%
Currently unknown	2,035	13	40	12	115	14	65	14	20	9	2,545	13	1.8%
Total	**106,490**		**1,255**		**9,630**		**5,685**		**500**		**140,055**		**100%**
Percentage	76.0%		0.9%		6.9%		4.1%		0.4%		100%		

Source: Bond-Smith *et al.*, (2017).

Table 13 Ranking of WA industries by business counts, employment and economic value

Industry	Business counts	Number employed	Economic value	Business counts	Number employed	Economic value
	No.	No.	$ (m)		Rank	
Accommodation and food services	7,858	71,760	3,265	11	9	16
Administrative and support services	7,728	48,124	7,565	12	12	8
Agriculture, forestry and fishing	17,818	34,015	3,252	5	14	17
Arts and recreation services	2,235	22,556	971	16	17	19
Construction	40,080	130,499	31,303	1	3	2
Education and training	2,344	98,236	7,061	15	6	10
Electricity, gas, water and waste services	701	22,132	5,141	19	18	13
Financial and insurance services	18,591	32,848	7,463	4	15	9
Health care and social assistance	10,427	140,624	10,928	8	1	6
Information media and telecommunications	1,421	15,800	3,006	17	19	18
Manufacturing	8,977	91,546	12,099	10	7	4
Mining	2,999	114,600	70,867	14	4	1
Other services	9,437	53,739	3,309	9	11	15
Professional, scientific and technical Services	25,708	102,761	13,152	2	5	3
Public administration and safety	714	72,944	6,900	18	8	11
Rental, hiring and real estate services	23,181	23,272	4,246	3	16	14
Retail trade	13,096	136,622	8,483	7	2	7
Transport, postal and warehousing	13,837	64,003	11,586	6	10	5
Wholesale trade	6,730	41,806	6,077	13	13	12

Note: Industries are ANZSIC is 1-digit level. Economic value is measured as industry gross value added (IGVA).
Source: Cassells *et al.* (2015)

As discussed intensively during the analysis of the interviews, identifying target markets and an appropriate marketing strategy were big topics for regional participants. Figure 33 indicates major existing export markets for agricultural products from WA; one way forward in regard to marketing and tourism target markets could be to build on these existing relationships.

Figure 33 WA's agriculture exports with major country partners, 2008 to 2015

Note: Financial year basis.
Source: Bond-Smith *et al*., (2016).

After analysing the 37 interviews that were undertaken in the South West and Great Southern and the two interviews that were undertaken in Perth with political bodies, it was evident that both areas would need tailored tourism strategies in accordance with the special circumstances of each shire:

> *... I guess, frankly, having seen a lot of these sorts of things for a long time, you have to be realistic about what you can actually do – been lots of dreams in agricultural areas about tourism, and most of them have failed ... (S_P_G_3)*

While both regions have lots of similarities, major differences were the agricultural products, the existing tourism infrastructure, the diverse population and the scale of the farms. The Great Southern is characterised by broad-acre, big-business farms, a more diverse population in terms of Indigenous and foreign backgrounds and a lack of existing tourism infrastructure, while tourism infrastructure in the South West is underdeveloped but existing, farms are often small, a hobby or a lifestyle choice and the region comprises a much more uniform population.

After the interviews were conducted, transcribed and analysed, workshops in Katanning and Manjimup were organised and invitations were issued to interviewees and the broader community. A learning community around community capital and industry-clustering frameworks, together with definitions and allied concepts for niche tourism and agri-food, were presented. The potential for each region to operate within a niche tourism strategy was put forward and explored. Research findings were presented and suggestions were presented for both areas, emphasising three different tourism ideas. Workshop participants were distributed on different tables to ensure a good mix of stakeholders and shires were represented at each table. Ideas discussed covered topics that investigated the viability and sustainability of the initiatives, including:

- set-up/governance;
- target market;
- resources;
- marketing;
- financing;
- timeline; and
- challenges.

The next section introduces the suggested niche tourism products and some regional circumstances, but does not discuss the outcomes of the workshops. The workshops were conducted as part of the commitment to deliver not only a theoretical outcome as part of this research project but to giving hands-on feedback to the region and enabling local stakeholders to take the outlined ideas forward.

South West: Hobby farmers, tourism and lifestyle choices

The shires under investigation in the South West are characterised by vibrant little farms, often bought by foreigners or Australians who came home or wanted to settle after living and working in other parts of Australia or overseas. The shires are in relative proximity to Margaret River, with driving time, for example, to Margaret River from Nannup of under one hour.

A highly diverse range of produce is farmed in the shires, with a tendency towards boutique hobby farmers in Nannup and Bridgetown and larger-scale farming in Manjimup. Manjimup is not only a selected SuperTown (Government of Western Australia, 2012) but is also home to one of the major tourism attractions: The Truffle Farm. Different festivals take place all throughout the year; for instance, the Flower and Garden Festival in Nannup, The Truffle Kerfuffle in Manjimup and the long-table lunch in Bridgetown. Regular farmers' markets exist in Nannup and Manjimup.

Taking the regional circumstances into account, the following possible niche tourism products were identified:

1. Gourmet Food and Art – Art galleries and a gourmet restaurant strip next to a 5-star hotel, including cooking classes in Manjimup.
2. Farm Tour Tourist Bus Itinerary – 'Special interest farms', such as honey, chestnuts, truffles, organic or biodynamic farms, cidery, olive oil, lavender, etc.
3. Bike Trail and Gourmet Food.

Gourmet food and art

At the time of the research, Manjimup´s main street had many empty and outdated shops, and plans for a new development of a 4–5-star hotel were underway. A few new modern restaurants had been recently established in the town, but it was felt that building a cluster around the hotel and combining it with art galleries (some urban art was found in Manjimup) would recover Manjimup's town centre and could especially attract Chinese tourists (the missing high-quality accommodation option was mentioned a few times as a major impediment to tap into the Chinese tourist market). Apart from the gourmet strip next to the hotel, the offer could be expanded by offering tourists a bus tour with local dining and creative experiences in the evenings following, for example, a day spent on a farm tour in neighbouring shires. In that way, the rising tourism numbers would not only benefit the shire or town of Manjimup but also surrounding towns and shires. This initiative would not only need the successful construction and operation of the new hotel but would also need incentives for restaurants and art galleries to set up in the area and a massive marketing campaign to reach the critical mass.

Farm tour tourist bus itinerary – 'Specialist farms'

Many small and specialised (boutique) farms exist in the shires of Nannup, Bridgetown and Manjimup. One constraint mentioned frequently by farmers was the limiting time factor to accompany tourists, and the uncertainty about when and how many tourists would arrive and on which days. Concerns were raised that the arrival of tourists in small numbers throughout the day would interrupt too much of a farmer's daily work. Therefore, an organised farm tour tourist bus, leaving every day at the same time from the Tourism Information Centre in Margaret River and picking up tourists from the new hotel in Manjimup, was suggested. This venture would be relatively easy to set up with low costs involved. However, it would need a collaborative approach between the farms, a tour or bus operator and the tourism information centre in Margaret River.

Bike trail and gourmet food

The third suggestion for the region to develop a niche tourism perspective and strategy builds on the already existing Munda Biddi Trail that has part of its route through Nannup and Manjimup, together with the variety of produce in the three different shires. During the workshop it was discovered that a bike 'Rail Trail' is being progressed as part of a rail trail niche tourism strategy. The trail is proposed to begin in Bunbury and has been mapped across a decommissioned rail line within the South West region. This is excellent news, as locals could easily join forces with this initiative. To make this idea a reality, a joint effort between accommodation providers, local eateries and farms would be needed. With a bit of effort it should be easy to set up a foodie bike trail and attract bike enthusiasts who value good food and wine. While bicycle holidays exist in many parts of the world, it should be easy to work out the competitive advantage of the South West when looking at global best practices.

Increasing tourism numbers before the implementation of any of the niche tourism products for the South West

Apart from the three definite niche tourism ideas, some general recommendations to improve tourism numbers for the South West were given by the consultant. As a result of the site assessments and the interview data, the following courses of action were recommended for the shires of Manjimup, Nannup and Bridgetown-Greenbushes:

- Reliable and consistent opening hours that align with advertised opening hours.
- Develop a tourism strategy based on boutique farm visits and local food that brings a more constant flow of tourists but in defined ways that do not interrupt unnecessarily the flow of farm work.
- Educate the local community to become ambassadors and advocates for local food products.
- Implement a uniformed marketing and labelling strategy to support 'boutique local products'.

- Leverage the proximity to the more well-known and recognised Margaret River region (brief and educate staff at the Tourism Information Centre in Margaret River) to encourage wider exploration of the hinterland areas.
- Build alliances and co-ordinated efforts to benefit from economies of scale and advertisement of the tourism region.
- Have a well-organised weekly farmers' market in heart of town selling local produce and food.
- Use personal stories to communicate the regional strengths about small-scale boutique farms and unique agricultural products.
- Expand the marketing strategy further than Australia and China.
- Upgrade the main street in Manjimup.
- Establish sister-city agreements with cities in target markets.
- Cater for the target market in terms of food that is locally sourced and offered in cafes and restaurants, and accommodation and accommodation services that are world class, competitively priced and 'cosy'.
- Make use of existing organisations in WA and Australia and their networks (e.g. Chambers of Commerce, Tourism Australia, embassies, etc.).
- Apply for grants to development commissions and government bodies in Perth.
- Get external help to kick-start projects and provide specialist advice.

The Great Southern: The land of the sheep, the Stirling Range and cultural diversity

The shires that were included in this research in the Great Southern are characterised by huge farms, vast empty land, the biggest sheep saleyard in the Southern hemisphere, the beautiful Stirling Range and the main highway from Perth to Albany that goes through Kojonup. Katanning is not only an elected SuperTown (Government of Western Australia, 2012) but is also known for its multicultural population, being the most ethnically diverse regional centre in WA.

A regular farmers' market is organised in Katanning but is mostly unknown to the local population. Some smaller events are organised throughout the year, such as the Harmony Festival in Katanning or food-appreciation evenings in Gnowangerup. Distances to main tourism centres are huge, with a driving time of approximately 3 hours to Perth and Margaret River and a little less to Albany. Major tourist attractions are the Stirling Range, the wildflowers, the sheep saleyard and the Kodja Place (a museum that tells the story of the local Indigenous population and Australian country life). The coffee chain DÔME is building its first boutique hotel in the historic flour mill in the centre of Katanning.

Taking the regional circumstances into account, the following niche tourism products were put forward for discussion:

1. Agriculture and Educational Tourism (based around educative Farm Tours).
2. Unique food experiences (international food and bush tucker).
3. Writers/artists-in-residence in home stays with home-cooked, locally sourced food.

Agriculture and educational tourism

As discussed in the interview findings, the broad-acre farms in the Great Southern region were seen as particularly interesting for agriculture students and farmers from other countries to experience and learn about farm life. This initiative would surely need some collaboration with national and international education providers, and may even require some kind of certification. Nevertheless, it could be not only an opportunity to bring new tourists to the area but also to increase the knowledge exchange between local farmers and national and international farmers. As a result, local farmers would maybe not only have some extra income through tourism but could also develop new skills and expertise in the farming business.

Unique food experiences

The shires of Katanning, Kojonup and Gnowangerup in particular have a high population with Indigenous heritage and diverse immigrant groups. All groups that were interviewed expressed interest in presenting native food to a wider audience. Furthermore, a high number of entrepreneurs were identified in the area. Infrastructure to support these start-up enterprises is available, comprising a functioning commercial kitchen (former sheep saleyards in Katanning) that could be used as a cultural hub to experiment with food fusion. Findings indicated that the food of local residents from the many different cultures represented in the region would provide the basis for a multicultural food strategy as a niche tourism approach.

Recommendations include opportunities to facilitate international or food-fusion restaurants in the heart of Katanning to increase its visibility and vibrancy for tourists.

The unique food experience is being progressed in a niche tourism strategy of international food available through pop-up events and food vans, and developing an 'eating out' culture within the region. A joint collaborative effort, probably led by the Shire of Katanning, could easily make this idea a reality as preconditions are favourable.

Writers/artists-in-residence – Homestay

Writers/artists-in-residence in homestay accommodation is a niche tourism concept in which writers and artists who want to concentrate for several weeks or months on their work travel to more remote areas that are without distractions.

The huge farms, the beautiful landscape of the Stirling Range and the desire of locals to make homemade, locally-sourced meals were seen as an excellent combination to offer a niche tourism product that would also fit the character of the locale and the capability of the local residents to start microbusinesses in the hospitality arena, bringing tourism income to an area that lacks plentiful tourism infrastructure across the region. Apart from some niche marketing efforts, this initiative would probably not need much more than the commitments of a few farms.

Increasing tourism numbers before the implementation of any of the niche tourism products for the Great Southern

Apart from the three definite niche tourism ideas, the consultant gave some general recommendations at the local workshop to improve tourism numbers for the Great Southern. As a result of the site assessments and the interview data, the following courses of action were recommended for the shires of Katanning, Kojonup, Cranbrook and Gnowangerup:

- Extended opening hours in the towns and ensure that there is clear signage about the attraction and its opening hours.
- Develop a tourism strategy that brings a more constant flow of tourists focused on the unique geography of the Stirling Ranges and topography of the region.
- Educate the local community to understand tourist expectations and requirements.
- Allocate resources for a dedicated person who knows about regulation and also applies for grants.
- Implement a uniform marketing and labelling strategy that is allied to the branding of the region.
- Leverage the Albany and Margaret River region (brief and educate staff at Tourism Information Centres in Albany, Perth and Margaret River).
- Build alliances to benefit from economies of scale and advertising the tourism region.

- Have a well-organised weekly farmers' market in the heart of towns and advertise it well.
- Collate and market the appeal of the region through personal stories of local entrepreneurs and farmers.
- Expand the marketing strategy further than Australia and China.
- Implement stakeholder management to collaborate to achieve niche tourism goals and objectives.
- Establish sister-city agreements with international cities in target markets.
- Target a new market in terms of Indigenous food and international food from the diverse multi-cultural groups within the region.
- Connect with development commissions and government bodies in Perth to understand how the regional opportunities fit into the overall tourism and regional development strategy, and apply for grants to support the identified initiatives.
- Get external help to kick-start projects and provide specialist advice.

Discussion

and conclusion

Discussion and conclusion

From the economic data it is evident that WA needs to diversify its economy after the end of the mining boom. Tourism is one of the fastest-growing sectors of global business, with increases in outbound tourism steadily rising since the 1950s. International research suggests that niche tourism, and in particular a combination of agriculture and tourism, can be a drawcard for tourism in less attraction-favoured rural regions (Prideaux, 2002; Novelli and Benson, 2005).

Geographically, the south west region of WA encompasses the political regions of Goldfields-Esperance, Wheatbelt, Great Southern, South West and Peel. This study identified two case study regions based around the two SuperTowns of Manjimup in the South West and Katanning in the Great Southern. For the South West, the shires of Manjimup, Nannup, Bridgetown-Greenbushes and, to a limited extent, Boyup Brook were included. For the Great Southern, shires of Katanning, Kojonup, Cranbrook and Gnowangerup were taken under investigation.

In both case study areas the idea of agri-tourism was not new, as this strategy was evident in the document analysis and mapping using Leximancer. Interviews with government bodies, retailers and farmers in the regions revealed wide support for niche tourism in agriculture. The thematic analysis of the interviews and the Leximancer analysis of the policy documents were consistent that support is, in general, higher in the South West than the Great Southern as a result of more tourism products already existing in the South West.

Analysis of interview data uncovered major challenges reported as impediments for a regional tourism strategy based on agri-tourism, including: distance to Perth, lack of alternative transport options to car usage, geographic borders that are not aligned to local government political borders, missing infrastructure, a lack of coordination and collaboration across the shires (especially relating to marketing and branding), a lack of guidance and support for implementation and enacting entrepreneurial ideas, competing against ocean and beach tourism, regulation, scale, and farmers not having enough time for tourism.

Supporting aspects, such as the clean and green image of the region, supply and knowledge of bushfood, the existence of small-scale holdings that give rise to boutique produce, availability of farm stays and educational farm visits, and opening-up of new markets, were perceived by respondents as opportunities for agri-tourism development.

At regional workshops three niche tourism products for each case region were presented by researchers and discussed by participants in small groups. The workshops offered the opportunity for local residents to take ideas forward.

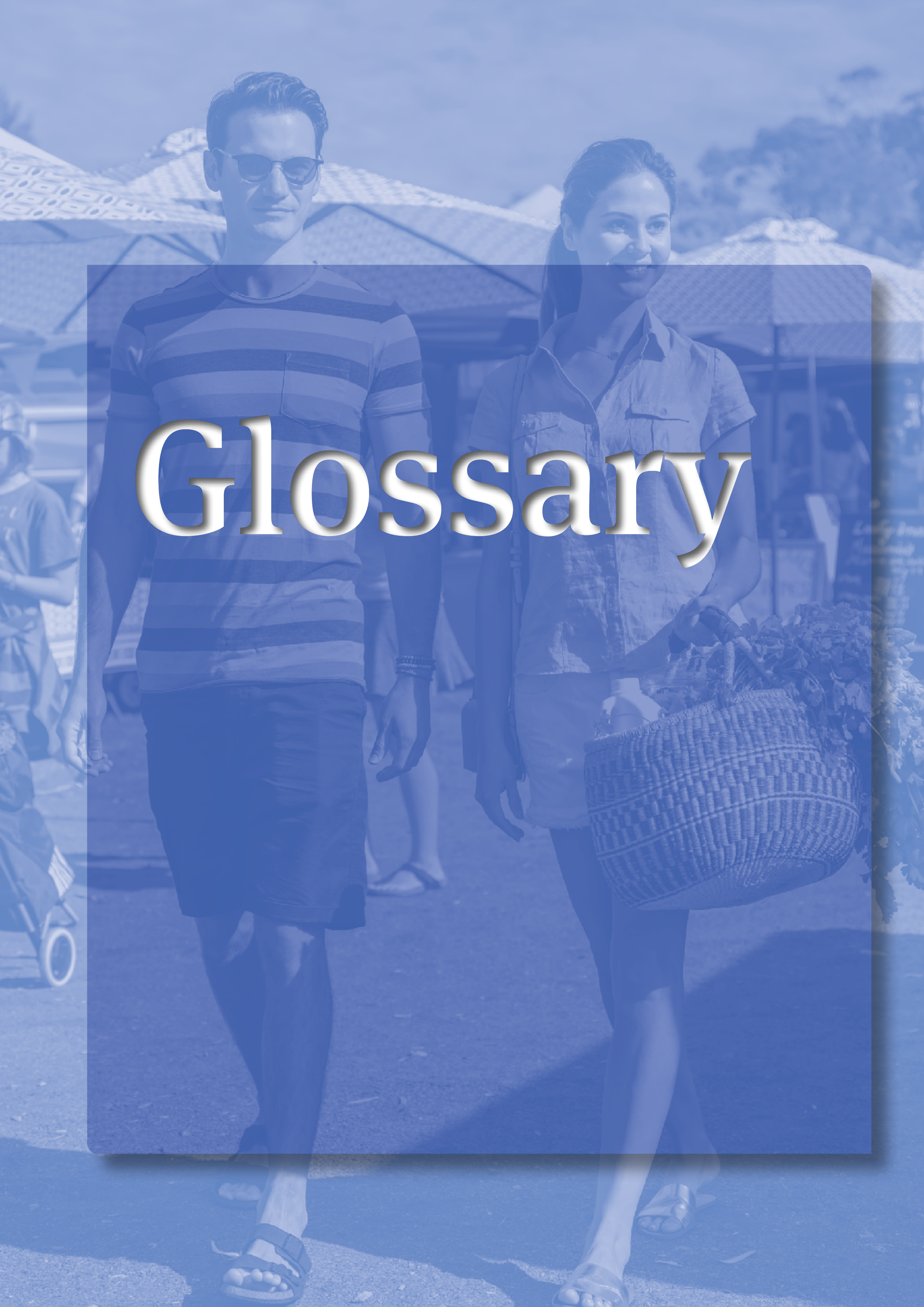
Findings of this report will have a wide impact on decision-makers in Perth and local councils, the report provides rich data and deep insight into how funding can be spent efficiently to increase GDP and lower unemployment in regional WA. The links to the regional development plans through land-use planning, regional strategies and plans, and 'hot spot' identification of the case study regions, together with analysis of the economic opportunities of sub-regions within the South West, align extremely well with the focus area of regional economic and social development through adding value to core activities within the region.

Furthermore, ideas that were presented at the workshops and the deep insight into opportunities and impediments for agri-tourism will encourage investors and entrepreneurs to take up some of the presented ideas. Last but not least, workshops fostered a more regional approach towards tourism, and initial collaboration efforts between different shires and individual participants are starting to manifest.

This report examined the prospects for developing a tourism strategy based on the concept of niche tourism that offers small-scale, distinctive tourism experiences related to the unique combination of agri-food and food-related products within a rich landscape that supports the most diverse flora in Australia, to support regional development in the South West region of WA. The bundling of activities beyond agriculture and farming through niche tourism in agri-food and related boutique food landscapes is argued to support more resilient regions in WA's South West.

The elements to deliver this niche tourism strategy are demonstrated to be available to the region through the carefully selected niche tourism approaches put forward to the regional workshops. These strategies build on the unique features of the region's small farms, boutique local products, the beginnings of collaborative and relational approaches to destination amenity, and are closely allied to the anchor activities. However, challenges of distance, accessibility and availability of tourism infrastructure are important to overcome. Peripheral regions face additional difficulties in attracting tourists, as posited by Prideaux (2002), but the unique attributes of regions can attract tourists to desirable and interesting destinations and overcome the delimiting factors of distance and competition from other less-costly destinations.

Glossary



Glossary

Agri-food

Business of producing food agriculturally as opposed through, fishing, hunting, etc.

Agri-tourism

Travel organised around farming, small-scale food production or animal husbandry.

GDP

Gross domestic product.

GSP

Gross state product.

Leximancer

Content analysis software that indicates relationships between different concepts.

LGAs

Local Government Areas.

Niche tourism

Tourism strategy that supports a unique, value-added tourism experience.

Thematic analysis

Technique to recognise patterns in qualitative data including interview transcripts.

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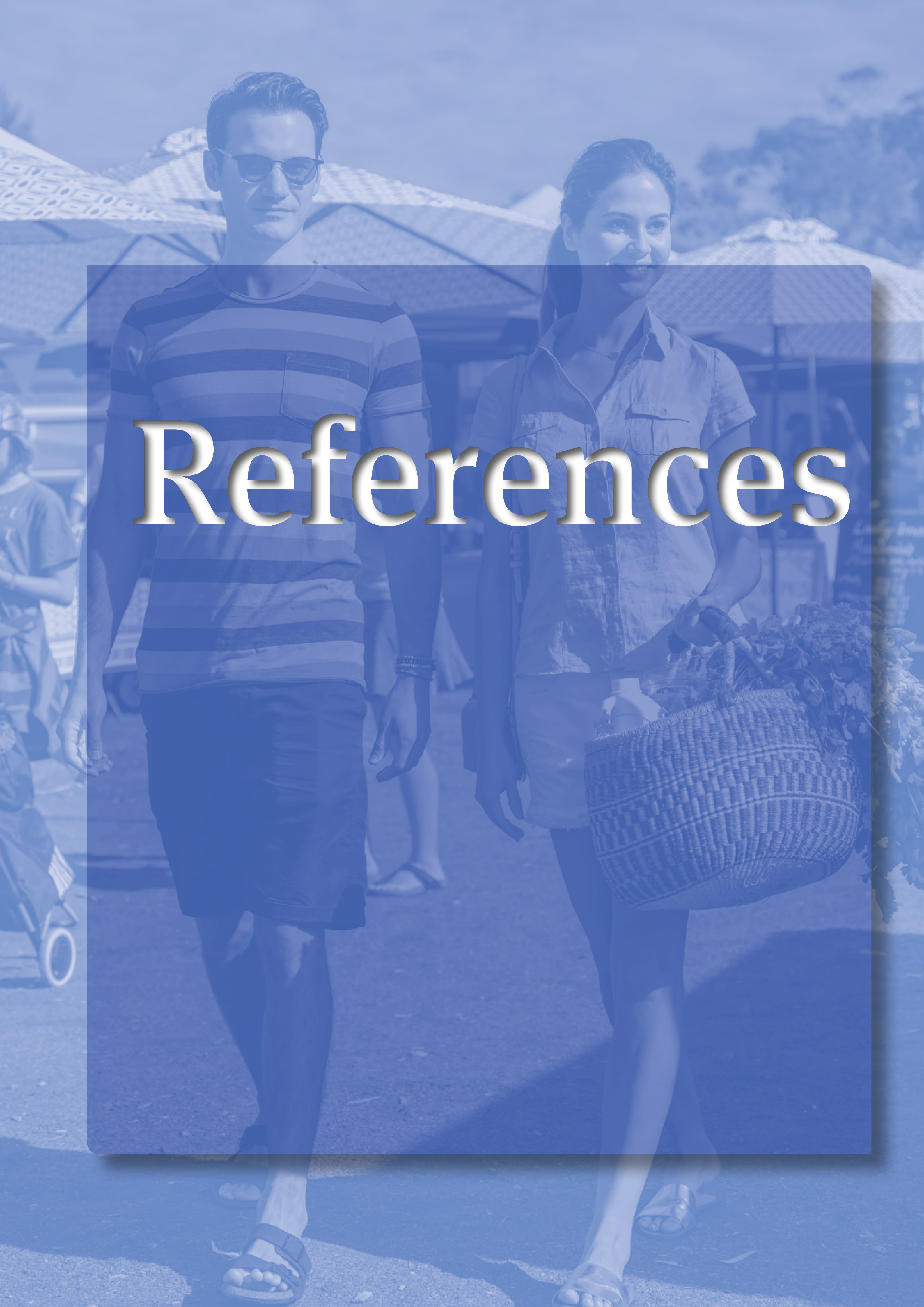

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