Great Southern:
a region in profile 2014
Foreword

Great Southern: a region in profile was prepared by the Department of Regional Development in conjunction with the Great Southern Development Commission to provide a snapshot of the region’s economy.

The Great Southern economy is based on agriculture, in particular wheat, barley, canola, livestock and wool. Tourism is a growing industry within the region with visitors enjoying a mix of history, viticulture and a stunning natural environment.

The Royalties for Regions program is an important State Government initiative that will allocate more than $1 billion for regional projects in 2014-15, including more than $30 million in the Great Southern region. Since it began in 2008, Royalties for Regions has allocated $4.2 billion to more than 3,500 projects across regional Western Australia.

Through programs like Royalties for Regions, the State Government is increasingly investing in infrastructure and services to grow the state, including implementing major economic, social and community development projects that arise from the Regional Investment Blueprints.

This publication contains the latest information available on the economic development conditions of the Great Southern region and is one of a series of nine regional economic summary documents.

I invite you to read Great Southern: a region in profile and trust you will find it interesting and informative.

Hon Terry Redman MLA
Minister for Regional Development
Regional Development Commissions

The State’s nine Regional Development Commissions were established by the Western Australian Parliament following the ratification of the *Regional Development Commissions Act 1993*.

The role of each commission is to:
- maximise job creation and improve career opportunities in the region
- develop and broaden the regional economy
- identify infrastructure services to promote economic and social development of the region
- provide information and advice to promote business development within the region
- seek to ensure that the standard of, and access to, government services in the regions is comparable to the Perth metropolitan area.

For the purposes of achieving that role a commission is expected to:
- promote the region
- facilitate coordination between relevant statutory bodies and State government agencies
- cooperate with representatives of industry and commerce, employer and employee organisations, education and training institutions and other sections of the community within the region
- identify the opportunities for investment in the region and encourage that investment
- identify the infrastructure needs of the region and encourage the provision of that infrastructure in the region
- cooperate with departments of the public service of the State and the Commonwealth and other agencies, instrumentalities and statutory bodies of the State and the Commonwealth in order to promote equitable delivery of services within the region
- cooperate with local governments in order to promote equitable delivery of services within the region.
The Great Southern is located on the southern coast of Western Australia, covering 39,007 square kilometres. The region comprises 11 local government areas with the majority of the population (61 per cent) living in the City of Albany. As the administrative centre of the Great Southern, Albany provides a range of medical, educational, communications and commercial services. The Great Southern has a growing reputation for hosting significant festivals and exhibitions and is renowned for its natural and built tourist attractions. These include a rugged coastline, white sandy beaches, tall timber forests, wildflowers and wineries.

Economic growth in the Great Southern is strong. Primary production is the backbone of the region’s economy and in 2011–12 it was valued at $1.04 billion, making it Western Australia’s second largest agricultural producing region. Continuing growth will bring demand for skilled people to fill positions in the professional, trades and services sectors.

The manufacturing and fabrication sectors are mainly driven by the requirements of agriculture, but are also responding to the needs of the diversifying economy. Retail trade, building and construction, and tourism also make significant contributions to the economy. Quality wine grapes produced in the Great Southern’s five wine sub-regions and the high level of technology available to wine producers have generated employment opportunities and a need for specialist skills.

The Royalties for Regions program has contributed to a significant number of projects within the region. The State Government is committed to assisting Katanning develop the facilities, infrastructure and amenities required to attract and retain residents in the sub-region over the next 10 years through its SuperTown Katanning Growth and Implementation Plan. Other recent projects receiving Royalties for Regions funding include the new Albany Health Campus and the Albany and Mount Barker campuses of the Great Southern Institute of Technology.

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**Value of Industry Activities**

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011-12 Value (mil)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>$1,042</td>
</tr>
<tr>
<td>Retail Turnover</td>
<td>$611</td>
</tr>
<tr>
<td>Tourism (2010-11-12)</td>
<td>$237</td>
</tr>
<tr>
<td>Building Construction (2012-13)</td>
<td>$130</td>
</tr>
<tr>
<td>Woodchip Exports (2013)</td>
<td>$89</td>
</tr>
<tr>
<td>Fishing and Aquaculture (2011-12)</td>
<td>$8</td>
</tr>
<tr>
<td>Mining and Mineral Processing (2012-13)</td>
<td>$7</td>
</tr>
</tbody>
</table>

Source: Department of Regional Development.

Note: Industry activity is an estimation of the gross value of production of key regional industries.
Population

The estimated resident population of the Great Southern was 59,234 in 2013, representing 2.4 per cent of Western Australia’s total population. Of the regional resident population, Albany is home to 36,262 people or 61 per cent of the total.

In the decade to June 2013, the population of the Great Southern increased by 0.9 per cent per year. The local government areas of Albany and Denmark had the highest average annual growth rates of 1.3 per cent and 1.7 per cent respectively. According to the 2011 ABS census approximately 2,600 of the region’s residents are Aboriginal, totalling nearly five per cent of the population.

In 2012, the Western Australian Planning Commission forecasted the population of the Great Southern would continue to steadily rise to approximately 66,000 by 2023. The forecast represents the best estimate of future population size based on fertility, mortality and migration trends.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GREAT SOUTHERN</td>
<td>54,367</td>
<td>59,234</td>
<td>100%</td>
<td>0.9</td>
<td>5%</td>
</tr>
<tr>
<td>Albany (C)</td>
<td>32,020</td>
<td>36,262</td>
<td>61%</td>
<td>1.3</td>
<td>4%</td>
</tr>
<tr>
<td>Broomehill-Tambellup (S)</td>
<td>1,237</td>
<td>1,167</td>
<td>2%</td>
<td>-0.6</td>
<td>16%</td>
</tr>
<tr>
<td>Cranbrook (S)</td>
<td>1,102</td>
<td>1,101</td>
<td>2%</td>
<td>0.0</td>
<td>2%</td>
</tr>
<tr>
<td>Denmark (S)</td>
<td>4,837</td>
<td>5,748</td>
<td>10%</td>
<td>1.7</td>
<td>1%</td>
</tr>
<tr>
<td>Gnowangerup (S)</td>
<td>1,523</td>
<td>1,303</td>
<td>2%</td>
<td>-1.5</td>
<td>12%</td>
</tr>
<tr>
<td>Jerramungup (S)</td>
<td>1,237</td>
<td>1,085</td>
<td>2%</td>
<td>-1.3</td>
<td>2%</td>
</tr>
<tr>
<td>Katanning (S)</td>
<td>4,460</td>
<td>4,407</td>
<td>7%</td>
<td>-0.1</td>
<td>11%</td>
</tr>
<tr>
<td>Kent (S)</td>
<td>629</td>
<td>528</td>
<td>1%</td>
<td>-1.7</td>
<td>0%</td>
</tr>
<tr>
<td>Kojonoop (S)</td>
<td>2,300</td>
<td>2,022</td>
<td>3%</td>
<td>-1.3</td>
<td>6%</td>
</tr>
<tr>
<td>Plantagenet (S)</td>
<td>4,622</td>
<td>5,182</td>
<td>9%</td>
<td>1.2</td>
<td>4%</td>
</tr>
<tr>
<td>Woodanilling (S)</td>
<td>400</td>
<td>429</td>
<td>1%</td>
<td>0.7</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Australian Bureau of Statistics. Note: AAGR = Average Annual Growth Rate.
Labour force

Western Australia experienced a rise in employment levels over the last decade driven by population and industry growth, and international demand for raw materials exports. The Great Southern recorded its highest level of employment at nearly 32,900 persons in 2011-12 and remained strong in 2012-13.

The unemployment rate has fluctuated over the decade to 2012-13, recording a low of 3.6 per cent in 2006-07. Labour market conditions have moderated over the 12 months to 2012-13 with some softening of employment growth and an upward trend in the regional and state unemployment rates.

The 2011 ABS census reported the primary industries of agriculture, forestry and fishing as the region’s major employment industries at 15.4 per cent, declining 3.8 per cent from the 2006 census. Growth in the demand for professionals in health care and social assistance, education and financial services, as well as skilled tradesmen in the manufacturing sector, reflects the region’s response to the needs of a diversifying economy.

### Industry of Employment

<table>
<thead>
<tr>
<th>Industry of Employment</th>
<th>2011</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>15.4%</td>
<td>19.2%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>11.5%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>10.7%</td>
<td>9.3%</td>
</tr>
<tr>
<td>Education and Training</td>
<td>8.7%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Construction</td>
<td>8.5%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>7.1%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>6.6%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>5.7%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>4.0%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Real Estate, Administrative and Support Services</td>
<td>3.8%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Other Services</td>
<td>3.5%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>3.5%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>3.0%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Mining</td>
<td>1.6%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>1.5%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Electricity, Gas, Water and Waste Services</td>
<td>1.1%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Inadequately described/not stated</td>
<td>2.0%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td>0.9%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td>0.6%</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

Tourism

The Great Southern is known for its natural environment including white sandy beaches, rugged coastline, tall timber forests, wildflowers and marine life. According to Tourism Western Australia, the industry attracted an average of 452,500 overnight visitors annually between 2010 and 2012, of which 10 per cent were international tourists. In the same period, tourism expenditure was estimated at $237 million per annum.

The region’s inland towns have developed a range of tourism products around early European settlement and contact history. The proximity to the five internationally recognised wine sub-regions also provides opportunities for further integrated tourism products. The landscape and mountain ranges, including the Porongurup and Stirling ranges, are home to a rich variety of flora and fauna. The region’s most visited attractions include its national parks, the Tree Top Walk near Denmark, Albany’s historic whaling station and the WA Museum at Albany.

The region has a growing reputation as an events based holiday destination with annual flagship events including the Great Southern Festival (the only regional showcase of the Perth International Arts Festival), Taste Great Southern and the Hidden Treasures Bloom Festival.

Albany has a unique significance in the nation’s Anzac story as the departure point for the first and second convoys of the Australian Imperial Force and New Zealand Expeditionary Force (later collectively known as the ANZACS) to fight in World War I. Albany’s connection to the Anzac story will be central to commemorations in 2014-2018 and beyond, through the National Anzac Centre.

Recent regional projects directly supported by the Great Southern Development Commission include the Lake Ewlyamartup Tourism Development, the Munda Biddi Trail extension, and upgrades to the Discovery Bay complex at Frenchman’s Bay. The latter two projects were supported with Royalties for Regions grants.
Mean taxable income

The mean taxable income for the Great Southern region was $57,872 in 2010-11. Over the past 10 years, incomes had an average growth of 6.8 per cent per year. The agricultural areas of Broomehill-Tambellup, Gnowangerup, Jerramungup, Kent and Woodanilling all had higher mean taxable incomes than Albany.

The mean taxable income in the Great Southern was lower than the state average of $73,591, which was boosted by rapid wage increases in resource rich regions. The relatively lower cost of living, however, is a contributing factor to the region being recognised as an attractive place to work and live.

<table>
<thead>
<tr>
<th>Location</th>
<th>Median Weekly Personal Income 2011</th>
<th>Mean Taxable Income 2010-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany (C)</td>
<td>$522</td>
<td>$57,872</td>
</tr>
<tr>
<td>Broomehill - Tambellup (S)</td>
<td>$473</td>
<td>$60,606</td>
</tr>
<tr>
<td>Cranbrook (S)</td>
<td>$485</td>
<td>$55,410</td>
</tr>
<tr>
<td>Denmark (S)</td>
<td>$470</td>
<td>$55,132</td>
</tr>
<tr>
<td>Gnowangerup (S)</td>
<td>$612</td>
<td>$62,325</td>
</tr>
<tr>
<td>Jerramungup (S)</td>
<td>$597</td>
<td>$63,498</td>
</tr>
<tr>
<td>Katanning (S)</td>
<td>$526</td>
<td>$53,218</td>
</tr>
<tr>
<td>Kent (S)</td>
<td>$611</td>
<td>$61,007</td>
</tr>
<tr>
<td>Kojonup (S)</td>
<td>$528</td>
<td>$56,971</td>
</tr>
<tr>
<td>Plantagenet (S)</td>
<td>$470</td>
<td>$55,020</td>
</tr>
<tr>
<td>Woodanilling (S)</td>
<td>$566</td>
<td>$64,698</td>
</tr>
<tr>
<td>Western Australia</td>
<td>$662</td>
<td>$73,591</td>
</tr>
</tbody>
</table>

Agriculture

Agriculture is the largest industry sector by value of production in the Great Southern. There are 2,085 agricultural holdings covering 2.5 million hectares. Agricultural production in the Great Southern was valued at $1.04 billion in 2011-12, representing 14 per cent of Western Australia’s total. Crops accounted for 65 per cent of production, totalling $678 million with grain cereals, such as wheat ($249 million) and barley ($160 million), the top commodities harvested.

Canola, valued at $179 million, is a valuable oilseed product. On an international scale, Australian canola is highly regarded and preferred for its consistent high quality oil content and supplies final markets in Europe, Japan, Pakistan and Bangladesh.

Livestock disposals constituted 20 per cent of the agricultural value at $205 million, predominantly consisting of processed sheep and lambs. Wool ($150 million) and milk and eggs ($10 million) contributed as products generated from livestock.

In 2011-12, the region produced vegetables valued at $2.8 million and fruit valued at $23.8 million.
Fruit is an established product of the Plantagenet and Cranbrook local government areas, and vegetable production in Albany is also significant. More consistent climatic conditions and rainfall patterns in the western coastal parts of the region will support future horticultural expansion.

Viticulture is a mature industry in the region. Approximately 25 per cent of the state’s vineyards are located in the Great Southern, with Frankland River and Mount Barker accounting for the majority of current production. Great Southern wineries are ideally located for cool-climate viticulture and produce distinctive regional wines in a wide range of red and white varieties.

Over the decade to 2011–12 the agriculture industry remained steady in terms of output tonnages, peaking in 2007-08 as a result of a bumper harvest. The value of agriculture has subsequently returned to a level that was the norm earlier in the decade, but innovation and new export markets position the industry for continued success. The total value of agriculture increased by 32 per cent in 2011-12 compared to the previous year.
Fishing and aquaculture

The value of the Great Southern fishing industry increased to $6 million in 2011-12 after remaining steady for a decade. The 38 per cent annual increase from 2010-11 was largely attributed to a greater finfish catch. The 2,759 tonnes brought to market accounted for nearly the entire region's output and had a value of approximately $5 million. The main commercial fishing methods used to target finfish include gill and haul nets. The main fish species caught were pilchard, salmon, herring and shark. Crabs, molluscs and rock lobsters were minor commodities fished off the coast.

Fishing Catch Estimated Value

Source: Department of Fisheries with further estimates by the Department of Regional Development.

Aquaculture

<table>
<thead>
<tr>
<th>Estimated Value ($'000)</th>
<th>2008-09</th>
<th>2009-10</th>
<th>2010-11</th>
<th>2011-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finfish</td>
<td>774</td>
<td>800</td>
<td>1,333</td>
<td>1,776</td>
</tr>
<tr>
<td>Marron</td>
<td>159</td>
<td>145</td>
<td>142</td>
<td>144</td>
</tr>
<tr>
<td>Oysters</td>
<td>408</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Mussels</td>
<td>81</td>
<td>94</td>
<td>68</td>
<td>68</td>
</tr>
<tr>
<td>Yabbies</td>
<td>292</td>
<td>354</td>
<td>156</td>
<td>151</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,715</strong></td>
<td><strong>1,392</strong></td>
<td><strong>1,699</strong></td>
<td><strong>2,140</strong></td>
</tr>
</tbody>
</table>

Aquaculture is a developing industry in the Great Southern and was valued at $2.1 million in 2011-12. The south coast has some of the nation's best abalone aquaculture sites, with deep bays providing consistent water quality and temperature. A land based abalone farm at Bremer Bay generates product for the export market. Albany is home to a premium producer of Sydney rock oysters and blue mussels that has developed local and export sales.
Albany’s woodchip processing and export facilities contribute significantly to the Great Southern’s economy. The region’s bluegum plantation area is estimated to be greater than 130,000 hectares and in 2013 produced 1.1 million tonnes of woodchips for export. According to the Albany Port Authority, woodchips had an estimated value of $89 million. The majority of the output is exported to the fine paper industries in Japan and China.

Additionally, hardwood timber plantings of jarrah, mallee and sheoak have the potential to be developed further for sawmilling, fine furniture, natural resource management and the emerging biofuels industries. In Western Australia, the Forest Products Commission engages in commercial activities in state-owned native forests and plantations to deliver economic and social benefits.
Mining and mineral processing

Western Australia’s resources industry grew significantly over the past decade due to unprecedented overseas demand, which resulted in an increase in mineral production and revenue from $27.9 billion in 2002-03 to $101.8 billion in 2012-13.

Although mining is one of the smaller sectors in the Great Southern’s economy it still makes an important contribution. In 2012-13, the value of mining production was approximately $6.8 million, increasing from $5.7 million in 2011-12. The region has commercial deposits of silica sand, spongolite and lime sand.

Silica sand is mined at Mindijup, north-east of Albany and is used in the manufacture of glass, cement and ceramics. Until recently, spongolite, a silica based abrasive, was mined at Woogenellup, near Mount Barker.

The value of mining to the region has great potential, with a magnetite mining project near Wellstead and a gold mining project near Katanning awaiting investment decisions.

Source: Department of Mines and Petroleum with further estimates by the Department of Regional Development.
Retail turnover

The retail sector is a large employer and an important contributor to the Great Southern’s economy. The industry has shown steady growth and in 2011-12 turnover was estimated at $611 million, an increase of 59 per cent in the period from 2002-03. The retail sector is predominately focused on local demand, albeit with an important proportion catering for tourists and visitors. The sector is expected to grow broadly along with regional population increases.

The City of Albany is the largest population centre, and the major focus of business activity in the region. Chambers of commerce and industry are located in Albany and Denmark.
Building approvals

Building approvals are an indicator of construction activity. Compared to the rest of the nation, construction activity in Western Australia remained robust over the decade to 2012-13.

The total value of building approvals for the Great Southern experienced strong growth from 2002-03 to 2010-11, peaking at $310 million. Approvals declined in the following years however, to $129.8 million in 2012-13 ($99.1 million residential and $30.7 million non-residential).

New building laws and a certified application process introduced in 2012 means the approval process is now more efficient and consistent across the state.

Relatively recent major non-residential building projects within the region include the Albany Health Campus ($170 million), the Albany Entertainment Centre ($70 million) and the Katanning Saleyards ($25 million). The majority of the building activity, approximately 70 per cent, was undertaken in the City of Albany.
Project investment

Over the last decade, Western Australia has had the fastest growing economy in Australia. This outcome was largely attributable to investment in the mining sector’s development and construction phases. The state experienced a tighter investment market in 2013 due to rising production costs, lower commodity prices and a softer economic outlook. The economic value of mining remains positive however, and production will continue to supply domestic and international markets. It is important that the economy transitions to a broader investment profile in order to sustain growth.

Project investment data is divided across three categories: under consideration, committed and under construction. Projects under consideration are those expected to proceed in the near future. Once projects are approved they are committed and, where work has commenced, they are under construction.

Over the decade to 2013, the Great Southern’s estimated investment value fluctuated, inflated by mining related projects under consideration. In 2013 a proposed $2.9 billion magnetite mine east of Albany was suspended due to market uncertainty and high development costs. Projects constructed in the Great Southern include the Albany Entertainment Centre, Albany Health Campus and various energy supply connections to the South West Interconnected System. There is potential for further investment in timber processing facilities and tourism accommodation.
Aboriginal Australians

According to the 2011 ABS census Aboriginal Australians constituted four per cent of the Great Southern population. The sectors with the largest Aboriginal employment participation were agriculture (including forestry and fishing), retail trade, public administration, safety, education and training, health care and social assistance.

The Great Southern Development Commission engages with a range of individual clients, mainstream agencies and community organisations to improve education, training, employment and business opportunities for Aboriginal Australians.

Recent projects supported by the Commission include:

- the Oyster Harbour Fish Traps, a project that involved consultation and detailed planning towards the development of an iconic cultural tourism product
- the Gnowangerup Aboriginal Corporation’s Heritage Centre, a long term project that has attracted more than $750,000 of investment from a range of programs and has provided significant local training opportunities
- provision of information and advice to the Badgebup Aboriginal Corporation Board in its planning towards the development of a youth engagement and training facility in the Shire of Katanning
- governance training aimed at providing a targeted program to increase the financial skills and management capacity of Aboriginal community leaders in the region
- preliminary planning and evaluation of culture and heritage based tourism products across the region.
The Great Southern has well-developed infrastructure.

The region is serviced by the Water Corporation, which provides water supply, wastewater and drainage. Potable water is reticulated to towns across the region and to some rural properties.

Electricity is provided to the Great Southern from Western Power’s South West Interconnected System. Wind farms are also operational in Albany (35MW), Denmark (1.6MW), Mt Barker (800kW) and Bremer Bay (660kW). In Albany LPG is reticulated to domestic customers.

The road network consists of sealed highways and main roads, and a mix of sealed and unsealed minor roads. The journey from Albany to Perth by car takes just over four hours. A daily passenger bus service operates from Albany to Bunbury (in the South West region) and to Perth. There are also rail freight services in the region, mainly providing transportation for bulk commodities such as grain and woodchips. A range of freight, into and out of the region, is also transported by road.

The Albany Regional Airport is capable of handling Boeing 737-sized aircraft. There are regular flights to and from Perth, some via Busselton in the South West. Charter and private aircraft, as well as agricultural contractors, use Albany airport along with airstrips at Denmark and Gnowangerup.

There are unsealed airstrips at Cranbrook, Jerramungup, Bremer Bay, Kojonup and Katanning.

The Port of Albany is located in one of the best natural harbours in the southern hemisphere. Major exports through the port include grain, woodchips and silica sand.

The region has a complete range of voice and data telecommunication products and services. Work on the National Broadband Network began in 2013 and mobile telephone coverage is available in most parts of the region. Video-conferencing is available in Albany and Denmark and through the Community Resource Centre Network.

Comprehensive education services are available with a number of public and private pre-schools, primary schools and senior high schools across the region. An agricultural college is located at Denmark. Tertiary and postgraduate education opportunities are also available at the University of Western Australia Albany campus.

An extensive range of medical, dental, mental and aged health services are provided throughout the region. The new $170 million Albany Health Campus opened in 2013.
Living in the Great Southern

*Living in the Regions 2013* was a large-scale social research project conducted by the Department of Regional Development. The purpose of the survey was to ascertain what attracts people to the regions, understand the barriers to living in the regions, measure the quality of life in regional Western Australia, and most importantly, use that information to inform and direct regional development initiatives into the future. The survey received more than 10,000 responses.

Respondents were asked to rate attitudes and participation according to nine categories, with a score of 10 representing the most positive and a score of one the least positive. Results confirmed the regions have a lot to offer local residents. The most positively rated aspects of regional life were safety and lifestyle, general well-being and happiness.

Specifically:
- the Great Southern was regarded as a great place to live and raise a family. It was rated as a safe region to raise children and one of the best serviced by child care options
- residents rated their region as a friendly and connected community. It was characterised by the quality of lifestyle, the cleanliness of its environment and its relatively low cost of living
- the Great Southern was rated by Perth residents as a destination of choice for a potential move.

Living in the Regions 2013 will assist government, the private sector and community partners to direct their efforts and investments on matters relevant to people living in regional Western Australia. A copy of *Living in the Regions 2013 State Report* is available for download at www.drd.wa.gov.au. In 2014, a *Living in the Regions: Great Southern Report* detailing all data from the survey will be available.

![Aspects of Regional Life](chart.png)

**Aspects of Regional Life**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety</td>
<td>8.27</td>
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<td>Health &amp; General Well-being</td>
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<tr>
<td>Sense of Community</td>
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<td>Connectedness</td>
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<td>Employment Prospects</td>
<td>6.39</td>
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<tr>
<td>Education &amp; Training</td>
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Invest in the Great Southern region

Tourism
Tourism is a key focus for economic growth in the Great Southern, with a vibrant industry based around assets of scenery, unique forests and cultural heritage.

The upgraded Albany waterfront includes the $70 million Albany Entertainment Centre, an attractive promenade and a public marina and jetty. Opportunities are available in the precinct for a hotel, short stay accommodation, restaurants, shops and cafes.

There are many walking, riding and driving trails throughout the Great Southern that provide a uniquely Western Australian coastal and bush experience. Trail related development opportunities exist for accommodation, food and service providers.

Walking and driving trails include:
- the Bibbulmun Track, one of the world’s great long distant walk trails, which stretches from Perth to Albany
- the Munda Biddi Trail, a 1,000km off-road cycling trail, which starts near Perth and passes through the state’s south west before terminating at Albany
- the Kinjarling Trail, a planned development that will link Noongar and European history and heritage sites along Albany’s waterways
- the Hidden Treasures Drive Trail, which offers a unique glimpse of the region’s farming communities and settler heritage
- food and wine drive trails highlighting the region’s quality produce.

The potential for nature-based tourism ventures on the region’s south coast is being developed and there are a growing number of sensitively designed products in accommodation, adventure, tours and education.

Agriculture and agricultural processing
High rainfall in winter and warm summers make the Great Southern ideal for agricultural production. With a reputation as a premium wine producing area, the region also grows a range of broad acre crops including wheat, barley, oats and canola.

Low-cost access to Albany’s deepwater port and the capacity to rotate a diverse range of crops are factors that have made the region a very successful exporter of high quality produce.

Investment opportunities include the production and processing of:
- grain for flour, premixes, noodles, pasta and stock feed. The region has excellent grain storage and handling systems. The Department of Agriculture and Food operates a grain breeding and testing program to produce grain to buyers’ requirements
- pigs for exports of fresh pork. The region provides strategic access to Asian markets, a reliable supply of grain for feed and competitive production costs
dairy, where there is potential for expansion based on the region’s reliable rainfall and access to rapidly expanding final markets for dairy products in Asia

• horticulture, for which the competitive investment advantages include counter-season production to the northern hemisphere and an established reputation for safe, high quality products.

**Aquaculture**
The waters along the south coast are ideal for commercial aquaculture that could meet the growing demand for high quality seafood in Asian markets and beyond. There are also opportunities for deep cage fin fish aquaculture.

**Mining, manufacturing and timber processing**
A magnetite iron ore mine is proposed east of Albany, which could lead to further development in this identified mineralised zone. The mine, which is subject to a final investment decision, will result in the Albany Port being upgraded to handle the new commodity. There is also a proposal for a gold mining project near Katanning.

The region has two industrial estates to accommodate industry associated with manufacturing, fabrication and the processing of the region’s resources. Mirambeena Industrial Estate, located 15km north of Albany, and Yerriminup Industrial Estate, 7km south of Mt Barker, are both protected by controlled-use zoning and are well-positioned on key transport links.

The Great Southern also provides a strategic location for investment in value adding to the region’s significant eucalypt plantation resource. The Mirambeena Timber Processing Precinct near Albany was specifically established for this purpose and provides access to appropriate infrastructure. The precinct is currently home to a woodchip facility.

Other manufacturing opportunities in the Great Southern include:

- processing facilities for a range of foods and fibre to supply both domestic and export markets
- specialty or boutique beer brewing based on the region’s comparative advantage as an established producer of malting barley.

**Renewable energy**
The Great Southern is well placed for investors seeking to capitalise on the region’s biomass, wave and wind energy resources.

Potential renewable energy opportunities include:

- using biofuel, such as plantation timber harvest residue, for electricity generation
- increasing wind farm capability
- wave energy as a source of baseload power generation.
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All photos are courtesy of the Great Southern Development Commission.

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