



THE UNIVERSITY OF  
**WESTERN  
AUSTRALIA**

Committee for



# FACTBase

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## **Agritourism in Western Australia: better than going abroad post-COVID**

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## Summary of Key Findings

- Agritourism provides a critical means for introducing money into the Western Australian economy as COVID-19 restrictions are eased.
- Western Australian industries have a 'first-mover' advantage, given the State's low infection and community transmission rates, and quick reopening of the economy.
- Agritourism is associated with industry sectors that have some of the highest multiplier effects in the Australian economy.
- Agritourism is based on an exchange of experiences which can help educate both agritourism providers and visitors, and connect rural and regional economies to communities across the state, nation and abroad.
- Better understanding of these experiences, will allow agritourism providers and authorities to develop and promote regional brands to increase both domestic and international sales.

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## Introduction

Whilst the possibility of a global pandemic has long been discussed (Allen et al., 2017; Gates, 2015; Jones et al., 2008), the emergence of COVID-19 in 2020 has changed the world in ways that we have yet to understand. Simply put, it has demonstrated the global scale at which we are all connected. It has also raised awareness of the vulnerabilities and challenges faced by our local and regional communities. For the most part, Perth has avoided a high number of community-transmitted COVID-19 cases and subsequent deaths through strict social distancing measures and restrictions on travel. Although the last few months have seen significant job and economic losses, the full extent of the economic damage is yet to be felt, as Federal stimulus packages continue to support the economy through the largest economic shutdown in recent Australian history. As we emerge from these strict social distancing measures, the question remains: **How will we recover economically?**

Drawing on Keynesian wisdom from past economic downturns, we can see that we *need to spend*—austerity will only cause further economic contraction (Furman, 2008; Gittins, 2020; Lawson, 2020). Given that the majority of the Western Australian (WA) economy and population is centred in Perth, economic recovery lies in spending by Perth residents—both within Perth and around the State—as the flow of money represents job support and creation. Indeed, the economic wealth of Perth has long been entwined with WA's regions, and is fundamentally tied to its material, energy and agricultural wealth (Tonts et al., 2013).

Therefore, a FACTBase devoted to understanding how spending in agritourism might aid Perth's

recovery by boosting jobs, health and well-being after months of social distancing is timely. In the context of continued restrictions on domestic and international travel, and a sharpened interest in local products and healthy living, Perth's residents will be keen to reconnect with the rest of the State in a way that aligns with their values regarding food, family, and community. Interestingly, COVID has provided opportunities for us to reevaluate what is important in our lives, and it seems unlikely that we will revert quickly back to our pre-COVID working lifestyles.

This FACTBase draws on a comprehensive report of Southwest WA agritourism businesses recently released by the CRC for Honey Bee Products with funding support from the Department of Primary Industry and Regional Development (DPIRD; see Holliday et al., 2020). Agritourism is defined by the report as *'an activity that can supplement agricultural production where tourists are guests participating in educational and interactive experiences which promote farm produce and regional lifestyles'* (Holliday et al., 2020, p.13). Agritourism is a critical industry sector capable of providing stimulus to a range of WA businesses, particularly in the regions. Further, tourism has been one of the industries hardest hit by the pandemic, and has been identified by the WA Premier as a key sector to stimulate economic recovery (Laschon, 2020).

In discussing the economic benefits of agritourism, this FACTBase first reviews the economic multipliers associated with the agritourism sector. Then, it provides an overview of the distribution of agritourism businesses—separating the well-organised wine industry from other agritourism providers. After that, it discusses the layers

of experience identified within a recent agritourism report (Holliday et al., 2020), including the benefits of agritourism to both providers and visitors and the branding of Western Australia's unique places in the national and international tourism markets. Lastly, it concludes with policy recommendations, with particular reference to the current crisis in the context of WA's low COVID transmission rate and as it emerges from strict social distancing.

## Agritourism as an industry recovery engine

Economic multipliers provide a means to examine how various industries contribute to the economy as a whole, being defined as the injection of spending which leads to new income or jobs. They are a proportional measure of how much an economy changes internally as the result of an external stimulus. One way of measuring multipliers is to use national input-output tables, which provide an overview of how outputs from one industry are used by other industries. Input-output tables represent the interdependencies between different sectors of an economy or region, and multipliers calculated using national input-output tables provide insight into how a change in the outputs from one sector impacts all other sectors in a national economy. This change is the *multiplier effect*. More simply, the economic multiplier is the degree to which \$1 million spent in the tourism industry, for example, injects money across all industries in the economy to create jobs or generate income. In the case of an employment multiplier, injecting \$1 million into the tourism industry will generate 'X' number of jobs across the economy as a whole. This job creation can occur anywhere in

the economy—not just the region where the initial spending occurs.

To understand multiplier effects in the context of monies spent in the agritourism sector, we used Australian Bureau of Statistics (ABS, 2018) input-output tables calculated from Australian National Accounts data. The multiplier effects for the various industry sectors of the Australian economy are given in Table 1, with those most directly related to the agritourism sector highlighted in grey. We must keep in mind that these are national multipliers, and that multiplier effects may differ slightly between regions. However, given the complexity of an economy, it is impossible to calculate regional multipliers. From Table 1, we see that the injection of \$1 million into the Agriculture, Forestry and Fishing industry will generate almost three additional jobs in other sectors (with a multiplier of 2.95), whereas injecting \$1 million in Manufacturing will create around two jobs (or 2.03 jobs) in other sectors. These two industries are closely related to agritourism, as Manufacturing includes the value-add to agricultural products from the Agriculture, Forestry and Fishing sector.

Over the last decade, there has been an increase in WA's specialised food, wine and beer manufacturing industries, many of which are linked to food manufacturing and distribution companies in Perth. Therefore, we can expect that increased demand for these products will create an income and employment multiplier effect in the region where the product was bought, as well as in Perth.

**Table 1: Industry employment multipliers based on ABS Input-Output tables, 2015-16\***

Industry of Employment	Multiplier
Agriculture, Forestry and Fishing	2.95
Mining	0.98
Manufacturing	2.03
Electricity, Gas, Water and Waste Services	1.14
Construction	2.14
Wholesale Trade	2.32
Retail Trade	8.54
Accommodation and Food Services	8.88
Transport, Postal and Warehousing	2.85
Information Media and Telecommunications	1.79
Financial and Insurance Services	1.67
Rental, Hiring and Real Estate Services	0.63
Professional, Scientific and Technical Services	3.61
Administrative and Support Services	4.06
Public Administration and Safety	5.04
Education and Training	7.99
Health Care and Social Assistance	8.33
Arts and Recreation Services	4.85
Other Services	6.92

Source: Adapted from ABS (2018)

\*Highlighted rows are those directly related to agritourism.

Referring again to Table 1, we see that injecting \$1 million into the Retail Trade and the Accommodation and Food Services industries will respectively generate an employment multiplier effect of 8.54 and 8.88 across the economy. Agritourism spans both of these sectors: increasingly, WA agricultural producers are providing retail and/or accommodation as a means of supplementing their core business. The rise in social media platforms such as AirBnB have facilitated this, with a diversity of accommodation options now found on farm properties across WA. Further, Table 1 shows money spent in the Arts and Recreation Services sector has an almost five-fold multiplier effect (4.85 jobs created with an injection of \$1 million). This sector provides important support to agritourism, given the increasing

degree to which visitors to WA's agricultural regions are engaging in diverse local experiences and education.

When considering the multiplier effect of an industry sector, it is important to bear in mind that job creation does not occur only in the region(s) where the money is spent. In WA, given that the majority of businesses are based in Perth, agritourism spending in regional WA has a flow-on effect to Perth businesses, including a diverse range of Perth-based logistics, construction, real estate and manufacturing businesses that service regional WA.



## Type and location of agritourism in WA's Southwest

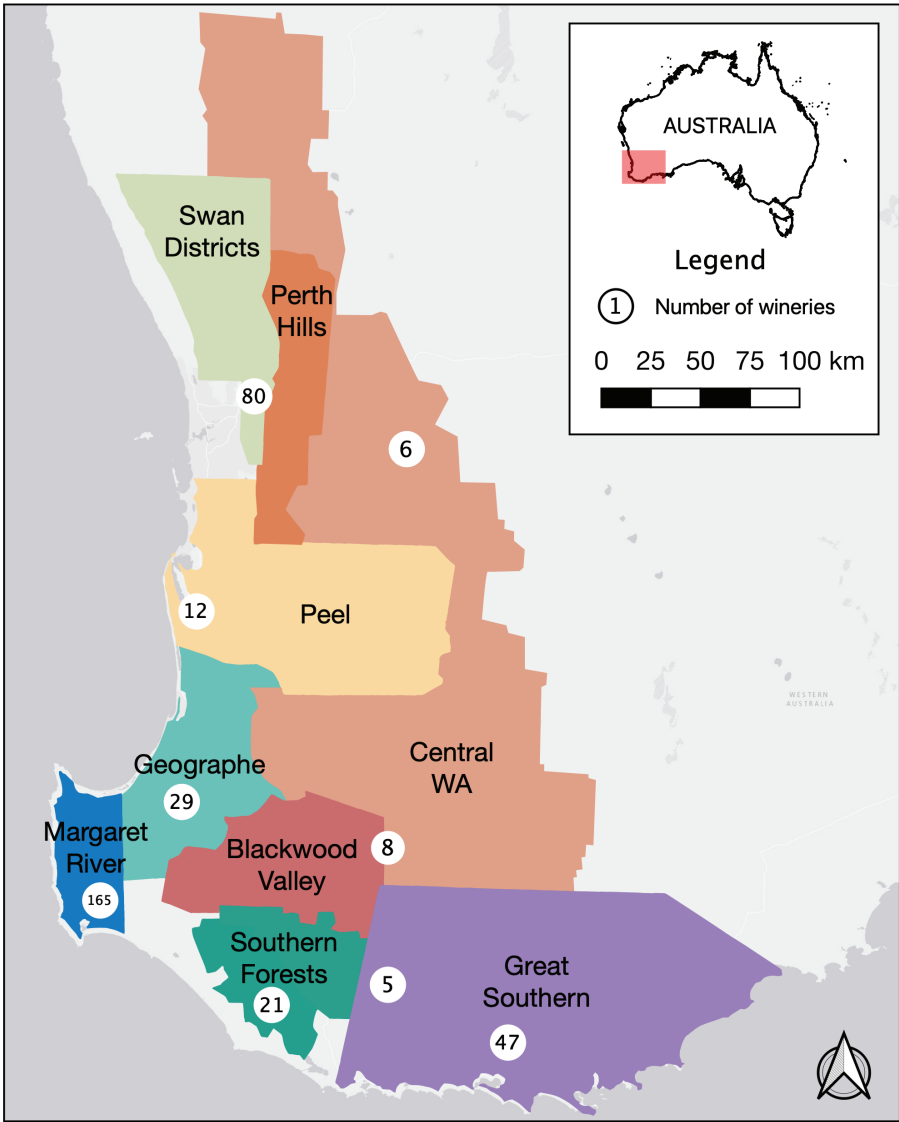
Although the majority of WA's population and subsequent spending power is centred in Perth, most agritourism businesses are found in Western Australian's Southwest and Wheatbelt regions. The most well-known and organised of these is the wine industry, with nine distinct regions found in the State [as identified by Scoop (Wines of WA, 2019)]. These are shown in Figure 1, along with the number of wineries found in each. Three of these regions are directly adjacent to the Perth metropolitan region

(Swan Valley, Perth Hills and Peel), with the other areas extending south and east through regional WA. The majority of these wineries are concentrated in the Southwest's Margaret River region (165 wineries).

Western Australia's wine history extends back to its colonial beginnings, with the first vineyards planted in 1829. It has risen to global success within the context of the pioneering Australian wine industry, which broke tradition through the application of

research-led innovations (Giuliani et al., 2011). Western Australia's wine regions have become favourite tourist destinations within the State. Over the last several decades, wineries have evolved into well-established agritourism businesses offering a range of additional experiences including cellar door tastings, accommodation, restaurants, and retail outlets for wines and other locally made products. Wines from throughout WA can now be found in retail outlets across Perth, the nation and the globe.

**Figure 1: Western Australian wine regions with numbers of wineries**



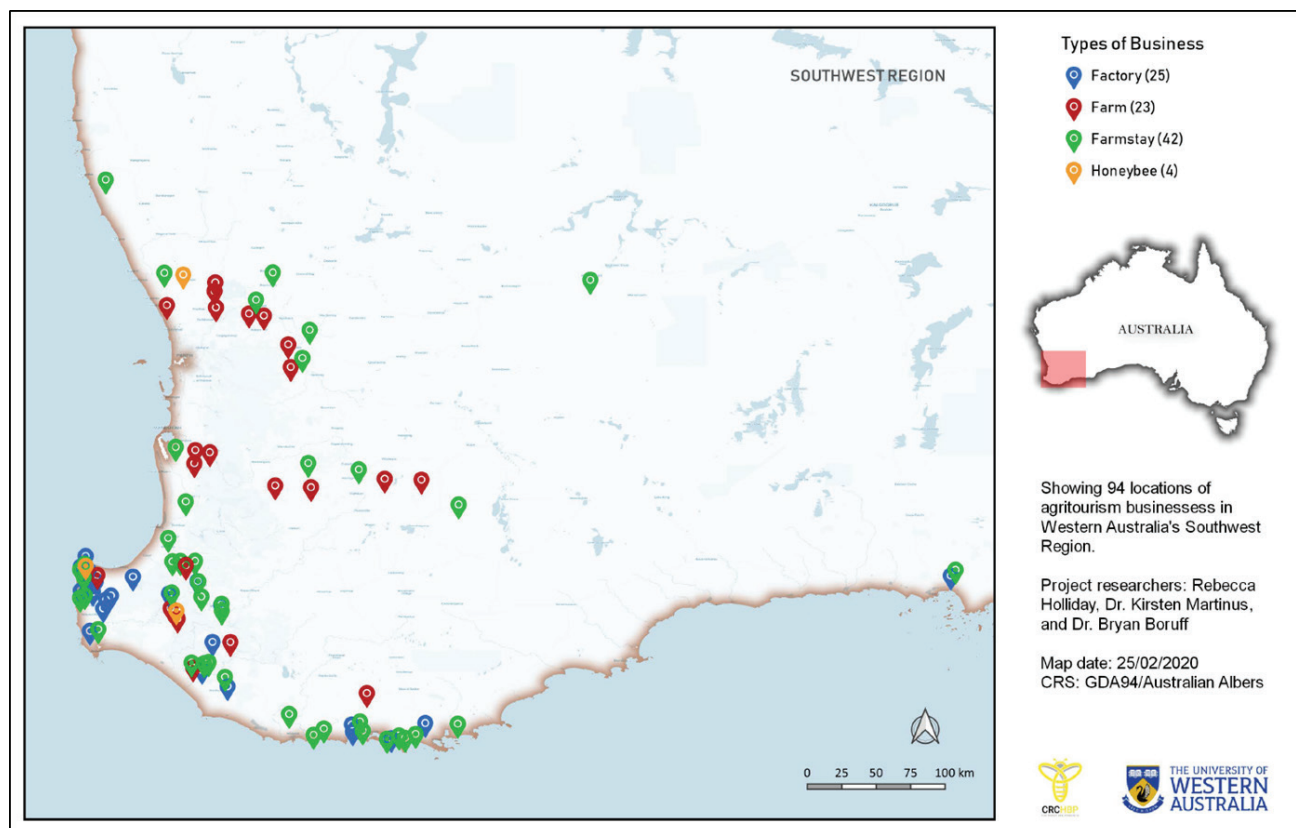
Source: Adapted from Wines of WA (2019)

Whilst wineries are popular tourist destinations, often obscured is the wide range of alternative agritourism offerings. For this reason, a recent study examining agritourism in WA's Southwest (Holliday et al., 2019) emphasised products and offerings outside of the wine industry. Figure 2 illustrates the range and location of agritourism businesses identified in the report

as part of a comprehensive internet scan. The agritourism businesses found ranged from the well-known farmstay to more bespoke offerings such as food or beverage production tours, educational events and full immersion experiences. Clusters of agritourism businesses were identified around the Perth Metropolitan region and Perth Hills, Bunbury and east through

Collie, between Dunsborough and Augusta, south of Bunbury through Bridgetown and Pemberton, throughout the Great Southern and as far east as Esperance. The report highlights not only the geographic diversity of the State's agritourism offerings but also opportunities to further develop the industry and enhance regional economies.

**Figure 2: Location of agritourism businesses found in WA Southwest, excluding wineries**



Reprinted with permission. Source: Holliday et al. (2019)



## Experiencing WA's Southwest: who benefits?

One key aspect in the success of agritourism appears to be the experience provided to the visitor, not just the product itself. Five different types of experiences were identified in the report (Holliday et al., 2020), as shown by the experience layers illustrated in Table 2. Each experience layer can be further divided into different components (or segments), highlighting the diverse ways by which visitors can engage in an authentic agricultural experience. It is expected that

most agritourism interactions engage visitors to some degree across all experience types; it is further expected that each visitor-provider interaction provides a means to enrich both agritourism and the regional experience as a whole. In this way, agritourism provides a platform to educate visitors about rural lifestyles and work, as well as to provide a conduit from regional WA to visitor source communities. Such source communities might include those in the Perth Metropolitan region, as well as the international course

communities of visitors from overseas ports such as Singapore, China, and the U.K. Working together, agritourism providers can enhance regional economies through collective branding of agritourism experiences and local offerings. This will benefit all businesses in the region, with the outcome being a well-organised regional product offering (experience or good) that can be sold both nationally and internationally, such as the case of Western Australian wines.

**Table 2: Agritourism experience layers and segments, with the number of offerings by businesses in WA's Southwest, 2019**

Experience Layer	Layer Description	Experience Layer Segments	n	% <sup>1</sup>
<b>Learning</b>	The nature of the educational experience provided and how it is delivered  <i>What will I learn and how?</i>	Formal presentation (lecture style)	2	2
		Instructional (interactive) – One-off session	60	64
		Instructional (interactive) – Program of study	7	7
		Self-guided learning (signposted/AR informative tours)	0	0
		Not applicable	28	30
<b>Interaction</b>	How visitors are involved in the experience  <i>What type of involvement and engagement will be required?</i>	Full immersion(a day in the life)	4	4
		Practical/physical tasks (pick strawberries/feed animals/soap making)	71	76
		Observation of tasks	15	16
		Self-guided involvement (bush walking or bike riding on farm)	74	79
		Not applicable (no coordinated activities)	11	12
<b>Authenticity</b>	Will visitor experiences reflect actual agricultural activities carried out on the property?  <i>How is the experience staged?</i>	Actual working farm activities	10	11
		Staged working farm activities	57	61
		Sales or non-farm activities	56	60
		Not applicable	5	5
<b>Location</b>	Location of experience/activities  <i>Where is the experience?</i>	On-farm	92	98
		Off-farm	13	14
		In-situ (on-farm activities that are separate from agricultural operations)	2	2
		Not applicable	0	0
<b>Length of Stay</b>	Availability of on-site accommodation  <i>How long can I stay?</i>	Overnight or extended visits	54	57
		Day visit	61	65

Reprinted with permission. Source: Holliday et al. (2019)

<sup>1</sup> Percentages may not total 100% in each experience layer, as businesses could respond across several segments in the same layer.



The agritourism report referenced here used these experience layers to develop a business survey to further understand agritourism offerings across WA's Southwest, and to gain a better understanding of the importance of the agritourism 'experience'. The business survey was administered online to agritourism providers across WA's Southwest. Table 2 details the number and proportion of businesses providing different types of experiences. The results highlight that the most popular visitor experiences are those that are interactive and provide one-off learning sessions, have either a practical way of engaging with visitors or are self-guided, and are on-farm. In terms of the 'authenticity' of the experience,

staged farm or in-store retail (non-farm) experiences were both common. With regard to the length of visitor stay at a specific agritourism experience, slightly more tourists visit businesses for the day rather than for an over-night stay.

Individual interviews with agritourism providers revealed that businesses and local communities have as much to gain from visitors as visitors do from agritourism in WA. Mutual benefits can be expressed as shared outcomes including personal development and growth, and an enhanced connection between communities within and outside WA (Figure 3). These connections allow agritourism providers

the opportunity to maintain a regional lifestyle, while providing visitors with a chance to (re) connect with nature. Shared outcomes are further enhanced through shared stories and experiences strengthening the understandings of different cultures, both at home and abroad, and building awareness of alternative lifestyles. Indeed, storytelling appeared critical in generating a regional brand beyond the individual producer engaged in agritourism. The report found it deepened the feeling of immersion in the agritourism experience, as well as human attachments—both between the provider and visitor, and in the visitor regarding the region.

**Figure 3: Shared outcomes produced through producer and visitor agritourism experiences**

Examples of producer experiences	Shared outcomes	Examples of visitor experiences
<ul style="list-style-type: none"> <li>• Sharing of stories and produce or product</li> <li>• Connectedness to land and region</li> <li>• Enhancing and maintaining regional lifestyles</li> </ul>	<ul style="list-style-type: none"> <li>• Global and local connected community</li> <li>• Personal development and growth</li> <li>• Understanding of alternative lifestyles</li> <li>• Connection to healthy food and local-grown produce</li> <li>• Regional sustainability</li> </ul>	<ul style="list-style-type: none"> <li>• Sharing stories</li> <li>• Appreciation of regional lifestyles and challenges</li> <li>• Exposure to fresh healthy food and ways of living</li> <li>• Awareness of alternative lifestyles</li> <li>• Sense of self and connection to nature</li> </ul>

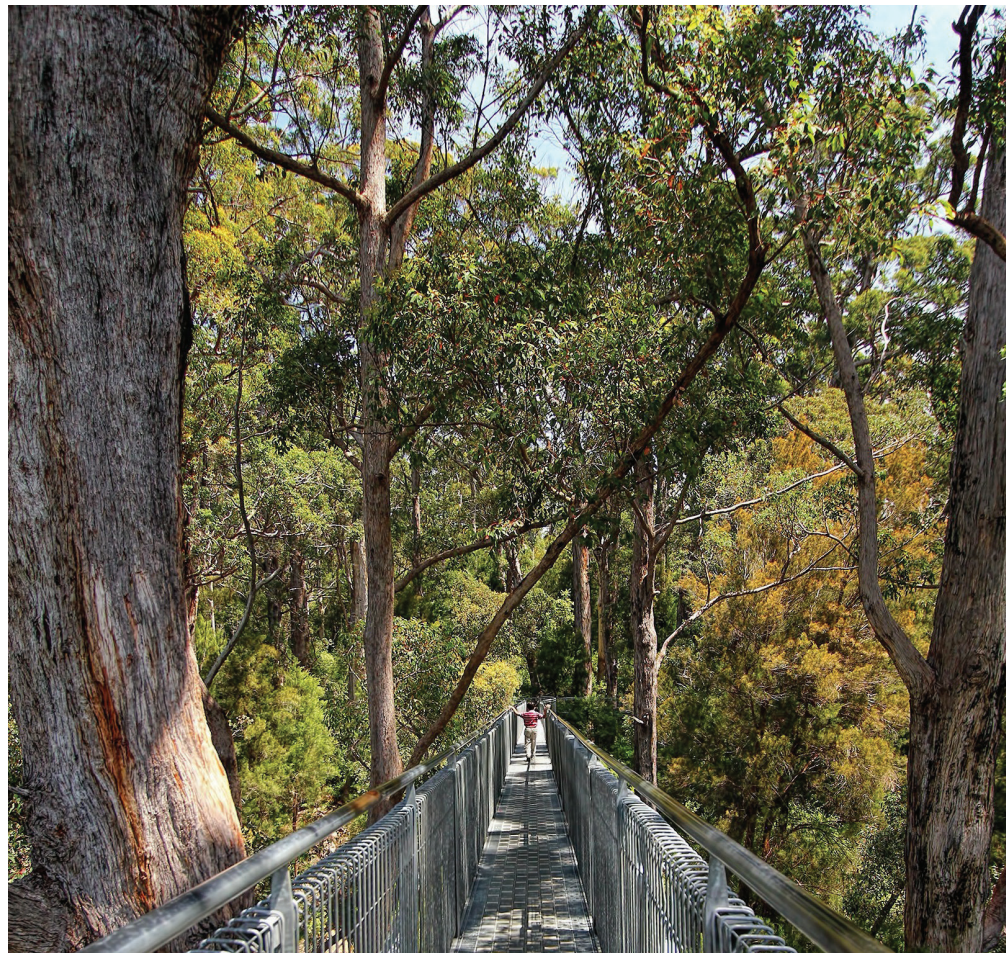
Source: Adapted from Holliday et al. (2019)



## Conclusions: policy implications

This FACTBase discusses agritourism as a mechanism for supporting economic and social objectives and re-connecting the State post-COVID-19. Indeed, COVID-19 has provided an interesting community experiment in which quarantine and lock-down measures have increased our time spent with family, and enhanced our focus on local nature-, health- and active lifestyle-focused activities (e.g., physical exercise, gardening). And, whilst many have continued to work and be productive, predictions warn of an impending economic downturn of a magnitude that Australia has not seen in decades. It is therefore of critical importance that we consider how to soften the impacts of further economic hardships. We argue that this is best done by spending locally within Western Australia, and have demonstrated this by highlighting the benefits of the agritourism sector and its multipliers into other industry sectors. Further, many of the industries possessing the highest multiplier effects are those to which agritourism is most directly linked. That is, these industries have potential to create more jobs per dollar spent than many other industries in our economy—including mining, which, interestingly, has one of the *lowest* multiplier effects.

The agritourism report on which this FACTBase draws emphasised the importance of diversity in providing for the visitor 'experience'. While the wine regions of Western Australia are well-organised, greater support and development of alternative WA agritourism offerings would provide opportunities for further economic growth. There is a critical role for government to foster new regional businesses whilst supporting and marketing existing industries. For example, through the creation of topical



tourist trails, regional businesses could be marketed together, increasing local attractiveness. The report also noted the importance of storytelling in creating a regional brand whereby stories told by the agritourism provider intensify the experience and deepen visitor understandings. The immersive capabilities of storytelling create a connection between providers and visitors, and between visitors and the region. This means that when visitors return home, they become the storytellers – promoting not only the provider, but the region. Finally, the development of a certification system would enable consumers to choose 'experiences' that have been endorsed by an accreditation process and showcased through a targeted web portal of agritourism providers. This would

allow visitors a point of entry into WA agritourism and facilitate access to some of the State's best kept secrets.

Western Australia has a unique first-mover advantage in many industries, given the relatively short time frame in which it has successfully reduced its COVID-19 case numbers. In the case of agritourism, this has meant Perth residents are now able to travel to regional destinations for holiday. Reopening WA's agritourism businesses in a relatively COVID-safe environment provides a competitive advantage as visitors begin to move freely about the nation (and the globe). Supporting and developing agritourism provides a base from which we can attract visitors back to Perth and Western Australia, and, in so doing, provide critical support for local business.

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## Appendix 1: List of agritourism businesses in figure 1

Location ID	Map	Business Type and Name	Location ID	Map	Business Type and Name
1	H	Balingup Lavender Farm	49	F	A Sunshine Farmstay and Jajelup Cottage
2	E	Bannister Downs Dairy	50	J	Airyhemming Farmstay
3	C	Barnyard1978	51	H	Balingup Heights Hilltop Forest Cottages
4	F	Bartholomews Meadery	52	F	Billa Billa Farm Cottages
5	C	Beer Farm	53	G	Blue Sky Retreat
6	F	Bushfood Factory & Nursery & Tennessee Hill Chalets	54	I	Boronia Farm
7	G	Cambray Cheese	55	A	Boshack Outback
8	F	Denmark Animal Farm & Pentland Alpaca Stud	56	D	Burnside Organic Farm
9	C	Eaglebay Olives	57	G	Cambray Cottages
10	D	Horses and Horsemen	58	F	Cinnamon Coloureds - McLeod & Shadforth - Denmark
11	SW Region	Jersey Farm	59	F	Cosy Corner Chalets
12	D	Jesters Flat	60	SW Region	Eden Valley Farmstay
13	G	Levanda Grove	61	C	Four Elements Farm Stay
14	C, D	Millers Icecream	62	SW Region	Gelfro Home Hosted Farmstay
15	F	Mt Romance Sandalwood Factory	63	F	Gilgy Getaway and Organic Farm
16	E	Old Vasse Trout and Marron Farm	64	I	Happy Valley Homestead
17	C	Olio Bello	65	B	Ibis Park Farmstay
18	C	Petra Olive Oil Estate	66	E	Karri Hill Cortages (or) Watermark Kilns
19	C	Providore Margaret River	67	SW Region	Lavendale Farmstay and Cottages
20	D	The Berry Farm	68	A	Limes Orchard & Farm Stay
21	SW Region	Truffle and wine Co	69	G	Lucieville Farm Chalets
22	C	Vasse Virgin	70	SW Region	Mary's Farm Cottages
23	D	Whirlwind Olives	71	F	Misrty Valley Country Cottages
24	C	Wulura Farm	72	SW Region	Nambung Station Stay
25	J	Yirri Grove	73	SW Region	Nulla Nulla Farm Retreat
26	F	Amuri Creek Fruit	74	F	Nutkin Lodge
27	SW Region	Australian Truffle Traders	75	E	Pemberton Farm Chalets
28	G	Chestnut Brae Farm	76	C	Petra Olive Oil Estate Luxury Farmstay Accommodation
29	A	Christan Farm	77	E	Pump Hill Farm Cottages
30	A	Free Range Emu Farm	78	SW Region	Quellington School House Farmstay
31	A	Golden Grove Citrus Orchard	79	SW Region	Roswa Park Farmstay
32	A	Jumanga Olives	80	D	Rushy Creek Farm
33	I	Karintha Orchards	81	I	Spearwood Valley Farm
34	B	Langfordhill Riding Farm	82	D	Sunflowers Animal Farm
35	SW Region	Linda Valley Farm	83	G	Sunnyhurst Chalets
36	E	Mardofarm and Farrell's Organics	84	I	The Dell
37	G	Merri Bee Organic Farm	85	F	Tree Elle Retreat
38	B	Orondo	86	E	Whispering Woods
39	SW Region	Parnells Nursery	87	F	White Dog Lane Cottage Farm Stay
40	SW Region	Pet Teet Park	88	F	Willow Creek Farm Cottage
41	I	Spring Valley Orchard	89	A	Willowbrook Farm
42	SW Region	Springhills Farmstay	90	C	Wyadup Brook Cottages
43	A	The Worm Shed	91	G	Nannup Brook Farm - Southern Forests Honey
44	A	Tree Change Alpacas	92	C	Pure & Local
45	B	Westcoast Cattle Ranch	93	G	Southern Forests Honey
46	SW Region	Williams River Produce/ Williams River Farm Stay	94	A	West Coast Honey
47	C	Yelverton Protea Farm			
48	SW Region	York Olive Oil Co.			

## About FACTBase

FACTBase is a collaborative research project between the Committee for Perth and The University of Western Australia. It aims to benchmark the liveability of Perth and its global connectedness through an examination of Perth's economic, social, demographic and political character.

The FACTBase team of academics and researchers condense a plethora of existing information and databases on the major themes, map what is happening in Perth in pictures as well as words, and examine how Perth compares with, and connects to, other cities around the world.

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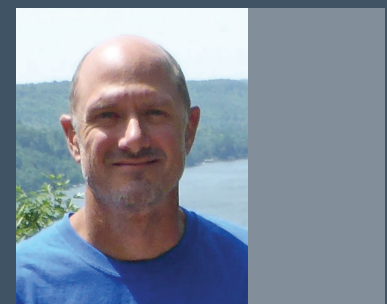
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