

3 South West Overview

Regional economic snapshot

In 2025, the South West Region's Gross Regional Product exceeded \$18.6bn, accounting for 4% of WA's Gross State Product (ABS National Accounts). An average annual estimated GRP growth rate of 2.5% was recorded in the years 2016-2025, with negative growth reported in 2020 and 2025.

The South West has a broad economic base with manufacturing, construction, mining, agriculture, tourism and timber processing key elements. There is a strong business and retail sector with an estimated 17,607 businesses in the South West. The main contributors to economic output in the region are Manufacturing (23.3%), Mining (16%) and Construction (14.8%).

Small and medium enterprises are the most significant employers with only 3% of South West businesses employing more than 20 staff. Most production in the region is small scale and relies on premium markets to generate return on investment.

Marketing premium quality product is the principle characteristic of South West competitiveness.

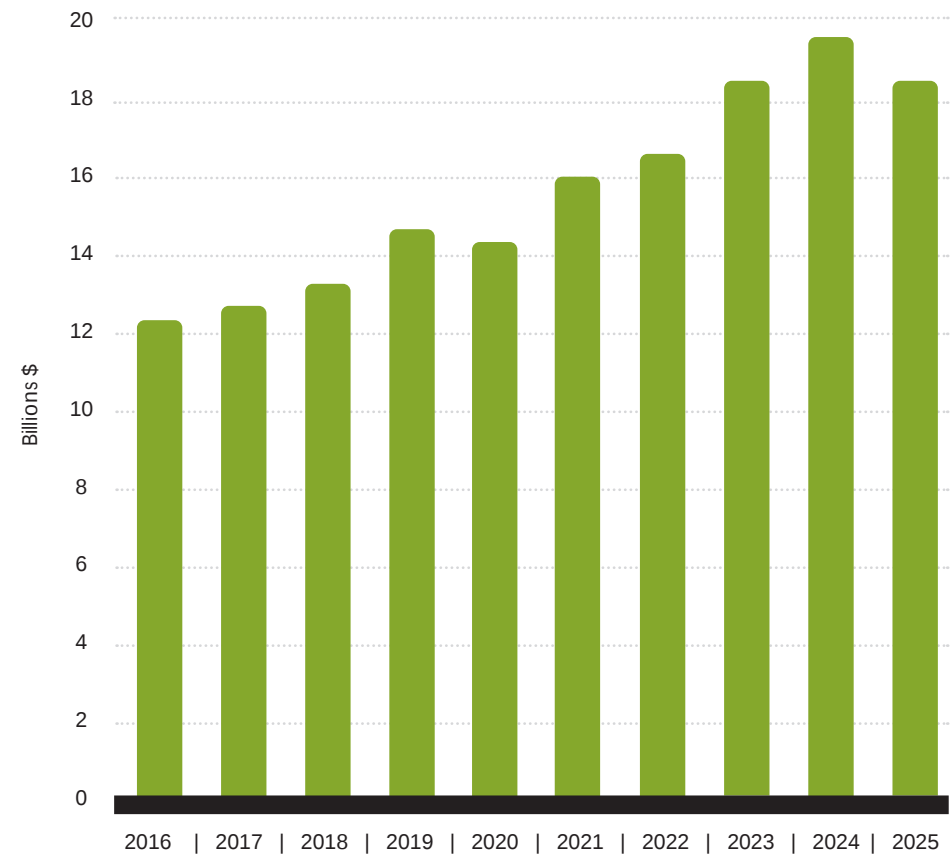


Figure 1 – South West Gross Regional Product, nominal terms, 2016-2025

Source: ABS 2021 Census Place of Work Employment (Scaled), ABS 2013/2023 National Input Output Tables, ABS June 2016-2025 Gross State Product, REMPLAN Economy 2025

3.1 Framework for analysis

With the regional data and megatrends highlighted, an opportunity exists to look at South West data and overall prospects, and then discuss through the lens of agreed regional development determinants as established by the Council of Australian Governments and accounting for both the Australian Government's regional priorities and the Western Australian Government's regional strategic vision as delivered through the South West Development Commission (SWDC).

3.1.1 Determinants of regional development

- Connectivity and infrastructure: Access to international, national and regional markets (including supply chain infrastructure and digital capacity).
- Regional employment and business: Comparative advantage and business competitiveness boosted by clustering, R&D and a strategic regional vision.
- Human capital and skills: Adaptable and educated workforces supported by further and higher education facilities.
- Sustainable (economically, environmentally and socially) communities and population: supporting liveability, natural resources, opportunities and jobs.
- Effective cross-sectoral and intergovernmental partnerships and integrated regional planning: collaborative approaches provided by regional leadership, shared goals and including the Aboriginal community.



3.1.2 WA Government priorities 2025-2029

- Jobs - Diversifying the WA economy so that it remains the strongest in the nation.
- Health - Ensuring all Western Australians can access the healthcare they need, when they need it.
- Housing - Ensuring every Western Australian has a home.
- Community - Building safe and inclusive communities.
- Environment - Protecting and restoring our environment.
- Infrastructure and services - Delivering quality infrastructure and services across the State.

In relation to these themes, SWDC notes the following 5 key priorities:

1. Economic growth - Facilitate conditions for sustainable economic growth.
2. Innovation - Drive innovation and collaboration in key industries.
3. Aboriginal prosperity - Foster opportunities for Aboriginal empowerment and prosperity.
4. Communities - Ensure communities are vibrant, connected and have the services and infrastructure they need.
5. Excellence - Deliver with excellence in governance and engagement.

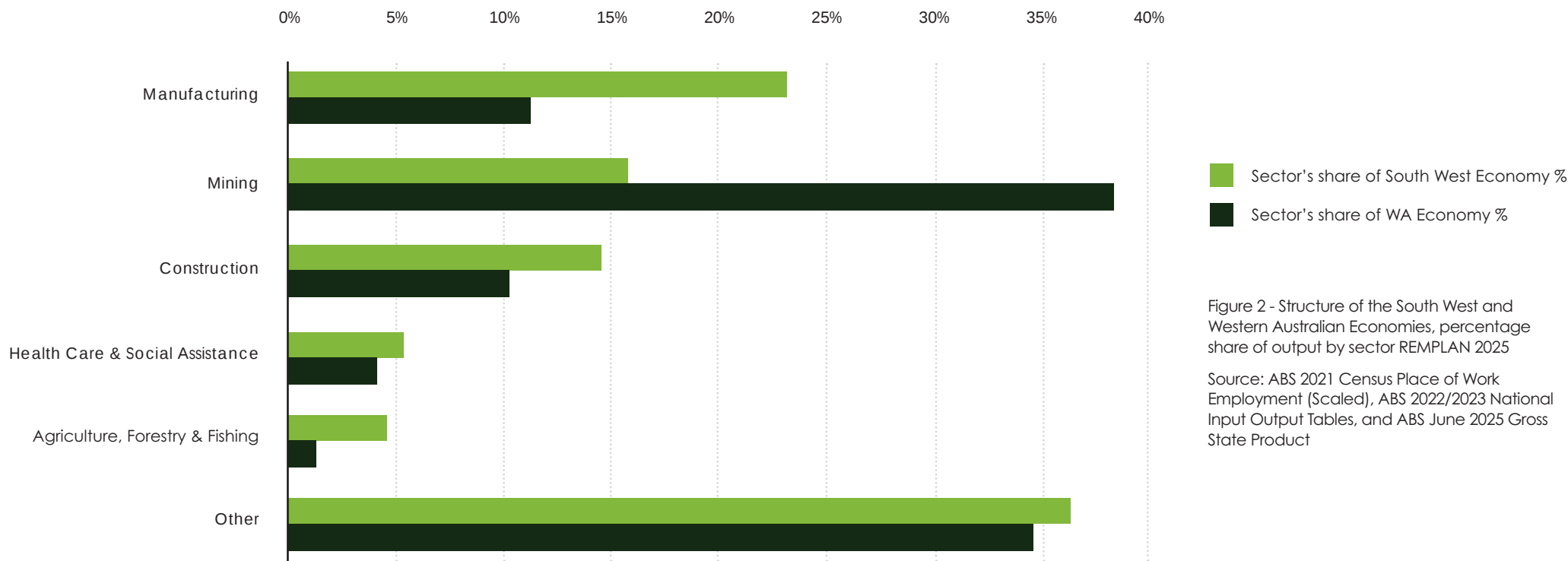


Figure 2 - Structure of the South West and Western Australian Economies, percentage share of output by sector REMPLAN 2025

Source: ABS 2021 Census Place of Work Employment (Scaled), ABS 2022/2023 National Input Output Tables, and ABS June 2025 Gross State Product

3.1.3 Regional SWOT

This forms a mix of domestic and bigger picture prospects and pressures

STRENGTHS

- Regional economic diversity
- Resources processing
- Transport infrastructure (road, rail, airport, maritime)
- Clean, green brand/reputation
- Softwood timber industry cluster
- Position in Asia and on the Indian Ocean
- Geo-landscapes and natural beauty
- Regional liveability and lifestyle attractors
- Proximity to the State capital
- Sustainable population
- South West Health-Education Precinct

WEAKNESSES

- Distance from major population centres
- Population demographic, particularly ageing in some areas
- Critical mass of people in the hinterland
- Number of seasonal/low paid jobs
- Water infrastructure for agriculture, industry and urban liveability
- Reliance on seasonal workforces
- Reliability of energy
- Constricted housing supplies and high rents
- Limitations on waste facilities
- Lack of fill materials for development

OPPORTUNITIES

- High tech manufacturing and digital technologies
- Public/private sector decentralisation
- Growth in agriculture and food demand
- Growing Bunbury as WA's second city (in every sense)
- Waste as a resource
- Renewable energy
- Proximity to SE Asian markets and Busselton-Margaret River Airport
- Alternative building and infrastructure construction practices
- Education to meet skills needs
- Climate studies and pilot projects
- Improved tourism product
- Increasing liveability

THREATS

- Housing and worker accommodation shortages
- Climate change and declining rainfall
- Water security, quality and quantity
- Slow pace of energy transition
- China trade relationship
- Poor appetite for long term investment (plantations)
- The cost of energy and commodity price volatility
- Ageing population
- Biosecurity and disease
- Investment in long-standing resources has flat-lined
- The cost of doing business in the South West
- Bushfire and coastal inundation

3.2 Region and prospects

The region and its prospects will be discussed in reference to trends that point to the future and best practice economic development principles. Infrastructure Australia (2021) and the Regional Australia Institute's Regionalisation Ambition 2032 both acknowledge the increasing attraction of small cities and regional centres which is highlighting infrastructure gaps, barriers to regionalisation and enabling investment.

3.2.1 Connectivity and infrastructure (access to markets)

Distance is an economic hurdle than can only be surmounted by world class infrastructure – roads, rail, port, airports, intermodal hubs and data superhighways. The South West's regional centre is 185km from the world's most isolated capital city. Quality infrastructure is therefore a supply chain facilitator of market access and enabler of competitiveness.

It is important to note that with much of business being digitally based then communications are as essential as traditional transport infrastructure. The South West's relative global remoteness is mitigated by quality fibre connections and paves the way for attracting decentralised public and private workforces to a region featuring outstanding natural beauty and liveability.

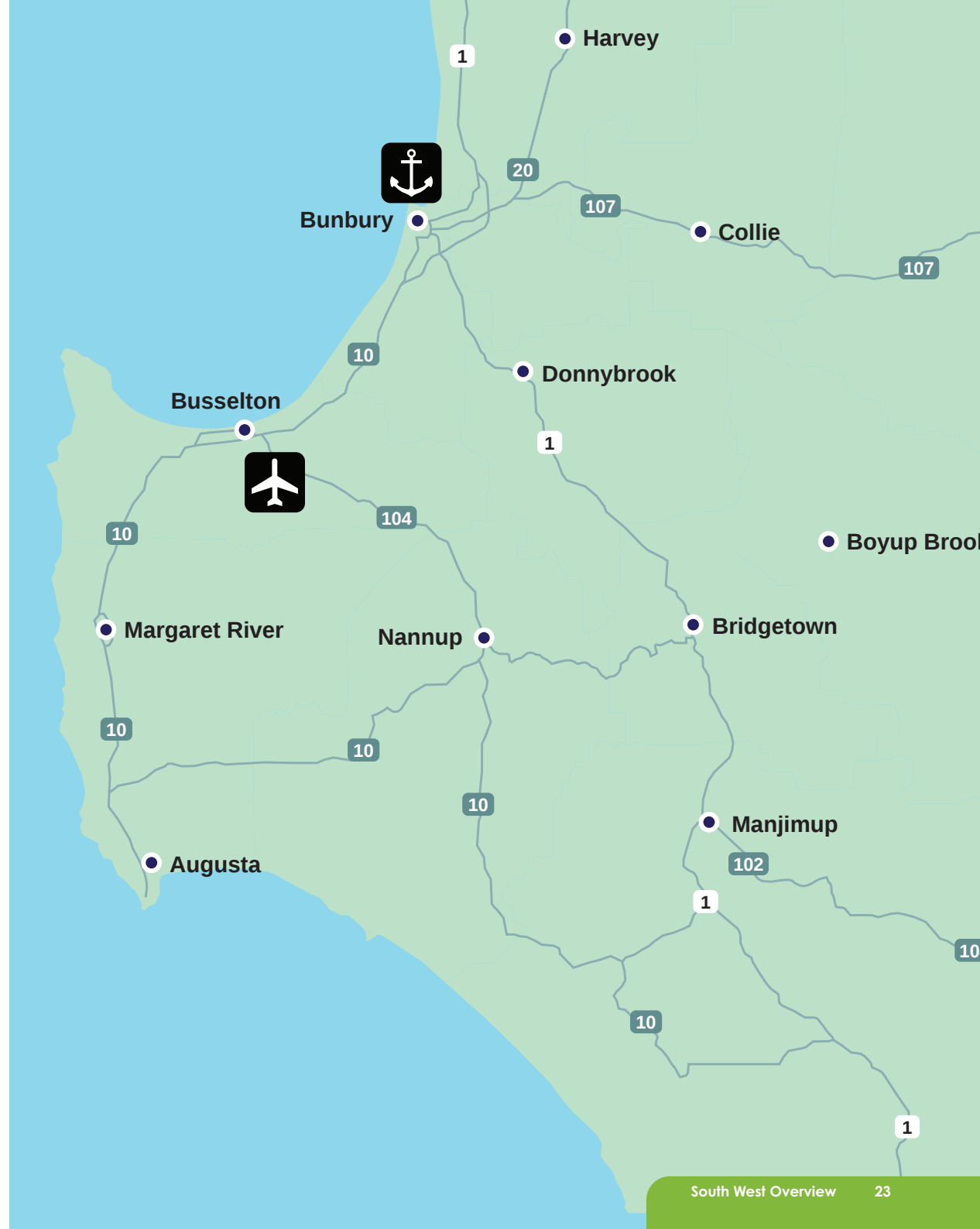




Image by City of Bunbury

Roads

The South West benefits from a high-quality road network, strengthened by the recently completed Wilman Wadandi Highway and Bussell Highway duplication. These projects have improved access to the future Waterloo Industrial Area, Kemerton, Bunbury Port, the timber precinct and the Capes region, while delivering an efficient, continuous dual carriageway between Perth and Busselton.

As traffic grows, future constraints are expected along the coastal route from Mandurah to Dunsborough. Priorities include grade-separated intersections on the Forrest and Bussell highways, duplication of the Busselton Bypass, and construction of the Vasse-Dunsborough Link which will support residential and industrial growth, airport access, and increasing freight movements. Additional passing opportunities are also required on South Western Highway.

Rail

The main Perth-Bunbury (Claisebrook-Picton) line has been close to capacity for some time, particularly from Brunswick to Picton where freight from Worsley and Collie join the line to Bunbury Port.

Priority should be given to practical staged investments: Brunswick-Picton capacity improvements, Bunbury Port rail access, grade separation where justified, and strategic assessment of intermodal terminal opportunities to support supply chain efficiencies, productivity and industry growth.

Upgraded Bunbury-Perth passenger services have been restored and will be boosted by four new, three-car train sets that will enter service in stages over 12 months.

The Australind train will return to full service levels later in the year and will double services from 2027.

Bunbury Port

The port operates across the Inner and Outer Harbours, although management of the southern section of the latter has been handed to the WA Department of Transport. This will free up land for integration into the Bunbury Waterfront project over the coming decade.

The Inner Harbour features 400ha of quality and available development land with potential to accommodate overflows from Kwinana and Fremantle. Bunbury Port has continued to meet regional trade demand since it was founded in 1864 and adapts to market changes. Current trade continues to be 17-18mtpa. Organic growth is expected in the years ahead.

While the Westport Taskforce recommendations on container options focused on Perth, about 30,000TEUs (Twenty-foot Equivalent Units) are now generated in the South West each year. Pressures on the Western Trade Coast has maintained interest in Bunbury as a potential roll on/off (ro-ro) port in the coming years, and several studies continue to focus on the future trade scenarios on the West Coast.

Regionally, the port has a critical role in facilitating trade and servicing the resources sector which produces the bulk of the region's output wealth. With changing energy demands, the port is experiencing greater engagement with renewable energy projects and will continue to facilitate the future energy trade requirements for the region.

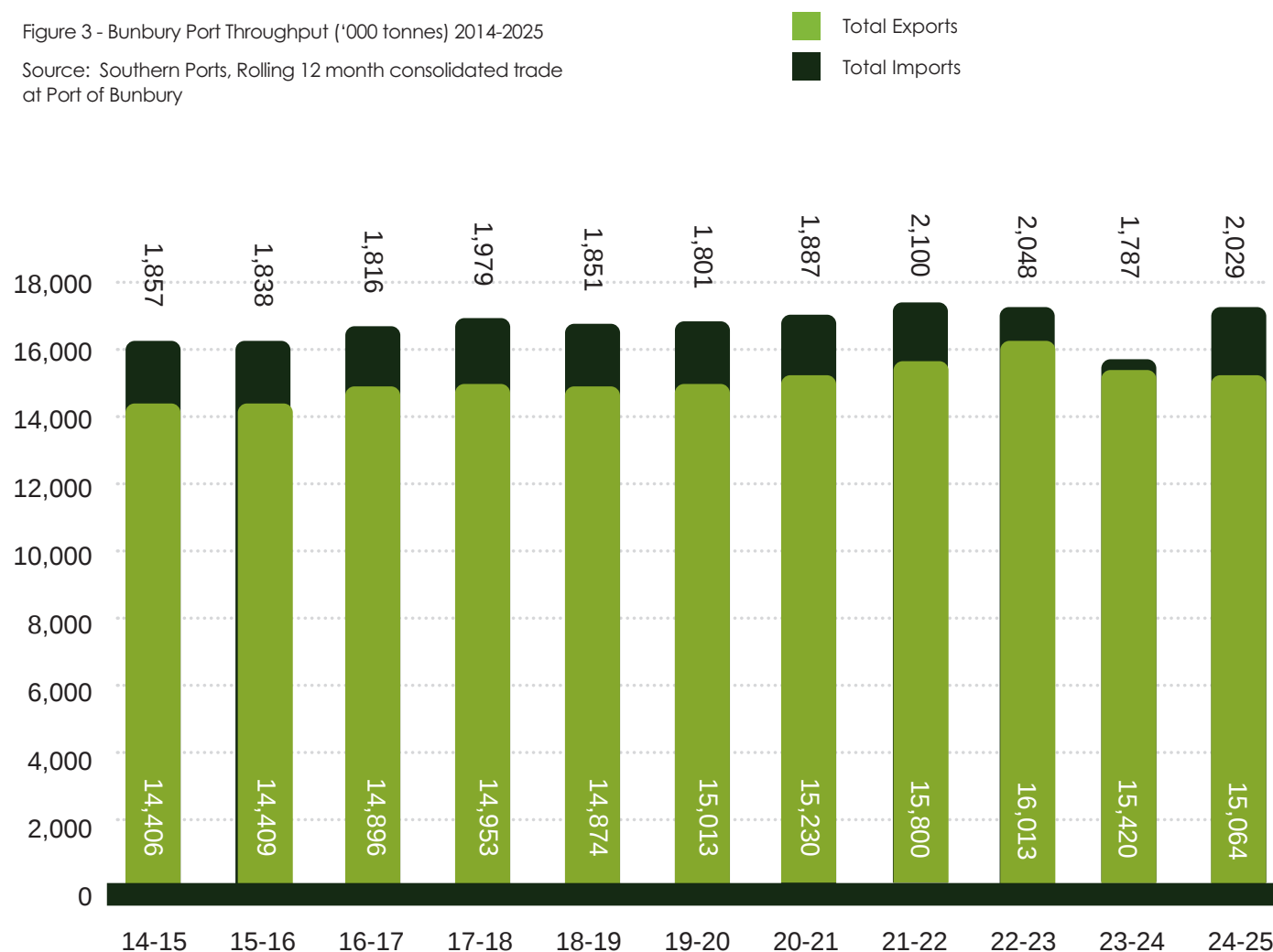


Image by Bunbury Port

Strategies to support Energy and Water Infrastructure

- Encourage investment in renewable energy production and battery storage to decarbonise the future.
- Envision renewable energy as boosting the credentials for industry and the South West's clean/green reputation.
- Three-phase power provision for light industry precincts and water supplies at a pressure necessary for fighting fires.
- Progress upgrading open channels to piped irrigation in the Collie River Irrigation District.
- Encourage R+D and investment in water infrastructure and improve irrigation efficiency through consolidated schemes.
- Monitor the legislated introduction of water trading as a tool to drive efficiencies in a drying climate.
- Increased use of 'waste' water resources for reuse and/or aquifer recharge.
- Integrate sustainable water and power principles in any retrofit or new builds.

Figure 3 - Bunbury Port Throughput ('000 tonnes) 2014-2025
Source: Southern Ports, Rolling 12 month consolidated trade at Port of Bunbury



Airports

Busselton Margaret River Airport (BMRA) is the region's principal aviation gateway. Recent airside redevelopment has delivered a 2,520m runway capable of accommodating Code 4E aircraft (Boeing 737s, Airbus A320 and A330 models) with the capacity to reach China.

Jetstar is the primary passenger carrier, operating direct flights to Melbourne and Sydney. BMRA also supports 36 scheduled fly in fly out (FIFO) charter flights to eleven mine sites across Western Australia, reinforcing its importance to the resources sector.

Passenger growth has surged, with over 200,000 travellers expected again in 2026 - almost a tenfold increase over six years. This growth is delivering strong economic returns, boosting visitor spending across accommodation, hospitality and tourism experiences, and supporting hundreds of local jobs. However, demand is now exceeding existing landside capacity, placing pressure on facilities and limiting further growth.

To fully realise BMRA's potential, targeted investment is essential. A fit for purpose terminal and expanded landside infra-structure are critical to accommodating future

demand, improving passenger experience and attracting additional airline services. Without this investment, the region risks constraining tourism growth and missing broader economic opportunities.

Beyond scheduled services, BMRA supports emergency services, tourism operators, charters and general aviation, and serves as an alternate airport to Perth. With adjoining greenfield land available, the airport features lease-ready lots and is well placed to support future expansion in freight, logistics and aviation related industries - strengthening its role as a key economic driver for the South West.

Bunbury Airport has WA's highest number of light aircraft movements after Jandakot in Perth. Bunbury services private aviators and supports three flying schools as well as the region's rescue helicopter and seasonal water bombers. The site is home to more than 50 hangars and 100 aircraft. Expansion would require the realignment of the South Western Highway.

Manjimup Airfield caters for various aviation services such as the RFDS, emergency fire-fighting, private aircraft and has a small number of FIFO flights.

Image by City of Busselton, Busselton Margaret River Airport





Image by Russell Ord Photography

Energy

The energy landscape is creating opportunities and unprecedented threats in equal measure. The Australian Energy Market Operator (AEMO) 2025 report concludes that 1,700 MW of ageing coal and gas power stations are expected to retire from 2027-32. There are plans to phase out coal by 2030, but renewable energy projects will not be developed fast enough to cover a predicted 932 MW shortfall in the next two years.

Coordinated by WA Treasury, the SWIS Demand Assessment estimates peak demand in the South West Interconnected System (SWIS) will more than triple by 2042. That means the South West could require up to 51GW of new energy generation and storage capacity to meet the needs of industry over the next 20 years. That will leave the South West with a serious energy supply deficit although 500MW of new grid-scale batteries are helping balance supply and demand which is being challenged by a lengthening demand period – and growth.

With shortfall predicted, the reality is that if coal-fired power stations closures are firm, then there will need to be significant (and immediate) energy investment.

Collie is at the centre of the SWIS transmission network and has attracted multi-billion-dollar battery investments. These will help stabilise the grid and better manage solar. Domestic penetration of rooftop solar

in WA is the highest in the world and it is expected to blow out to 50% by 2030.

The 2025 Electrical Statement of Opportunities report notes: "In 2027-28, following the closure of more coal-fired generation, more capacity will need to be procured ... to avert energy shortfalls that are otherwise forecast to become more prevalent. While there is substantial continued interest in battery storage to help maintain reliable supply, investment in storage alone will not suffice. At least 110 MW of new generation sources such as gas, wind and solar generation will be required."

The South West economy is dominated by manufacturing. Alcoa, South32, Iluka Resources, Tronox and Simcoa all have huge energy demands. Resolving the energy challenge is the leading issue in the region. It is unlikely that sufficiently scaled wind infrastructure will be producing energy before 2033-34. It is therefore increasingly urgent that projects are fast-tracked as soon as possible, along with an extended transmission line network to take best advantage of low population and consistent, clean wind opportunities.

The region also needs to look to green hydrogen. The WA Renewable Hydrogen Roadmap supports remote communities and fuelling vehicles, particularly in return-to-base operations such as mining and waste services.

Telecommunications

The South West is well served by reliable nbn digital infrastructure, with Business Fibre Zones operating in Bunbury, Busselton, Margaret River and Collie, and an expanding fibre footprint across the region.

Eligible residential customers can access services supporting download speeds of up to 2 Gbps on full fibre connections, while businesses within Business Fibre Zones can access enterprise-grade fibre services supporting symmetrical speeds of up to 10 Gbps.

Continued investment in nbn's fixed wireless network, fibre expansion and Low Earth Orbit (LEO) satellite technologies is improving connectivity across all regional communities. These developments provide a strong foundation for the South West's ambitions to establish a Digital Innovation District and Advanced Manufacturing and Technology Hub.

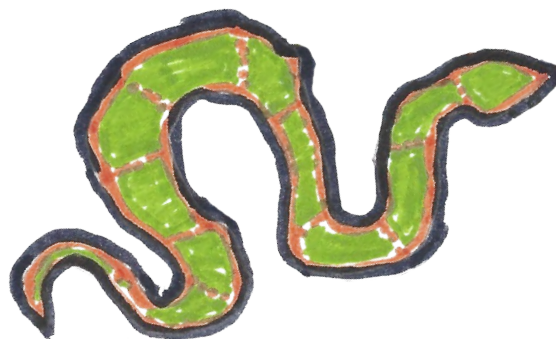
Telstra, with partners Ericsson and Qualcomm, recorded the world's fastest 5G Standalone uplink speed on a live commercial network. Using mid band 5G spectrum assets, including aggregated spectrum in the 2.6 GHz and 3.6 GHz bands, the breakthrough reached peak uplink speeds of 682 Mbps which will ultimately support upload performance for real time, data intensive experiences such as live streams and the next generation of AI-first mobile apps.

Water

Water security will be one of the region's greatest challenges. CSIRO found that the South West was 'one of the most water challenged' parts of the country. Rainfall has declined 15% since 1975 and continues to see a contraction along a NW-SE axis towards Cape Leeuwin.

Agriculture uses about 60% of all water in the region and the 185GL Wellington Dam (the State's second largest surface water supply) is increasing in salinity. The dam's salinity levels of 1,000-1,500 mg/L (WA Government) have resulted from clearing in Collie River East Branch and are well above the 500 mg/L total dissolved salts acceptable for potable water. It is also considered too high for sustaining irrigation. Industry leaders believe that water is under-valued and so users can be wasteful, particularly in industry.

The prospects for water security are concerning without significant investment. It is preferred that interventions are pre-emptive rather than reactive.



Strategies to support connectivity and infrastructure

- Complete road and standard gauge rail links to the Port of Bunbury, delivering through the Wilman-Wadandi Highway and associated transport infrastructure.
- Boost supply chain improvement opportunities through an Inter-modal Terminal (IMT). Link industrial parks, the port and interoperable transport connections via the IMT and staging areas, including standard gauge rail.
- Upgrade the port to support projected trade expansion and to cater for additional traffic related to renewable energy projects.
- Plan for the longer term delivery of the Busselton Outer Bypass, investigating options of first putting in place a Dunsborough-Vasse Link.
- Create more passing places on busy single lane roads, particularly the South Western Highway.
- Prepare for the delivery of the Brunswick rail duplication.
- Prepare to take advantage of the likely overspill of maritime-based businesses from the Henderson Defence Precinct and surrounds to Bunbury.
- Expand Busselton Margaret River Airport infrastructure to provide visitors with a premium experience and exporters with freight options.
- Consider bigger picture utilities infrastructure to support growth and environmental values.
- Continually drive communications upgrades to remain competitive and to support communities.
- Provide leading edge internet connections throughout the region's rural areas, particularly supporting farming communities.



3.2.2 Business (comparative advantage and business competitiveness)

Competitive advantage comes at the intersection of comparative advantage, market access and opportunity. The South West features aspects of different industry sectors with focus points based on inherent advantage – resources, agriculture and natural beauty.

Mining, Mineral Processing and Mining Equipment, Technology & Services (METS)

The importance of the mining sector to Western Australia is well recognised, although the contribution of mining, mineral processing and associated manufacturing to the South West economy is often underappreciated. Together, mining and manufacturing account for about a third of regional economic output and continue to underpin jobs, exports and investment.

The South West possesses one of Australia's most diverse mineral processing sectors. It is home to the world's largest hard rock lithium operation, internationally significant alumina refineries, major mineral sands producers and critical minerals processing. While lithium markets have moderated following the unprecedented highs of 2022–23, the Greenbushes operation is world class and has an anticipated 20-year mine life.

The alumina processing landscape is likely to change due to Alcoa's \$8bn acquisition of South32 at Worsley which is likely to be finalised in early 2027.

Mineral sands remain an important regional industry through the operations of Tronox, Iluka and Doral, supplying titanium dioxide feedstocks, zircon and associated critical minerals.

Increasing international focus on secure supply chains for defence, advanced manufacturing and renewable energy technologies presents opportunities for further value-adding and downstream processing within Western Australia.

The region is also undergoing significant industrial transformation centred on Collie, where investment in graphite processing, magnesium production, green steel manufacturing and battery technologies is complementing the traditional mining sector. These industries strengthen the South West's role in supplying materials essential to the global energy transition.

Employment statistics understate the sector's regional importance as direct workforces are supplemented by supporting businesses and contractors. A large cohort of South West FIFO workers are deployed throughout the State. Likewise, Alcoa's Wagerup alumina refinery is located just beyond the regional boundary in the Peel region, yet much of its workforce resides in the South West and exports are shipped through the Port of Bunbury.

Regional opportunities for Mining Equipment, Technology and Services (METS) businesses remain strong, supported by growth in critical minerals, renewable energy and advanced manufacturing.

Image: Talison Lithium

South West Mineral Value (by Commodity) 2024-25

Tin Tantalum Lithium	\$1,821,964,566
Coal & Mineral Sands	\$632,488,074
Limesand Limestone	\$4,590,551
Construction Materials & Sandstone	\$2,473,088

South West Total \$2,461,516,279

South West Mineral Value (by LGA) 2024-25

Bridgetown-Greenbushes & Manjimup	\$1,821,990,752
Collie & Donnybrook-Balingup	\$503,682,056
Busselton & Augusta Margaret River	\$133,394,206
Harvey	\$2,449,265

South West Total \$2,461,516,279

South West Mining Employment (by LGA) 2024-25

Augusta-Margaret River	6
Bridgetown-Greenbushes	571
Bunbury	2,174
Busselton	66
Capel	296
Collie	2,782
Harvey	990

South West Total 6,886

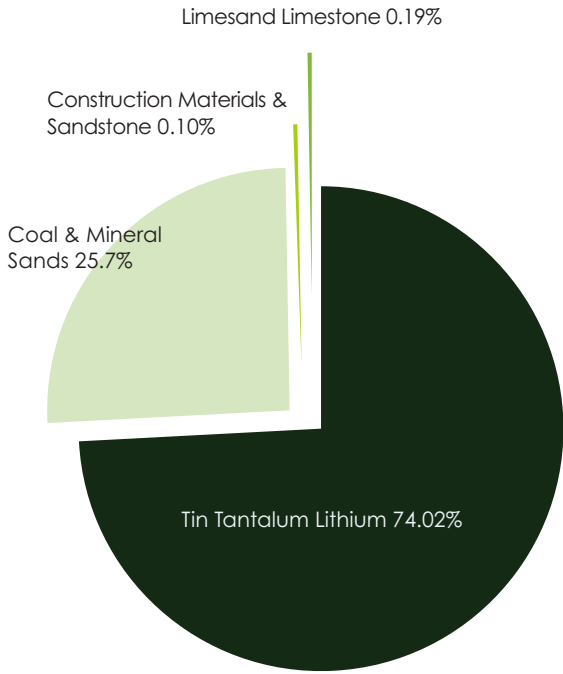


Figure 4 - Value of Mining in the South West
Source: DEMIRS 2024-2025 Spatial and regional data file

Strategies to support mining competitiveness

- Improving transport efficiency through standard gauge rail and interoperable freight networks connected through an intermodal terminal linking in with the port of Bunbury and the Kemerton Strategic Industrial Area.
- Improving current reliability and capacity in the South West Interconnected System (SWIS) to service existing demand.
- The development of a reliable and cost-competitive green energy grid from 2030 with the capacity to service an increase in future commercial and industrial loads as forecast by the State Government's SWIS Demand Assessment.
- Major streamlining of existing environmental approvals processes that avoid Federal and State Government duplication while preserving existing levels of scrutiny that ensure industry maintains its robust environmental credentials.
- Access to accessible turnkey industry-ready land serviced by power and water.
- Expanded port capacity to facilitate efficient turnaround of imports and exports with storage facilities and laydown areas capable of accommodating both regular trade products and bulk renewable infrastructural imports.
- Government-led incentives to develop markets and innovative uses for by-products.
- Co-investment in downstream value-adding.
- Move towards knowledge clustering in advanced manufacturing, and direct industry input.
- Skills development and industry links to support the sector.



Agriculture

Agriculture, forestry and fishing is a large, fragmented industry that contributes \$2.02bn (4.7%) to economic output, with Manjimup the leading area and accounting for more than \$418m in annual output (ABS 2025).

Farming takes up 7,100km² of land area in a region that has typically enjoyed reliable rainfall. However, recent years have been one of the lowest rainfall years in recent memory and producers in the region have struggled with livestock management and survival of plantation trees and vines. Re-examining water needs and how to meet them will be critical as efforts to support adaptation and dry season business management pivots from other areas of the state to the South West.

Being home to smaller farms and more intensive production methods than other primary production regions of the state, the South West faces challenges in the management of chemicals, fertilisers and effluent in areas that are closer to water sources and more urban environments. Scale also impacts on investment in mechanisation/technology upgrades which can reduce labour needs, an issue that has blighted the region especially at harvest time.

The uncertain future associated with the Boyanup Saleyards has opened up the concept for the development of the proposed South West Agribusiness Precinct. This would be an enabler for collectively working at scale, value adding and manufacturing products to reduce waste. The South West Agribusiness Precinct would also play to the region's strengths given that industry classifications with more than half the State's total contribution include: onions (100%), avocado (89%), potatoes (86%), apples (84%), dairy production (82%), carrots (53%), and wine grapes (65%).

Figure 5 – Value of agricultural production - South West

Source: ABARES Top Commodities by Value (Bunbury SA4), 2020-2021

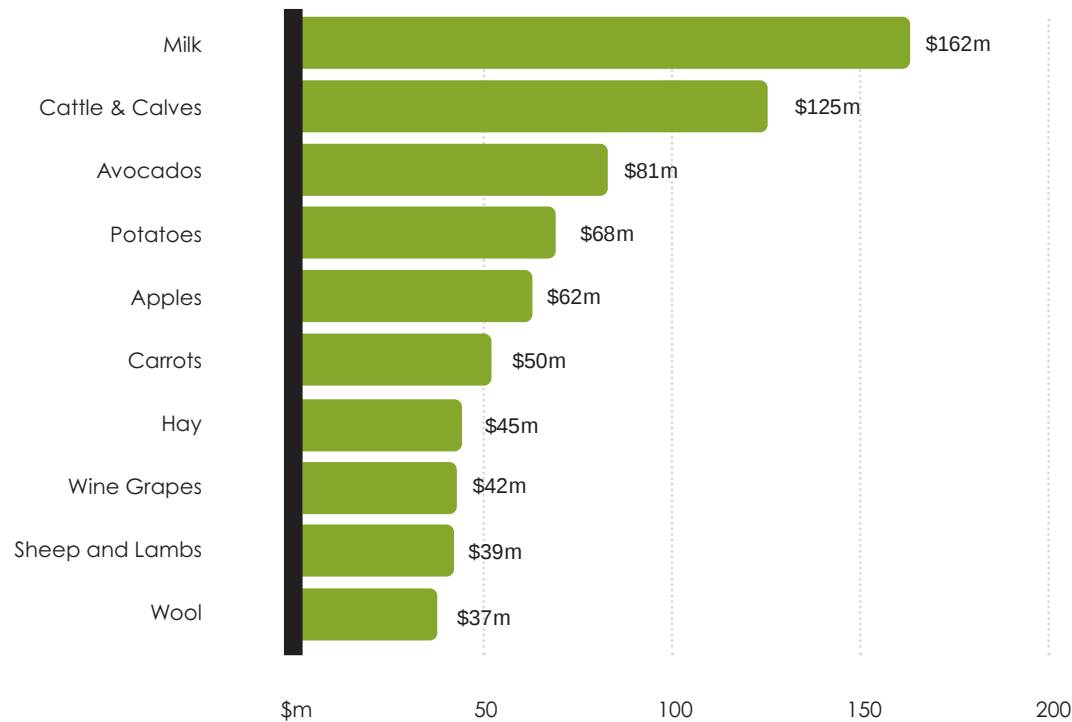


Image by Tourism WA, Fraser Gallop Winery

Strategies to support the agriculture sector

- Implement immediate action on adaptation to water scarcity and quality, particularly for irrigation and re-engineering dams.
- Protect the highest quality land for agriculture.
- Introducing regenerative agriculture on marginal land and areas where soils are degraded.
- Support export opportunities in new markets, targeting growth areas and enhance the brand.
- Increase investment in food processing capacity within the region, with an emphasis on clusters and knowledge sharing.
- Facilitate access to investment capital to increase scale of production, value add and diversify.
- Support technological solutions, encouraging R+D and investment in water infrastructure and improve irrigation efficiency through consolidated schemes.
- Monitor water trading as a tool to drive efficiencies in a drying climate.
- Increase high capacity broadband to improve efficiencies in automation.
- Promote policy, identifying regulatory barriers and seeking solutions.
- Support and encourage new common user infrastructure such as saleyards and transport systems.
- Address dryland salinity through value plantations, particularly in the East Collie catchment.
- Find ways to reduce waste and utilise food that does not meet consumer expectations, eg blemished fruit.



Viticulture

The South West's wine regions (Margaret River, Geographe, Pemberton, Blackwood Valley and Manjimup) accounted for 79% of Western Australia's winegrape crush in 2025. Two-thirds of the state crush (27,905t) was from Margaret River alone.

The Margaret River figures show a 3% decline from the previous year. However, the State Government estimates state value at \$103m which indicates South West value of about \$85m. The inference is drawn from aggregating the data, although the regional value is likely to be higher given the premium quality of Margaret River produce.

The removal of Chinese tariffs saw the Australian export market bounce back and underlined in importance as other markets, particularly North America, contracted (Wine Australia, 2025). Weather conditions have been perfect for viticulture, leading to the 2025 vintage being hailed as exceptional for both red and white varieties and akin to the 2023 standout year. The Blackwood Valley is reporting excellence for 2026.

The Geographe wine region continues to grow in reputation along with The Blackwood Valley, Manjimup and Pemberton regions.

Fisheries

Fisheries, particularly aquaculture, has increasingly realised its potential particularly in marron farming at Capel and abalone along the south coast. In respect of recreational fishing, a demersal species ban is in effect across almost all the South West until Spring 2027 to protect dhufish and snapper in particular. With just Windy Harbour accessible outside the ban area, pressure has been put on those boat launch facilities.

Timber

The timber industry is in the midst of unprecedented change and challenges. Two-thirds of the South West region is native forest but the vast majority of that resource has been set aside for conservation.

South West forestry was traditionally a mix of regrowth native hardwood, plantation hardwood and softwoods. However, commercial harvesting of native forest ended with implementation of the new Forestry Management Plan 2024-2033. This has left WA increasingly reliant on hardwood timber imports, but has created plantation opportunities for softwood (pine) and hardwood (bluegum).

Funded by the Australian Government to 2027-28, the South West Timber Hub is one of 11 nationally and includes the South West and Great Southern regions. The priorities identified by the South West Timber Hub now focus on supporting growth in plantations and the utilisation of fibre from ecological forest thinning:

- Undertaking research projects aiming to expand the softwood plantation estate by at least 5,000ha annually, with a focus on integrating commercial trees on farmlands;
- Encouraging full utilisation of the available wood fibre; and
- Ensuring community understanding of the environmental, regional, social and economic benefits from managed forests and woodlands.

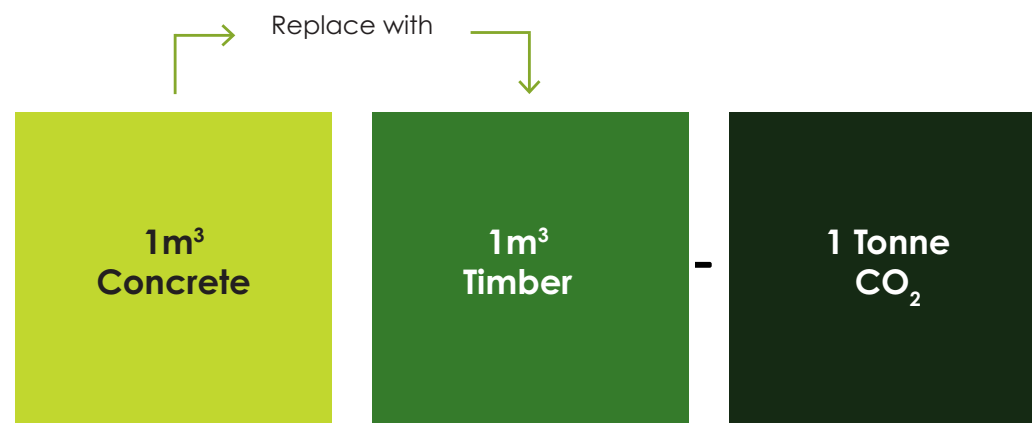
Forestry is being challenged by a drying climate. Geographically, the lower south western part of WA enjoys a natural rainfall advantage, although the 600mm precipitation line is retreating (westward). This is impacting on suitable land to establish more plantations.

The onflow from forestry is manufacturing. The Dardanup timber precinct captures Laminex, one of Australia's leading particle board manufacturers, and Wespine which produces the vast majority of the State's construction timbers. Koppers produces WA's power poles. There are other local interests in fibre processing including WAPRES which processes pine and bluegum for both export and domestic sales. Exports were approximately 755k mt (2024).

Timber sourced from sustainable forest management supports a local processing and manufacturing capability. Processing locally grown and harvested timber adds value and jobs while providing our community with the ultimate renewable

construction material. However, there is a shortfall of plantation softwood and a need for planting at least an additional 50,000ha to sustain existing processing capacity to meet the forecast industry demand in the years ahead. The State Government committed \$350m to plantation softwoods (2021-31) and added 7,000ha in 2025-26. Considerable opportunities exist for private sector investment in plantations.

New technologies are helping ensure that every fibre of resource is utilised and efficiencies can support opportunities in log peeling, veneer production, and Engineered Wood Products (EWP) including expanding LVL production or alternative cross laminate timber (CLT) manufacturing.



Credit: Planet Ark

Strategies to support the timber and forestry sector

- Encourage investment in expanding the plantation estate.
- Investigate modelling to reduce forest risks in a drying climate
- Encourage the adoption of Planet Ark's Wood First policy among Local Government bodies in line with WA Government wood procurement policy.
- Investigate opportunities for developing engineered wood products (laminates, ply-woods, cross-laminate timbers, veneers and more) in the South West.
- Ensure 'wood first' is embedded in government procurement policies.
- Support and encourage growth of the Dardanup cluster, explore opportunities for an Advanced Timber Manufacturing Hub.
- Manage forests in a drying climate, eco-thinning and utilising fibre.
- Support biomass waste as an energy option, maximising the use of fibre and producing bio-char for regenerative agriculture.
- Encourage Aboriginal engagement in forestry, bushfire mitigation and employment in caring for country.
- Look at alternative tree species that are more drought tolerant.
- Support advanced manufacturing of homes, including modular construction methodologies to produce affordable housing.
- Explore how blockchain technologies can provide consumer confidence in sustainable forestry practices and South West supplies.
- Continue to drive plantation options as a part of minesite rehabilitation.



Image by City of Busselton, Boranup Forest

Tourism

The tendency to measure the impact of tourism in financial terms never hits the mark since its benefits and true value stretch way beyond dollars and cents. Tourism creates vibrancy, echoes lifestyle and speaks to brand messages that reach beyond food and accommodation services (FAS).

While a number of regional communities value tourism, the key industry sector lies in the Capes where tourism jobs (2025) dominate: Busselton 16.8% and Margaret River 20.2%. The sector contributes through Food and Accommodation Services but also in retail, services and even manufacturing. The total of tourism jobs for the South West region is 9.4% compared to tourism employment across Western Australia generally at 5.6%. The economic value of the sector (2025) was estimated at more than \$1.9bn with more than half of that in the Capes sub-region: Busselton \$795m and Margaret River \$389m.

The region clearly benefits from its natural beauty, amazing landscapes and proximity to the Perth intra-state

market. Quality events are also strong triggers for regional visitation which is supported by trails, food and beverage, cultural enrichment and visitors seeking positive/wellness experiences.

There are significant opportunities for Aboriginal cultural tourism, building on existing attractions, while new trails, improvements to the existing trails and world class cycling tracks add to the region's emotional drivers.

Prospects for an increasingly strong sector abound, but the strength of the sector in local employment is also its vulnerability. Given that the South West is noted as the seventh most tourism dependent region in Australia across different measures (Tourism Research Australia), building resilience through capacity and capability building to manage cyclical changes and shocks is essential. The sharing economy has also affected businesses, with Airbnb having an impact on professional accommodation services.

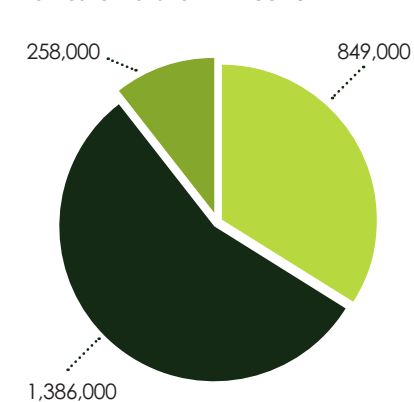
Accommodation and hospitality are traditionally less well paid than other sectors. This can be a challenge when those workers find themselves living in a tourism hotspots where living expenses are typically higher than average. The added complication is the current shortage of affordable housing.

Figure 6 - Overnight and International Visitation - South West Sub regions

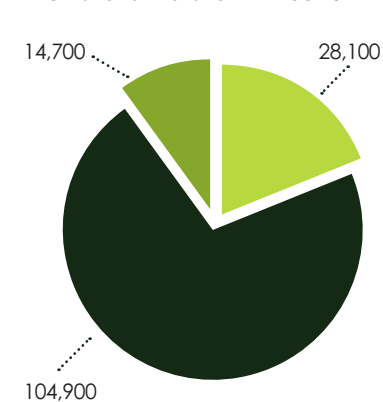
Source: Tourism Research Australia - Domestic Tourism Statistics and International Visitor Survey

- Southern Forests & Valleys
- Margaret River Region
- Bunbury Geopraphe

Domestic Visitation YE Dec 25



International Visitation YE Dec 25



Activities, attractions & events		Bunbury-Geographe	Margaret River Region	Southern Forests & Valleys
Culture & Heritage	Nature/biodiversity	S	S	S
	Arts & creativity	E	S	D
	Aboriginal culture	D	E	D
	History & heritage	D	E	E
	Adventure	S	S	E
	Wine, food & produce	E	S	E
	Events & festivals	S	S	S

S Signature product, well established and represented

E Emerging product is established and growing

D Development opportunity

Source: Australia's South West Tourism Destination Management Plan

Domestic Visitor Spend to Australia's South West Sub-regions Dec 25

Bunbury Geographe	Overnight	\$538m
	Day trips	\$235m
	Total	\$773m
Margaret River Region	Overnight	\$1047m
	Day trips	\$129m
	Total	\$1176m
Southern Forests & Valleys	Overnight	\$152m
	Day trips	\$36m
	Total	\$188m

Source: Tourism Research Australia - Domestic Tourism Statistics

Strategies to support the tourism sector

- Construct a fit-for-purpose Busselton Margaret River Airport terminal and fit-out to a standard that gives visitors a quality experience with provision to accommodate international tourists at a later date.
- Encourage high quality and eco-certified accommodation developments.
- Invest in first class attractions that add value to the region as a whole.
- Sub-regions should focus on place-based advantages, aligning with the region's Tourism Destination Management Plan. For example, experience and product development in adventure tourism and trails, wellness, arts culture and heritage, and agritourism.
- Attract and grow demand in higher yield markets and values-based travellers to identified niches including trails, food and wine, wellness and road trips.
- Build capacity within existing Aboriginal cultural tourism experiences ensuring the South West Aboriginal communities are part of the decision making.
- Position the region to demonstrate outstanding environmental credentials.
- Focus on place-based supply side initiatives including sustainability, aviation, niche product development, and leveraging trails investment.
- Co-ordinate and build on events, including business events, that capitalise on the regional airport and conferencing assets.
- Attract high-level events that leverage the region's quality sports infrastructure assets.
- Capitalise on geo-landscapes and the region's unique geology.
- Ensure quality telecommunications connectivity to enhance visitor experiences.
- Leverage and support the Australia's South West regional brand and assets to strengthen strategic marketing across the region.
- Build greater industry capacity and capability to support sustainability of tourism across the region.
- Improve signage (directional signage, placemaking, tourism and dual naming/Aboriginal art) to assist visitors and operators.
- Consider accessibility and implement projects to support all visitors.

Strategies to support creative industries

- Liaise with regional representatives on the Creative Industries Taskforce to advocate for regional initiatives such as exploring potential sites for creative industry hubs, drawing together established businesses and start-ups.
- Provide support and investment in local creatives and precinct development to provide places to network and collaborate.
- Lever off the Creative Tech Village (CTV), the WA Creative Technology Innovation Hub headquartered in Bunbury, connecting the region's creative and immersive technology sector to state, national and international partners.
- Support the continued improvement of high capacity broadband and fibre zones to support the sector, enhancing digital infrastructure to facilitate creative output and maximise potential by facilitating 'creation anywhere'.
- Foster a collaborative ecosystem, learning from successful models in other regions which promote inclusivity, partnerships as a driver of innovation and business growth.
- Embed creative arts in the education system to nurture talent, ensuring the longevity and vibrancy of the sector.
- Embrace a vision that extends beyond traditional employment streams to integrate creative thinking into all industries, so the region is set apart from others and attracts further investment.
- Generate a film-friendly reputation via a supply of capable operators.
- Support 'buy local' strategies to help incubate the sector through local purchasing of digital media and related content.
- Support an Aboriginal art gallery and the expansion of other galleries to grow the recognition of a chain of arts and cultural attractions linking sub-regions.
- Demonstrate that the South West is a creative region through unique, place-based community infrastructure and public art.



Image by City of Bunbury

Creative sector

Economic growth, prosperity and liveability is underpinned by growth in the creative sector with creative roles being integral to many sectors, not just traditional arts and culture.

The South West region has a substantial and growing creative economy, with some hotspot areas such as Bunbury, Busselton and Margaret River showing employment levels comparable to Perth.

While diverse, creatives lie in these categories:

- Core arts and cultural industries (e.g. core arts such as literature, music, performing art and visual arts and cultural industries such as film, museums, galleries, photographic studios and libraries)
- Creative industries (e.g. sound recording, television and radio, video and computer games, heritage, publishing and print media)
- Wider creative jobs in other industries (e.g. architecture, marketing, advertising, design)

Many creative jobs contribute to the economy but are not located specifically within a creative business. Overall there are 1,467 jobs in the creative sector, but also 1,394 creative jobs that are located in 'non-creative' industries. Some examples include computer system and app design across all industries, architectural services in construction, marketing and advertising in almost any business.

Underpinning these ecosystems is the local Capes reputation for quality nationally-recognised events and festivals such as CinéfestOZ, which has helped

fuel screen industry growth over the past decade. The Bunbury-Geographe sub-region encourages creatives to connect through events such as Bunbury Fringe, and the Creative Tech Village (CTV), the WA Creative Technology Innovation Hub headquartered in Bunbury, delivering statewide programs including Bandwidth business support and the GoSH regional youth tech-innovation event, alongside maker spaces supported by local governments.

Retail

A shift in consumer behaviour has seen retail move from the most significant employer in the region to the third, accounting for 10.2% of all employment. It remains a majority employer in the Shire of Dardanup at 14.4%, and a major contributor to jobs in the tourism region of Augusta/Margaret River, and Busselton at 11.6% and 12.6%.

Changes in consumer behaviour has seen some change and has shaped CBDs in recent years. However, Local Governments have responded and there has been significant investment in Busselton and Eaton.

Nevertheless, online options, cost of living pressures, reduced disposable income and increased commercial rents combine to squeeze retailers.

It has also been recognised that shoppers are likely to demand a more enjoyable experience and greater diversity, so a number of smaller and unique outlets are more appealing than national chains.

Strategies across the retail space

- Begin processes to re-vision CBDs to provide drawcard experiences, especially supporting place-based approaches to community connections and small business in the retail space.
- Examine multi-levels in CBDs, utilising spaces above shopfronts to activate spaces by boosting resident populations and changing the lifestyle dynamic.
- Encourage casual/pop-up use of empty retail and office premises.
- Use street art and street furniture to enrich and enliven CBDs, creating unique spaces that reflect the local cultural narrative and attract people.
- Change the feel of shopping areas. Activate walking precincts through traffic calming or re-routing through-traffic, particularly in tourism towns.
- Encourage appealing shopfronts, rooftop bars and clusters of impact.
- Green urban CBDs to make them welcoming and reduce summer heat.

3.2.3 Human capital, particularly education and skills

Human capital is a significant contributor to regional development through skills, training, regional resilience and having a capable workforce. This section examines the human capacity of the South West and opportunities to strengthen the region's capability as an input to business competitiveness and overall quality of regional life.

The knowledge and skills of workers available in the labour supply is a key determinant for both business and economic growth. Those with higher education and training earn higher wages and contribute more to the economy through spillover spending (Radcliffe 2020).

The region features Western Australia's largest non-metro TAFE with six campuses in the region, while Edith Cowan University (ECU) South West, Bunbury is the largest regional campus in WA. ECU has more than

30,000 undergraduate and postgraduate students, including international students from 100 countries.

ECU South West features recognised research partnerships, study hubs and learning centres (Busselton and Collie), offering a comprehensive range of courses in arts, commerce, science, environmental health, health science, nursing, midwifery, social work and teacher education.

ECU has established the University Department of Rural Health South West. This is an academic centre which focuses on health education, research and workforce strategies to support the recruitment and retention of health professionals in the region. The initiative offers medical, nursing and midwifery and allied health students practicum placements to boost rural primary care workforce and give students a taste of rural-regional work.

In addition to the courses offered by South Regional TAFE,

there are numerous Registered Training Organisations supporting the public sector and meeting the needs in the area of apprenticeships and traineeships.

Data from the last decade shows increasing levels of educational achievement, although the South West still lags behind Greater Perth: 4.2% studying toward a bachelor or higher degree versus 1.6% in the South West (2021). The disparity may be due to the cost of education for regional students having to fund accommodation in the city, and the greater mobility of highly educated people.

The number of people undertaking tertiary training is increasing and more of the workforce now holds postschool qualifications with growth recorded in both VET and higher education qualifications.

With increasing technical knowledge required in roles that were once unskilled, it is vital that levels of higher educational continue to progress.

	Technical or Further Educational Institution	%	University or other Tertiary Institution	%	Population
Western Australia	59,902	2.2%	112,067	4.2%	2,676,904
South West	3,799	2.1%	2,813	1.6%	180,443
Warren Blackwood	268	1.5%	135	0.8%	17,615
The Capes	1,127	2.0%	903	1.6%	56,655
Bunbury Geographe	2,396	2.3%	1,775	1.7%	106,173

Figure 7 - Proportion of population 15 years and over attending university or technical education

Source: ABS 2021, Census of Population and Housing

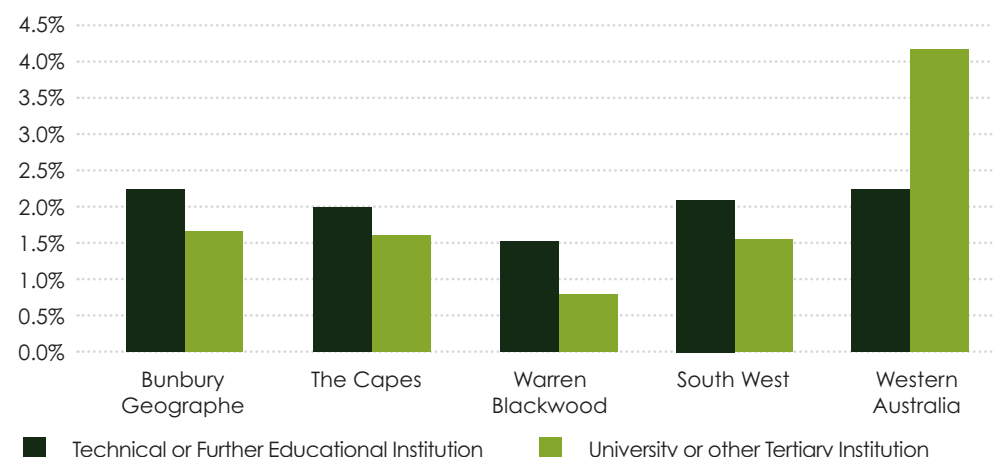


Figure 8 - Highest level of educational attainment by labour force status, 2025 (%)

Source: ABS Education and Work 2025

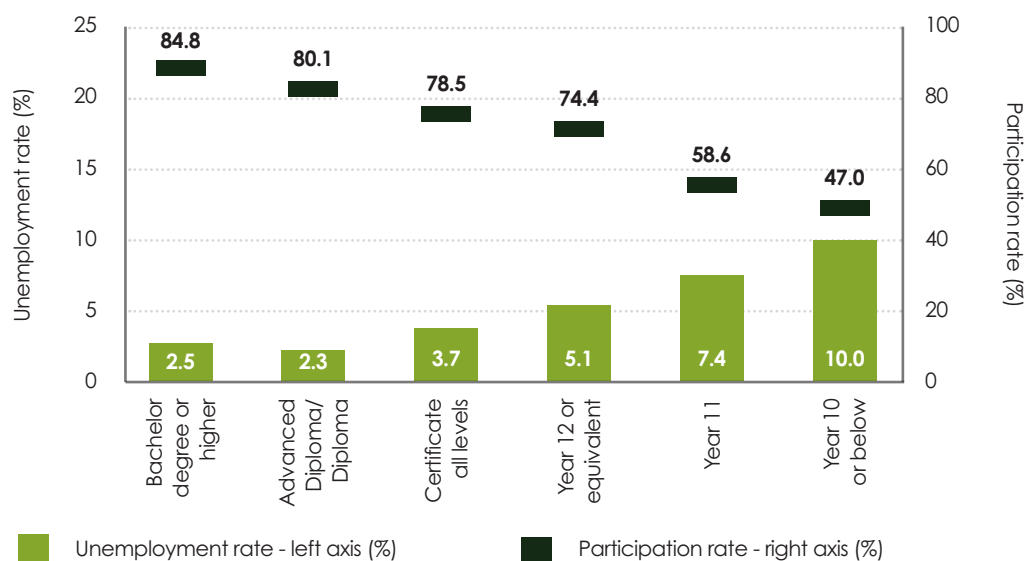
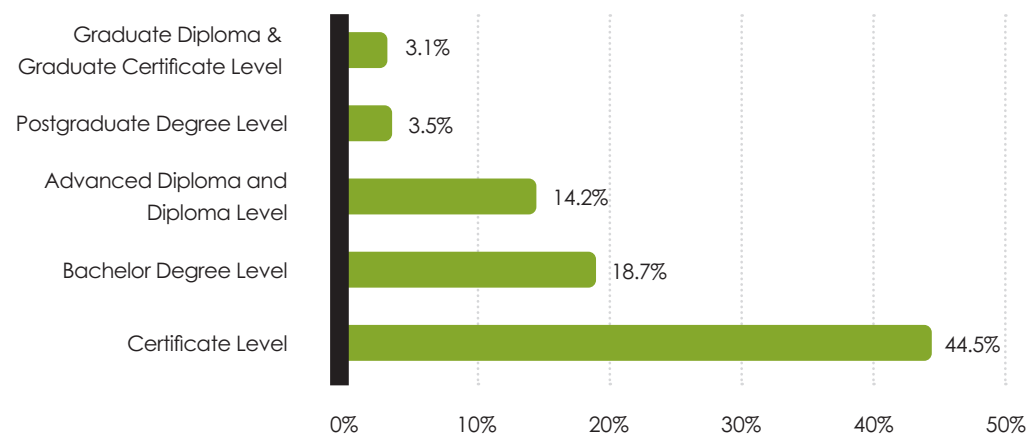


Figure 9 - Highest completed non-school qualification - South West

Source: ABS 2021 Census of Population and Housing



Strategies to support education and skills

- Link ECU's reputation in cyber security, integrating that, IT generally and TAFE training with the development of an advanced manufacturing hub.
- Create customised courses that build digital capacity on existing study, particularly for trades and meeting the needs of Industry 4.0.
- Certified training to meet care needs and employment opportunities resulting from demographic change and the ageing population.
- Blend online learning and attendance as a response to future educational demand and delivery.
- Introduce additional learning support/centres in key areas of regional growth reflecting regional student participation levels.
- Drive co-operation between industry and academia/training organisations to deliver premium training and research outcomes.
- Identify and exploit points of difference in education and training such as industry placements, internships, inter-state or overseas study exchanges for broader experiences and contra arrangements to expose students from overseas/interstate to the South West.
- Explore new ways of packaged learning as an alternative to the traditional three-year degree.
- Investigate options to share childcare services on the South West Campus to support retraining and upskilling.
- Project-based targeted training and skills development to help close the gap and provide work for Aboriginal people.
- Connect industry needs directly with tailored training.
- Adopt procurement policies to support training and Aboriginal economic engagement.



3.2.4 Sustainable (economically, environmentally and socially) communities and population

People

A sustainable population is a prerequisite for regional development, although predicating economic growth on a continually expanding population is environmentally reckless. The South West has not yet had the conversation on an ideal population size, but there remains capacity for growth and a need to plan for a regional population of 300,000 by 2050.

Population forecasting by WA Tomorrow was revised down as a result of very low migration numbers, a Covid impact that will resonate for some years. For the South West the impact is a greater number of aged persons, less aged to 14 years, and the dependency ratio will rise to 38% by 2063 (Intergenerational Report), a trend consistent with other developed nations. The regional population (206,297 in 2025) has grown steadily and at a faster rate than most of regional WA. The coastal strip remains popular with the Bunbury-Busselton axis being home to more than half of the whole region's population and accounting for about 55% of the region's workforce. The urban footprint that makes up Greater Bunbury accounts for almost 80,000 people.

All Local Government areas have grown since 2015 but experience different drivers: net overseas migration; net internal migration; and/or natural increase. The fastest growing local government is the Shire of Augusta-Margaret River followed by the Shires of Nannup, Bridgetown-Greenbushes and the City of Busselton. All areas have gained through net internal migration.

The City of Bunbury is constrained by its boundary and is impacted by the social trend to have less persons per household. The Regional Australia Institute predicts that Greater Bunbury will grow to 172,700 by 2056 and Busselton will grow to 68,500.

Inland communities, from Collie through to Manjimup, are generally more constant and reflect the nature of communities based on primary industry. These communities also feature a higher median age group.



Figure 11 Jobs in South West Sub-regions by Industry 2025

Source: ABS Census of Work and Employment (Scaled)
REMPLAN Economy 2025

Work in Bunbury Geographe

Industry Sector	Jobs	%
Health Care & Social Assistance	9,249	17.10%
Construction	6,637	12.30%
Manufacturing	5,278	9.70%
Retail Trade	5,169	9.50%
Education & Training	4,809	8.90%
Top 5 industries total	31,142	57.50%

Work in The Capes

Industry Sector	Jobs	%
Accommodation & Food Services	4,074	15.40%
Health Care & Social Assistance	3,813	14.40%
Retail Trade	3,274	12.30%
Construction	2,629	9.90%
Education & Training	2,353	8.90%
Top 5 industries total	16,143	60.90%

Work in Warren Blackwood

Industry Sector	Jobs	%
Agriculture, Forestry & Fishing	2,013	23.50%
Health Care & Social Assistance	944	11.00%
Mining	767	8.90%
Retail Trade	707	8.20%
Education & Training	689	8.00%
Top 5 industries total	5,120	59.60%

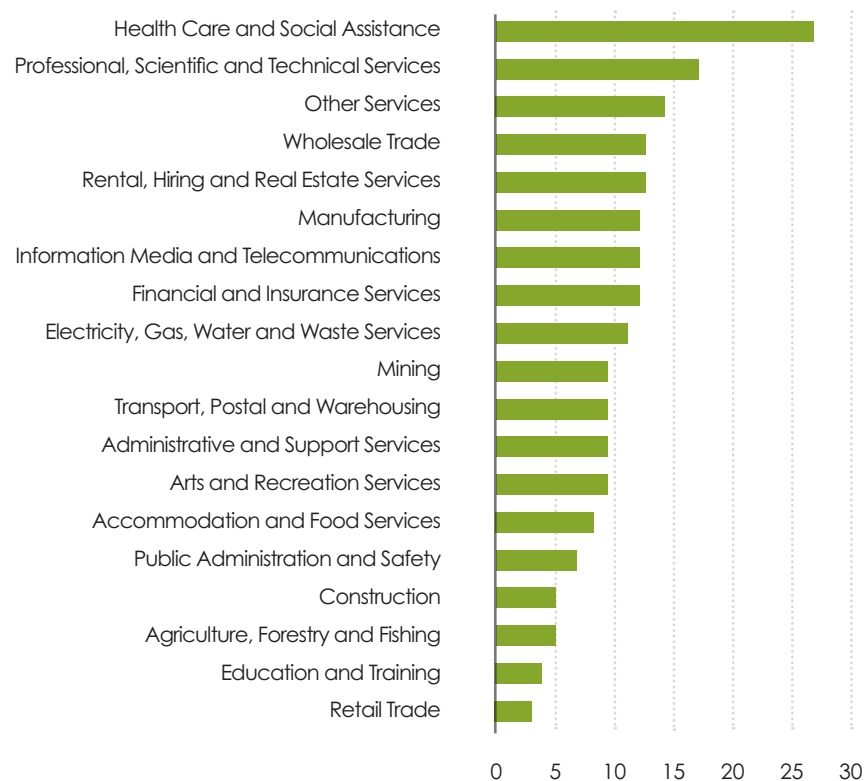


Figure 10 - Projected industry employment growth - Western Australia. 10-year growth rates 2025 - 2035

Source: Jobs and Skills Australia (2025) Employment Projections



Image by Tourism WA, Manjimup Heritage Park

Figure 12 - Regional population, 2024-25 – South West

Source: Estimated resident population and components, Local Government Areas Western Australia 2024-25

	As of June 30		Movement		Components of population change		
	2024	2025	2024-25		Natural increase	Net Migration	
	No.	No.	No.	%	No.	Domestic	Overseas
Augusta-Margaret River	19488	20170	682	3.5	75	425	182
Boyup Brook	1966	2000	34	1.7	-2	31	5
Bridgetown-Greenbushes	5812	5931	119	2.0	16	90	13
Bunbury	35349	35730	381	1.1	16	56	309
Busselton	45189	46184	995	2.2	70	657	268
Capel	19753	20171	418	2.1	129	167	122
Collie	9440	9561	121	1.3	-5	98	28
Dardanup	16005	16280	275	1.7	19	153	103
Donnybrook-Ballingup	6608	6698	90	1.4	15	46	29
Harvey	31613	32208	595	1.9	148	294	153
Manjimup	9536	9621	85	0.9	-4	38	51
Nannup	1700	1743	43	2.5	0	35	8
South West	202459	206297	3838	1.9	477	2090	1271

Demographic implications indicate a need to consider active ageing and provide more aged accommodation. Consequently, there will be training and professional opportunities in healthcare. Older residents may be less mobile and require public transport as well as putting more demand on medical services.

Figure 13 - Age Structure of the South West region relative to Western Australia - 2016, 2021, 2036

Source: ABS Census 2016 and 2021 and WAPC - WA Tomorrow Population Forecast

	2016 Census		2021 Census		2036 Estimate	
	SW	WA	SW	WA	SW	WA
0-4 years	6.3%	6.5%	5.4%	6.1%	4.8%	5.4%
5 to 14	14.0%	12.7%	13.5%	12.9%	10.7%	11.0%
15 to 19	6.2%	6.1%	5.8%	5.8%	5.6%	5.9%
20 to 24	4.6%	6.5%	4.2%	6.0%	4.6%	6.6%
25 to 34	1.3%	15.3%	10.6%	14.0%	10.5%	14.1%
35 to 44	13.1%	13.9%	12.8%	14.3%	11.7%	13.6%
45 to 54	14.1%	13.5%	13.5%	13.1%	13.3%	13.4%
55 to 64	3.4%	11.4%	13.7%	11.8%	12.3%	10.6%
65 to 74	10.3%	8.1%	12.2%	9.3%	12.7%	9.4%
75 to 84	5.0%	4.2%	6.1%	4.9%	9.7%	6.9%
85 and over	1.8%	1.7%	2.1%	1.9%	4.1%	3.2%

Image by Tourism WA, Busselton Jetty





Aboriginal people make up 2.7% (over 5,000 people) of the regional population. Noongar people are the Traditional Custodians of land stretching from Geraldton to Esperance, and there is evidence of some of the longest connections to the land and waters among all Indigenous people.

The South West connects the traditional boundaries of Wadandi, Pibulmen, Kanenag, Pindjarup and Minang dialect groups represented by Wagyl Kaip (Boyup Brook, Bridgetown, Walpole) to the East, Gnaala Karla Booja (Bunbury, Capel, Donnybrook, Balingup, Harvey, Collier and Mandurah) to the north, and Karri Karrak (South West Boojarah: Busselton, Dunsborough, Margaret River, Pemberton and Nannup) Native Title groups. It is important to note that the region's Noongar people have an exceptionally deep and enduring connection to booja (country) both physically and spiritually.

The South West Native Title Settlement is the largest Native Title settlement in Australian history and comprises six Indigenous Land Use Agreements (ILUAs) registered in 2021.

ILUAs are pushing forward and creating unprecedented opportunities for the region's Aboriginal people, with huge efforts being made to boost economic engagement through Ranger programs, commercial procurement, education/training and government projects. Other significant opportunities are in culture, knowledge and art.

Figure 14 - Change in the Region's Population 2015 to 2025 by LGA

Source: ABS Estimated Resident Population, ABS 2021 Census Population & Housing

	Estimated Resident Population 2025	Change 2015-2025		Av Annual Growth Rate 2015-25
		%	No.	%
Augusta-Margaret River (Shire)	20,170	39.9	5,751	3.4
Boyup Brook (Shire)	2,000	19.0	319	1.8
Bridgetown-Greenbushes (Shire)	5,931	25.5	1,204	2.3
Bunbury (City)	35,730	8.7	2,858	0.8
Busseton (City)	46,184	25.0	9,244	2.3
Capel (Shire)	20,171	16.9	2,921	1.6
Collie (Shire)	9,561	4.7	429	0.5
Dardanup (Shire)	16,280	14.7	2,090	1.4
Donnybrook-Balingup (Shire)	6,698	12.6	749	1.2
Harvey (Shire)	32,208	20.8	5,552	1.9
Manjimup (Shire)	9,621	2.3	219	0.2
Nannup (Shire)	1,743	28.9	391	2.6
South West Total	206,297	18.2	31,727	1.7



Image by Tourism WA,
Connection to Country, Koomal Dreaming



Sports

Regional communities are bound by sports and high rates of participation, particularly organised sport. Local competition fuels community identity, inclusiveness and a sense of belonging.

Strengthening the life skills of youth is a key objective of the United Nations 2030 Agenda for Sustainable Development which encourages social inclusion and links across race, gender and age.

While socially important, sports and recreational industries are generally under-rated as economic drivers for smaller industry sectors, community cohesion and tourism. They contribute to economic diversity and generate opportunity.

As greater value is put on personal time and interests, discretionary spending boosts sectors from golf to corporate bowls. The South West racing and pacing industry supports thoroughbred racing in Bunbury and Collie, and trotting clubs in Bridgetown, Bunbury, Busselton and Collie. Bunbury Turf Club is the region's premier facility. Bunbury enjoyed an almost \$30m upgrade which has enabled year-round training and racing in what is the leading regional facility in Western Australia. The redevelopment also saw the creation of 150 state-of-the-art horse stalls with remodelled access, and some new buildings.

As a result of the redevelopment, it is estimated that the uplift in total direct expenditure generated by training activities at Bunbury racecourse will amount to \$30.8mpa by 2028-29.

Offering unsung value to the recreational sector are community sports facilities as regional and intra-regional attractors for events that drive visitation.

The region is also home to a diverse range of motorsport facilities, including Manjimup's Cosy Creek Motorsport Complex, Bunbury Speedway, Manjimup Speedway and Margaret River Speedway and Collie Motorplex. The latter features a 2.6km circuit - the longest motorsport track in Western Australia - and hosts a growing calendar of state and national events.

The South West additionally features internationally recognised surfing coastline, highlighted by the Margaret River Pro, which contributes significantly to tourism, destination branding and community participation in coastal recreation.

Upgrades to Hands Oval saw professional AFL brought to Bunbury. The West Coast Eagles played twice in 2025 while Fremantle played in the 2026 season and there will be more Premiership football in 2027. The ground has also hosted international women's soccer.

These nationally significant events are buoyed by the City of Bunbury's focus on leveraging sport, recreation and major events to drive visitation, economic activity and regional profile.

Key State Government commitments for sport and recreation in the South West include the \$25.7m Bunbury Community Courts project (4-6 indoor courts) at Hay Park, which will deliver a major new indoor sporting facility and strengthen the

region's capacity to meet local demand and host tournaments. The South West Slammers represent the region in state level basketball, playing in Eaton.

While traditional structured sport remains popular, outdoor recreational activities have seen growth. Collie is getting noticed as an adventure tourism destination through mountain biking, trail running, water-based recreation. Associated infrastructure is creating new visitation opportunities and supporting economic diversification. At the other end of the region, Nannup has gained international attention as world championship gravel riding hosts and the region features two 1,000+km iconic routes in the form of the Munda Biddi Trail (cycling) and Bibbulmun Track (walking).

Everyday participation bridges differences in race, faith, gender and age which leads to greater social cohesion. Tracks and trails enhance liveability, provide access to nature, they educate and positively brand the South West.



Socio-Economic Indexes for Australia
(SEIFA) 2021

Source: ABS Census of Population and Housing 2021

	SEIFA
South West	991
Augusta-Margaret River	1,031
Boyup Brook	995
Bridgetown-Greenbushes	1000
Bunbury	944
Busselton	1,019
Capel	1,016
Collie	908
Dardanup	1,006
Donnybrook-Balingup	987
Harvey	998
Manjimup	959
Nannup	978



Community

Compared with the State as a whole, people in the South West are more likely to be married, own their own home, live in lower density areas and have lower levels of mortgage debt.

However, the region scores below the average based on the Socio-Economic Indexes For Areas (SEIFA) which measures relative disadvantage – employment, income levels, educational achievement and internet access. SEIFA scores have flaws but do provide a general picture, noting where interventions would be useful.

Weekly household incomes are most commonly in the \$2,000-\$3,499 range, with more than a quarter of all households falling in these statistical brackets. The figures may trend slightly higher since Census data relates to the area where the person was resident at the time ie. the region's FIFO workforce would be recorded in other area data.

Arts and cultural activities

The economic contribution of the arts is well recognised in the South West. The region features Australia's largest film prize through CinéfestOZ, Western Australia's premier country music event at Boyup Brook and a multitude of food-related events which contribute to the regional brand through promoting excellence in agricultural production.

Events drivers include Southern Forests produce, regional wines and Cabin Fever Festival among many others that include premium drinks and food as key components of mixed packages. The Capes region features Margaret River Open Studios which attracts thousands of visitors each year to experience art in many forms. There are also regional music events from the Bridgetown Blues and Boyup Brook Country Music Festival, to Busselton's Jazz by the Bay and capacity for travelling shows at the region's entertainment centres.

The region has a wealth of other cultural connections – field days, cars and medieval carnivals – that add to the richness of the community as well as the economy in providing impactful visitation triggers.

Strategies to support sustainable communities

- Promote Bunbury as Western Australia's second city to attract more investment to the region.
- Improve public transport connections, particularly supporting youth and older people.
- Work to create more inclusive communities and close the gap across education, health, housing and jobs.
- Greater acknowledgement of Traditional Custodians through wider use of signage and art to boost regional identity.
- Boost Aboriginal recognition, engaging to grow the appreciation of distinctly South West tourism offerings and common use of the Noongar six seasons.
- Make the South West, Western Australia's regional sports capital for state-wide competitions and visitation triggers.
- Continue to develop facilities supporting state level country sports – hockey, professional basketball, state cricket, soccer carnivals and other sports.
- Utilise premier sports infrastructure for training pathways to develop talented youth.
- Maintain community sports facilities to enhance regional liveability, connectedness, lifestyle, youth engagement and active ageing.
- Invest in the region's sports facilities, engaging activities with community, youth, active ageing and health.
- Continually plan ahead and get behind smaller communities to support liveability and therefore regional growth through population distribution.
- Consolidate interest in tracks/trails with a focus on managing and raising the standard of existing assets.
- Acknowledge the importance of volunteerism as a social glue.



Environment

The South West Natural Resource Management region incorporates 26 LGAs and is at the heart of the South West Botanical Province, one of only 36 biodiversity hotspots in the world, highlighting its rich diversity of flora and fauna. The NRM region also features four wetland systems of international significance recognised under the Ramsar Convention. The coastal environment is one of the South West's greatest assets in cultural, community, economic and environmental value. The Southern Forests are also of great value, noting that two-thirds of the entire region is made up of State forest, National Parks and regional parks.

The region enjoys a Mediterranean climate with hot dry summers and wet winters. The region is facing climate pressures, particularly declining rainfall and sea level rises. CSIRO's most comprehensive assessment of water yield found that the South West was one of the most water-challenged regions in Australia, noting a 15% decline in rainfall since 1975. With modelling suggesting a declining surface water yields of 24% in the next decade (CSIRO) then water issues must be considered a regional priority.

Further, the Bureau of Meteorology reports that WA temperatures have increased by 1.52°C (BoM 2024) since records began in 1910 and the Climate Commission found that local sea level rises have been the highest in Australia at 7.4mm/pa since the early 1990s, a combination of isostatic and eustatic influences. In 2010 the WA Planning Commission specified that SLR should be taken as +0.9m by 2100 while a Department of Transport's state-wide assessment highlights the South West as extremely vulnerable: Bunbury and Busselton were recently listed among the top three WA locations at "extreme" susceptibility to coastal inundation. The latest data ranges exceed 1m and does not account for storm surge.

The South West is Australia's canary in the cage, pointing to opportunities for academic research and pilot interventions in climate adaptation strategies in everything from home design and energy to bushfire and extreme weather events.

It is an increasing challenge to manage risks posed to the South West which is under pressure given that its landscapes are a drawcard that in turn requires management to save it from those who seek to experience its natural beauty.

Strategies to improve environmental outcomes

- Protect and enhance surface and groundwater resources, including wetland and waterway health.
- Increase the use of 'waste' water resources for reuse and/or aquifer recharge.
- Include aspects of green canopy and water sensitive urban design in CBD redevelopments and upgrades.
- Support carbon farming and Planet Ark's Wood Encouragement Policy to lock up carbon.
- Encourage access to forest environments to promote a greater understanding and appreciation of the region.
- Encourage weed and pest management on both public and private land.
- Protect and create habitat for the region's threatened native species.
- Future plan with coastal retreat in mind and develop local strategies for increased storm events and sea level rises.
- Consider fire risk, fuel load and thinning for healthier forests.
- Identify and mitigate against coastal erosion and inundation risks.
- Engage Traditional Custodians in environmental roles, caring for country, forests and protecting them for future generations.
- Acknowledge farmers as key land managers, encouraging regenerative practices and undertaking actions to conserve soils. Encourage consumers to consider carbon kilometres, buy local and work with seasonally available food.
- Support the circular economy, utilising waste as a resource for reuse and repurposing.
- Change thinking to first consider repair and upgrade rather than replacement.
- Always consider the impact of population growth and sprawl on the region's environment.
- Work with communities so everyone understands that healthy environments are everyone's business.



3.2.5 Collaboration

Forming the final part of the determinants of regional development are effective cross-sectoral and intergovernmental partnerships – and integrated regional planning. While collaborative approaches can ebb and flow, the South West's planning and business environments have traditionally featured strong levels of partnership.

Working together for the purpose of prioritising government investment in the region raises awareness of critical issues and creates a focus for all sides of government. The collective can present a funding rationale based on good evidence and co-operation within sectors is also a powerful tool with clusters gaining their own momentum, concentrating knowledge which aids overall business competitiveness. The South West features a strong and united timber sector, dairy industry, health and education alliances, creative sector and business unity through the region's Chambers of Commerce and Industry.

In conclusion, regional development success is not a single champion charging out ahead of the others on a trusty steed. The battle for improving the region is fought on multiple fronts by an army which operates from the same plan. The power is in the region's interest – not individual interest.

This document aims to sit as a long-term vision for the South West. It works unreservedly with, and supports, the South West Development Commission's 2025-28 three-year action agenda, sub-regional planning strategies and other pieces of work. This in itself is a valuable collaboration with multiple stakeholders involved.

Strategies to support partnerships

- Invest and engage in true collaboration to ensure shared and committed ownership of solutions.
- Create specific roundtable groups to support action agendas such as the Advanced Manufacturing and Technology Hub project.
- Local Governments align in sub-regional and regional planning to prioritise those proposals that have genuine regional reach.
- Work with Aboriginal people to help close the gap and hold informal stakeholder group meetings to share information.
- Implement a whole-of-region waste strategy for critical mass and shared benefits.
- Standardise Local Government building requirements and create cross LGA teams to share human resources and physical assets.
- Build relationships with Traditional Owners for input on projects and possible employment outcomes.
- Work at all levels, prioritising regionally and delivering locally.
- Encourage clusters and information sharing to work in the spirit of collaboration to exploit synergies for mutual gain and wider benefits.