

Department of Social Sciences

**A case study of the wildflower industry, its participants and
their perspectives on rural development and change in the
South West and Great Southern Regions of
Western Australia**

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**This thesis is presented for the Degree of
Doctor of Philosophy
of
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DECLARATION

To the best of my knowledge and belief this thesis contains no material previously published by any other person except where due acknowledgment has been made.

This thesis contains no material which has been accepted for the award of any other degree or diploma in any university.

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ABSTRACT

This thesis presents an in-depth review and analysis of the wildflower industry within the South West and Great Southern Regions of Western Australia, within the context of the social, economic and environmental changes occurring in these high amenity rural regions.

The thesis draws on questionnaire and interview data, drawn from wildflower growers, native flower and foliage pickers ('bushpickers'), wholesalers, exporters, tourism business operators and wildflower and tourism industry support officers, to present a thorough analysis of a contemporary (albeit small) rural industry. Multifunctional transition theory is applied to assist in understanding the structure and agency-related influences affecting the reasons why wildflower producers and pickers show limited interest in diversifying into tourism. The use of actor-network analysis supports this multifunctional transition assessment framework.

It is argued that the southern wildflower industry comprises a set of individuals representing a multitude of rural ideologies and expressing, at a personal agency level, varied and sometimes dichotomous perspectives in relation to how they, as producers, view productivist and non-productivist objectives in relation to their involvement in the industry.

Producer perspectives on tourism development in relation to the wildflower industry are considered, within the context of changing patterns of rural consumption and production in the study area. The thesis argues that the set of actors present in the industry during the study period (2001-2003) perceived very limited wildflower tourism opportunities for themselves, as a result of the political economy structures, local networks and endogenous factors affecting wildflower producer decision-making.

Furthermore, the study addresses the implications for the wildflower industry of changing societal and environmental values, particularly in relation to changing forest management policies in Western Australia. Decreased access to native forest for flower and foliage harvesting, as part of a broader reassessment of the ecological sustainability of forest management practices, is identified as a potentially significant factor in reducing the volume of Western Australian wildflower exports, and thus the international market presence of product from this State.

This work contributes to ongoing theoretical debates on rural change in Australia through its consideration of the structure and agency influences upon producers' decision-making, in a specific industrial context. The analytical approach adopted contributes to discussion on both the applicability of the concept of multifunctionality in rural Australia and its utility as a framework for assessing rural development trajectories.

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LIST OF ACRONYMS AND ABBREVIATIONS

ABS	Australian Bureau of Statistics
AFEC	Australian Flower Export Council (formerly Flower Export Council of Australia, or FECA)
AFPGA	Australian Flower and Protea Growers Association
AHECC	Australian Harmonized Export Commodity Classification
ANCA	Australian Nature Conservation Agency
BGPA	Botanic Gardens and Parks Authority
CALM	Department of Conservation and Land Management. [Now known as Department of Environment and Conservation (DEC)]
CAP	Centre for Australian Plants
CRC	Cooperative Research Centre
DEC	Department of Environment and Conservation
DAFWA	Department of Agriculture and Food Western Australia
DAWA	Department of Agriculture Western Australia. [Now known as Department of Agriculture and Food Western Australia (DAFWA)]
DEWHA	Department of Environment, Water, Heritage and the Arts
DLGRD	Department of Local Government and Regional Development
EPBC Act	Environmental Protection and Biodiversity Conservation Act 1999
EU-CAP	European Union - Common Agricultural Policy
FECA	Flower Export Council of Australia
FMP	Forest Management Plan
Flowerswest	Flower Producers of Western Australia Incorporated
GSDC	Great Southern Development Commission
IBRA	Interim Biogeographic Regionalisation for Australia
ISO	Industry Support Officer
KPBG	Kings Park and Botanic Gardens
PBR	Plant Breeder's Right
p/np	Productivism/non-productivism or productivist/non-productivist (spectrum)
QA	Quality Assurance
R&D	Research and Development
RIRDC	Rural Industries Research and Development Corporation
RDC	Regional Development Commission
RFA	Regional Forest Agreement
RSE	Relative Standard Error
SWDC	South West Development Commission
WA	Western Australia
WAFEX	WAFEX (A private flower exporting company)
WAFIAC	Western Australian Flora Industry Advisory Committee
WAPGA	Western Australian Protea Growers Association
WATC	Western Australian Tourism Commission

CHAPTER ONE – INTRODUCTION

1.0 OVERVIEW

The second half of the twentieth century witnessed significant social and economic changes that affected rural development trajectories in the western world. Many rural regions of Western Australia experienced developmental pressures associated with forestry, agriculture, tourism (and other rural consumption-based activities) and mining, resulting in changes to the structure and functioning of local communities and regional activities. Consequently, new industries and lifestyle choices have emerged which, in turn, have fostered, and continue to foster, further social and economic change. Lifestyle and tourism-based industries have grown in economic importance and geographic extent as well as in local social acceptance, creating opportunities and challenges for existing and future rural and regional development. Global as well as local stimuli, including political changes and economic restructuring, have exerted varying degrees of influence over existing social and geographic systems and structures (Napton *et al.* 1999). Local (or farm) level, endogenous factors have simultaneously influenced rural change, with implications for production and consumption within the rural environment.

This thesis examines the wildflower industry in the South West and Great Southern Regions of Western Australia within a rural change framework, and addresses the influences of structure and agency upon local decisions and regional-scale outcomes. Three distinct discourses are presented. Firstly, it is argued that the wildflower industry in southern Western Australia comprises a set of individuals with predominantly production (farming) backgrounds and an inherent tendency towards productivism, with both personal agency and responses to structural factors influencing the situatedness of the producers within the ‘multifunctionality spectrum’ described by Wilson (2007). Secondly, the relationship of the wildflower industry to tourism is discussed. After considering the actor-networks demonstrated through the empirical research, and the structure-agency relationships depicted through the actor-network and multifunctionality assessment frameworks, it is contended that wildflower tourism opportunities in the study area are limited for the set of actors present during the study period.

Thirdly, this work addresses changing forest management policy in Western Australia and the implications of this for the wildflower industry. Forest policies, driven by similar consumption and environmental values to those influencing other aspects of rural change in the study area, are considered in relation to their impacts upon wildflower exports and industry development.

Political economy (structure) and personal networks and influences upon decision-making (agency) are considered at the individual producer level. The research draws on empirical data obtained from three years' (2001-2003) of intensive study of the industry, which incorporated a range of activities including interviews and surveys with actors from multiple sectors in the industry.

The value of this study emanates from the gathering of empirical rural change data in Australia (which has been identified as being in short supply – Tonts (1998)) and utilising this data to do two distinct things –

- 1) to contribute to wildflower industry development discourse within in the study region; and
- 2) to provide further empirical research data to inform real and practical scenarios which contribute to the ongoing dialogue on the multifunctional transition in rural Australia.

As a case study of rural change, this research analyses the emergence of the wildflower industry in the southern parts of Western Australia from a perspective that takes into account a multitude of influences upon rural life in the developed world. It reports on the intensive study of the players in the native flower and foliage industry, and of how those players act and relate within a changing society. Global pressures, local production systems, historical knowledge and non-rural influences are but a few of the factors affecting the ongoing development and changing structure of those rural communities where the native flower and foliage industries are developing.

In relation to the South West and Great Southern Regions of Western Australia, as for many scenic rural areas throughout the developed world, the twenty-first century poses opportunities and challenges to existing social and economic structures and relationships. Changes in global consumption trends and trade patterns are affecting production systems upon which many of the traditionally rural communities

of these regions rely. Micro-level activity within farms, communities, towns, businesses and production chains responds accordingly.

Understanding the personal or agency responses to changing structures in globalised or exporting rural industries by producers requires critical analysis of the myriad of relationships and networks, communication trajectories, goals, pursuits and motivations of the players who live, work and function within these social entities. Human relationships with the land and natural environs fall within the broad range of factors that need to be considered in order to understand the changes occurring in rural and regional Australia. Identifying and describing linkages among phenomena which may impact upon individuals' actions necessitates a thorough investigation of those influences upon the individuals which then contribute to inevitable social change.

1.1 AIM AND OBJECTIVES

The aim of this thesis is present a major review and assessment of the factors affecting the development of the wildflower industry in the South West and Great Southern Regions, within the context of the broader regional processes of economic restructuring and social change. Achieving this aim has involved a thorough investigation of the motivations, aspirations and goals of wildflower producers in order to analyse the impacts of change upon production systems, individuals, businesses and local economies, and to document how these are changing.

The analysis thus considers local factors in relation to global processes – that is, how the local and global interact to bring about particular social and economic configurations at the individual level.

This study is not about “wildflowers” *per se*, but about processes of adaptation within rural regions, and the ability of individuals within these regions to ride the waves of change. It investigates the influence of wider cultural and social values upon the success of new industries, and seeks to understand the influence of global (macro-level) and non-rural forces upon rural industry trajectories.

Four objectives provide a framework for the research program:

OBJECTIVE (i): To investigate the economic, social and demographic factors and cultural values that influence trends in the wildflower industry in the South West and Great Southern Regions of Western Australia.

OBJECTIVE (ii): To examine lifestyle issues and the backgrounds, motivations and aspirations of both recent entrants and established growers in the wildflower industry, at a local scale.

OBJECTIVE (iii): To examine existing and potential linkages between the wildflower industry and potentially complementary industries, such as tourism.

OBJECTIVE (iv): To utilise the lessons resulting from the addressing of the first three objectives to recommend strategies to strengthen the wildflower industry within the regional economy, with a particular focus on any emerging tourism opportunities.

The objectives were developed in consultation with the “industry partners” who provided financial and intellectual support to this research program. The South West Development Commission (SWDC) and the Department of Agriculture Western Australia (DAWA) each provided support and assistance (see Section 1.5).

A multiplicity of expectations from the industry partners resulted in the broad scope of this research program, which was tailored over time to ensure that their needs were met, while ensuring the doctoral research program was manageable in scale.

1.2 THESIS STRUCTURE AND ORGANISATION

The remainder of this chapter provides a guide to the organisation and structure of the thesis and the background to the development of the research topic. An overview of the study area is followed by contextual discussion on the emergence of the research topic and an overview of the framework within which it is analysed. A discourse on the role of the ‘industry partners’ in the research program, the use of the results obtained and the opportunities for the integration of these results into current policy and development practice are also presented in this introductory chapter.

Chapter Two provides the theoretical underpinnings of the research, and reviews the current theoretical literature on rural change. It draws on literature that links global theories with local or micro-level trends in order to provide a theoretical

context within which the wildflower and rural tourism industries in south-Western Australia can be reviewed and considered.

The research methodology presented in Chapter Three describes multi-method approaches in order to obtain a broad perspective on the complexities of the industry and its participants.

An overview of the study area and the wildflower industry in Western Australia follows in Chapter Four. This reviews existing industry information, and provides relevant statistics. Available data are presented at global, domestic and regional scales. Chapter Four also describes producer segmentation within the wildflower industry (that is, the divide between growers and 'bushpickers') and how their differing production and harvesting systems affect their roles and positions within the industry. This material provides a context for the presentation of the research results in Chapter Five.

Chapter Five presents data from surveys and interviews undertaken with growers, bushpickers, wildflower industry support officers, tourism operators and tourism industry support officers related to the wildflower and tourism industries in the study area.

Chapter Six discusses the data contained in Chapter Five, addressing both political economy and structure-related issues, and producer agency implications within the wildflower industry. An actor-network analytical approach assists in this process, focusing on producer relationships with various endogenous and exogenous actors within producer networks.

Chapter Seven utilises the empirical data presented in Chapter Five and the discussion from Chapter Six to consider the influences, motivations and aspirations of wildflower industry participants. This includes the influence of lifestyle issues and factors upon decisions to enter and/or remain in the wildflower industry. In addition it addresses the relationships between these factors, the depth of involvement in the industry, and participants' perceptions of wildflower-related tourism opportunities. Specific reference is made to the multifunctional (rural) transition, and its conceptual suitability for a study of the wildflower industry. A multifunctionality assessment framework is utilised to assist in understanding the position of the various producers within the industry.

Chapter Eight considers the relationship between the situatedness of producers along the multifunctionality spectrum and their general disinterest in entering into tourism activity. Chapter Eight also draws upon data gained from tourism industry operators to inform this discussion.

This chapter also includes reflections on changing forest policy and its implications for wildflower and tourism industry development in the South West and Great Southern Regions. It is argued that consumption-based drivers for tourism, and societal environmental pressure relating to forest management, have significant implications for both industries.

Chapter Nine uses the knowledge gained from the research program to identify and make recommendations on the opportunities for industry development. This relates to the research expectations and requirements of the program industry partners.

Concluding comments are provided in Chapter Ten, encompassing the theoretical implications of the research.

A post-script, outlining industry changes since the completion of the data collection, is presented after the thesis conclusion.

Appendices follow, including a summary of tourism and wildflower industry support organisations consulted during this study (Appendix A), three questionnaires distributed during the research period (Appendices B, C, D).

1.3 STUDY AREA

The area of reference for the research program comprised the Western Australia's South West and Great Southern Regions, which were formally established under the Regional Development Commission Act of 1993 (Houghton 2002) as 'economic development regions', served by the South West and Great Southern Development Commissions respectively. Figure 1.1 provides a map of the study area. Further detail and contextual information relating to the study area can be found in Section 4.1.

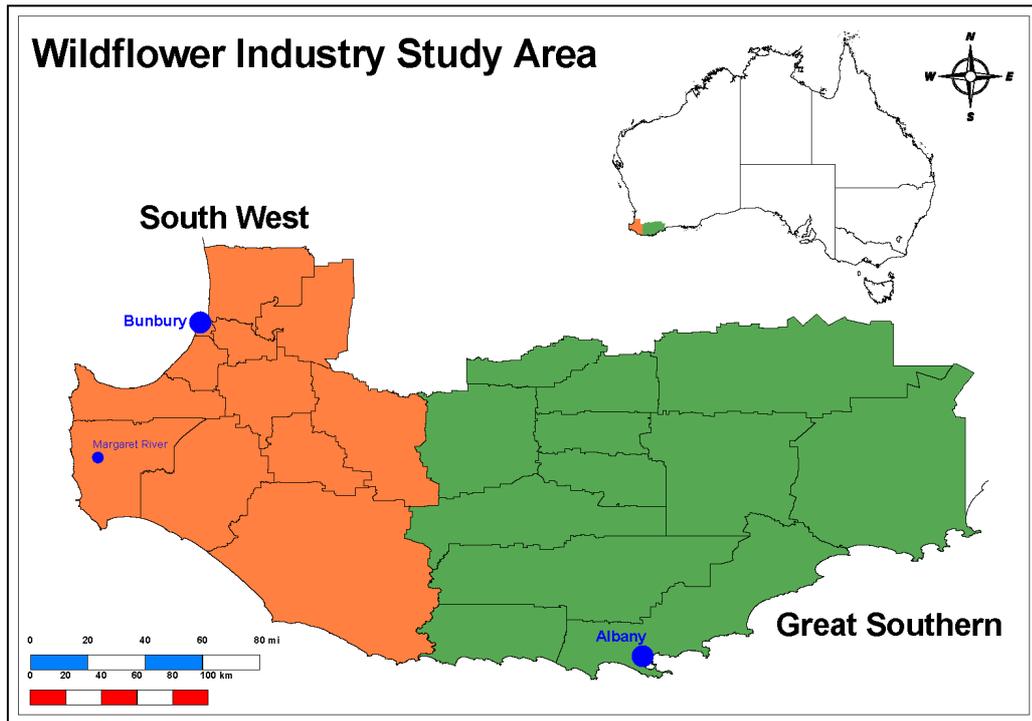


Figure 1.1 Wildflower Industry Study Area

(Source: Department of Agriculture 2003)

1.4 CONTEXT AND FRAMEWORK FOR ANALYSIS

The discussion and analysis of the southern wildflower industry is undertaken within the context of rural change and the intellectual framework of multifunctional transition theory.

The wildflower industry was selected because it was identified as having the potential to provide insight into the psyche of an industry that comprises a broad cross-section of workers with differing interests and from both rural and non-rural backgrounds. The industry includes a mixed set of participants, ranging from established farmers diversifying from traditional industries (reflecting rural restructuring in response to global influences), to new participants with limited capital. There was also, at the outset, an assumption that there would be an element of ‘sea change’ (urban to rural migration driven by lifestyle desires and the rural idyll) within the demographics of the industry. This assumption included the involvement of wealthy, lifestyle-motivated participants with funds to invest and time to spare. The assumption was based on the apparent appeal of the industry (like

that of viticulture, where the 'sea change' phenomenon was highly apparent in the study area) as a lifestyle-based option for rural income generation. This was soon disproved, resulting in a redirecting of the focus on the wildflower industry through an agricultural change lens, as opposed to a rural idyllic one.

Based on the assumptions about the broad cross-section of industry participants, the wildflower industry was seen as an appropriate case study for examining processes of socio-economic change in rural areas. The case study would enable analysis of the influence of lifestyle factors, local economic adaptation and macro economic forces on rural activity. Utilising actor-network theory to support a multifunctionality assessment framework provided a useful theoretical approach to the research program. The political economy of the wildflower industry is also addressed within this multi-faceted analysis.

1.5 INDUSTRY PARTNERS AND THE APPLICATION OF RESULTS

This research was funded in part by the South West Development Commission (SWDC) and the Department of Agriculture Western Australia (DAWA), in conjunction with an Australian Research Council grant for industry-linked research. Informal support was also provided throughout this program by the Western Australian Department of Conservation and Land Management (CALM), and the Great Southern Development Commission (GSDC).

REGIONAL DEVELOPMENT COMMISSIONS

The SWDC and GSDC are Regional Development Commissions (RDCs), established as "independent State Government agencies whose aim is to improve and promote the development of the [respective] regions" (Department of Commerce and Trade 1998). The activities of the Commissions are guided by Boards appointed by the relevant Minister for Regional Development. The objectives of RDCs are listed below:

- To maximise job creation for people working in regional WA;
- To develop and broaden each region's economic base;
- To identify and promote infrastructure services provision to enhance economic and social development;

- To identify and encourage regional investment opportunities;
- To provide information and advice to enhance business development;
- To seek to ensure that regional government services are comparable to the metropolitan area; and
- To facilitate co-ordination between relevant agencies aimed at economic and social development outcomes.

(Department of Commerce and Trade 1998)

It is within the scope of these objectives that the South West Development Commission provided direct and in-kind project funding and support to this research program. The objectives listed above also provided the regional development context within which this research was undertaken. Given the emergence of national and local synergies between viticulture and tourism (Carlsen and Dowling 1998; Dowling 1998; Department of Training and Employment 1999a, 1999b; Beames 2003), the SWDC, as a major partner, was interested in the potential to develop the relationship between wildflowers and rural tourism. The SWDC thus sought to understand where there may be economic opportunities or barriers to synergies between these industries, within the context of its objectives as listed in Table 1.1.

The role of DAWA in sponsoring this research was two-fold. Firstly, the Department approached and contributed funding and support to this research through its (former) Sustainable Rural Development Program, with the intention of securing insights into the social fabric of this emerging industry. Identifying possibilities for future rural development based upon industries suited to the geography and climate of the region was an additional desired outcome for DAWA.

The floriculture project within the DAWA's Horticulture Program further sought to obtain information on the demographics of wildflower industry participants to assist with the implementation of industry extension activities. Concern was expressed from within DAWA that some wildflower growers were not utilising the advice of the Department, particularly in relation to growers becoming more professional in their

approach to the management of their wildflower businesses. Departmental officers were keen to know if and why this was the case.

1.6 THE SEARCH FOR KNOWLEDGE

In a review of research relating to rural communities and rural social issues, a team of Western Australian researchers (Black et al. 2000) made a number of recommendations highlighting the need for improved knowledge of agricultural systems and mechanisms of adaptation to change in rural areas. These recommendations included, but were not limited to, the following:

Recommendation 6 [Structural adjustment]: “Studies of the strategies adopted by farmers or rural businesses that have successfully diversified, engaged in niche marketing or value adding would be instructive. Such research should include an examination both of the benefits and of the risks associated with such strategies, and a consideration of the extent to which similar strategies could be successfully applied elsewhere.

Recommendation 9 [Impact of regional development processes and policy]: “Research is needed to answer questions on regional development such as the following:

... What social factors (or interactions between social factors and economic and biophysical factors) might account for differing levels of performance in regions with similar economic and/or biophysical fundamentals?”

Recommendation 14 [Small towns]: “There is a need for research on processes of structural adjustment in country towns and rural communities. Issues needing to be examined include

- Revitalisation strategies
- Diversification strategies
- Factors influencing the likelihood that local initiatives can arrest or reverse processes of population decline
- Outcomes of government policies and programs designed to facilitate structural adjustment
- Efficiency and equity considerations associated with structural adjustment processes.” (Black *et al.* 2000: x-xi).

This case study addresses a number of these issues reflected by Black et al (2000). In particular, the study considers the implications of the responses of individual participants to internal and external stimuli upon broader industry and region-wide development trajectories.

This thesis adds value to current knowledge by critically analysing, in a regional context, the positioning of an agricultural industry within broader economic, social and personal frameworks. This work contributes to ongoing debate on the multifunctional transition in Australian agriculture and rural areas by researchers including Holmes (Holmes 2002; 2006), Cocklin and Dibden (2005; 2009), Cocklin *et al* (2006), and Wilson (2001; 2007; 2008a; 2008b). Furthermore, the applied nature of this research program, and the interest of the industry partners, encourages practical outcomes, as well as theoretical ones, for ongoing rural development policies and programs in the South West and Great Southern Regions of Western Australia.

CHAPTER TWO – THEORETICAL PERSPECTIVES

2.0 CHAPTER OVERVIEW

This chapter provides a review of the rural change and rural tourism literature relevant to the circumstances of the wildflower industry in the South West and Great Southern Regions of Western Australia. The research program and the resulting information presented here are based on the premise that change affecting rural areas within Australia is occurring on local, regional and global scales, and is not limited to rural and human entities only. That is, non-rural events, situations, entities and actors influence the rural world in a variety of ways, many of which are explored within this thesis in relation to the development of the wildflower industry. In turn, these entities will influence the readiness and/or willingness of industry participants to engage in new (for example, tourism-related) initiatives.

The review commences with a discussion of the theoretical underpinnings ('contextual influences') of the research undertaken, followed by consideration of relevant methodological frameworks – focusing on political economy and actor-network theories. Following this, contemporary rural research deemed relevant to the study is presented – with specific reference to rural change at global, national and regional levels, and to rural tourism at national and regional levels. Consideration of the utility of multifunctional rural transition theory within this study is presented in Section 2.3.4, and informs the analysis provided later in Chapter Seven.

The intention of this chapter is to present a framework within which change in rural south-western Australia can be adequately discussed and analysed. It should be noted that relevant information from literature relating specifically to the wildflower industry in Western Australia is presented in Chapter Four.

2.1 CONTEXTUAL INFLUENCES

This research program draws on a number of philosophical perspectives. Predominantly, the research adopted Marxist-inspired approaches (Panelli 2006; Perkins 2006), largely as a result of the need to consider agricultural restructuring within a context of globalisation. These underpinnings contribute to structural

explanations of the relationships between society and economy, and to the political economy analysis of the drivers of rural change.

Actor-network theory integrated with political-economy analyses frame the analytical approach taken in this research project. (Refer to Section 2.2 for further discussion on political-economy and actor-network frameworks). Multifunctional transition theory is then utilised (see Section 2.3.4) to assist with the analysis of the implications of personal motivations and perspectives upon industry development. This approach allows for the integration of a structural analysis with one based on the agency of individuals within the industry.

In addition to the structuralist perspective outlined above, humanistic approaches have affected the context for this research. Based on hermeneutics (or interpretation), humanistic geography takes the stance that human experience is fundamental to understanding (see Graham 1997; Panelli 2006). Cloke, Philo and Sadler (1991) have noted that humanistic research considers the humanity of the *geographer*, as well as the humanity of the people studied. Consequently, the perspective of the researcher can be, and is, influential on the findings. With this in mind, humanistic reflection has been included in the thesis.

The philosophical influences, however, do not end there. This study includes some elements of postmodern theory and practice (Graham 1997; Panelli 2006), as a result of the need for this researcher to understand the influences on changing rural society in a popular corner of a wealthy developed nation. Cloke, Crang and Goodwin describe postmodernism as “an adjective used to describe social and cultural forms that eschew ‘modern’ qualities of order, rationality and progress in favour of ‘postmodern’ qualities of difference” (Cloke *et al.* 2005: 609). However, the same authors also note the difficulty involved in defining the concept, as do others such as Murdoch and Pratt (1993). In the context of rural change, postmodern influences relate to the conservation and consumption of rural environments and lifestyles (Panelli 2006), which include modern perceptions of the rural idyll (see Section 2.3.2).

Graham (1997) states a key benefit of postmodern research is that it “allows for multiple voices” and provides researchers with “ways of ‘reading social relationships and their human geographies and favours minor theories over the totalising metanarratives of modernism” (Graham 1997: 609) . In analysing the information and situations presented by the heterogeneous individuals who constitute the

wildflower industry in the study area, postmodern considerations offer many analytical opportunities.

Postmodern perspectives on change are therefore considered throughout the study, although this is undertaken alongside the political economy and actor-network analyses. This is reflected through the multifunctional transition discourse, whereby the consumption and environmental values affecting rural change are considered in relation to the multifunctionality traits and trends exhibited by producers.

Elements of post-structuralism, related to post-modernism, are also drawn upon in this thesis, and thus this concept also requires a brief introduction. Post-structuralism questions the basis on which society has been structured – including, and contrary to political economy analyses, in relation to the existence of class within societies. Lockie asserts that:

Where a structural Marxist perspective might argue that culture is a reflection of the economic structure of a society (its 'mode of production'), poststructuralist perspectives suggest that both the relations of production and the beliefs people have about these relations are very much up for grabs. Power is not viewed in poststructuralist sociology as a one-way, hierarchical concept, but as one which is continually challenged and negotiated. (Lockie 2001: 27).

Phillips (2002) argues that post-structuralism and political economy (with its roots in Marxism) are not necessarily in antithesis, and that lines of interconnectedness between the two philosophies should be considered. The two concepts, Phillips posits, have some congruency. Issues of power and class within the wildflower industry, within both political economy and post-structuralist frameworks, form part of the actor-network analysis presented in this study.

Utilising this combination of these philosophical underpinnings is essential to developing a broad understanding of the influences upon, and within, the wildflower industry in southern Western Australia. These affect the ongoing status of the industry. The utility of the varied approaches is summarised below:

Marxism – enables description and analysis of political economies of the wildflower industry, and permits linkages to non-human influences (via political economy and actor-network theories). Marxist-based analyses

provide the opportunity for the consideration of 'class' in order to comment on the impact of class on the development opportunities for the industry.

Humanism – fundamental to understanding the motivations of the human actors in the wildflower industry. Humanism acknowledges that purely positivist approaches will not provide answers to questions of anthropocentric motivations and influences.

Post-modernism/post-structuralism – permits understanding of post-modern influences affecting actors and their networks in the wildflower industry, and their motivations in relation to both production and consumption. Post-modernist approaches also ensure that multiple voices both in and affecting the wildflower industry 'are heard'.

This multiple-philosophy contextual basis is partly due to the broad nature of the research question (including the research requirements of the industry partners investing in the research). It is argued that the application of any of these philosophies, in isolation, would not have produced the understandings of the industry which were required in order to address the research partners' expectations. Consequently, different segments of the study have required differing approaches. Actor-network theory provides one means of integrating the structural and post-structural approaches to understanding the wildflower industry and its participants.

The multiple-philosophy approach also emerged as a result of working *inductively* (Gilg 1985) throughout the research program. The study was conducted inductively (that is, in a theory-generating manner rather than a theory-testing one) to permit flexibility according to the needs of the participants and the ongoing analyses undertaken during the research phase.

2.2 POLITICAL ECONOMIES AND ACTOR-NETWORKS

Within this Marxist-based setting, political economy and actor-network analytical approaches provide a means for considering the broader contexts in which entities act.

POLITICAL ECONOMY STUDIES

Political economy studies consider

the relations of production, distribution and capital accumulation, the efficacy of political arrangements for the regulation of the economy, and the impact of economically determined relations on social, economic and geographical formations" (Woods 2005: 22).

Commodity chains, which demonstrate the flow of resources and products through the cycle of production, marketing and consumption, often form the basis of political economy studies.

Analyses of agriculture, class, rural change, and 'the state' are all undertaken within this mode of research (Cloke and Little 1990; Woods 2005), with the purpose of helping us to understand:

- (i) the way the organisation of the economy produces particular forms of investment (and disinvestment) in rural areas;
- (ii) the variety of social groups, their interests in land, property and the environment, and the interaction between social groups and economic processes;
- (iii) the way in which, and the reasons why, the state operates as it does in response to, or as an initiator of, economic reorganisation. (Healey 1984, cited in Cloke and Little 1990: 4).

Political economy approaches utilise hermeneutics to focus on interpretations of the research object (Graham 1997). It has been noted that "in contemporary geography the term 'political economy' is applied to studies that are influenced by Marxist theories, particularly those with an emphasis on the social characteristics of capitalist societies, and the imperative of capital accumulation." (Woods 2005: 22).

In the context of researching the wildflower industry, political economy studies enable some insights to be made into varying structural influences upon decisions made by industry participants. However, as noted by Woods, complexities arise when endeavouring to understand specifically rural activities:

The complex web of actors involved in agricultural decision-making therefore means that any account of agricultural change... necessarily glosses over the detailed dynamics, discrepancies and discontinuities that form the reality of agricultural change as experienced on the ground. Moreover, a focus purely on agriculture artificially separates farming from the wider rural economy and the changes in other sectors. (Woods 2005: 60).

Furthermore, Murdoch suggests that political economy assessments have shown that commodity chains “tend to be orchestrated by multi-nationals and other ‘macro’ actors” (Murdoch 2000: 410). Closer understanding of the localised specificities affecting producers requires more complex analyses of the factors influencing producer decision-making. Marsden (1990) also identifies the need to improve on political economy analyses – or for “going beyond arguments about the articulation of modes of production... and focusing on the variable sets of interactions which occur between external capitals, farm households and labour processes” (Marsden 1990: 381). This, notes Marsden, is particularly so in relation to farms engaging in pluriactivity (which this thesis will argue is occurring within the wildflower industry).

On this basis, the opportunity for utilising actor-network theory for more thorough understandings of aspects of the rural world, and for complementing commodity chain or political economy analyses emerges. This can add value to political economy approaches which often focus solely on power relations and may disregard natural and social influences in commodity production (Murdoch 2000). The actor-network concept is explored below, and has been applied in the research program to enable more comprehensive understanding of the multiple dimensions of rural agency and change.

ACTOR-NETWORK THEORY

The study of networks is significant when investigating change in rural societies (Panelli 2006). Network approaches, according to Panelli, characteristically study “how networks (including political and social ones) are mobilised in rural societies, [and how] communities or economic sectors are reorganised” (2006: 80). Actor-network theory is one appropriate approach. The central tenet of actor-network theory is

that in order to achieve their intended outcomes, entities have to enrol other actors into a program which places the initiating entity as a representative of

the whole network and its objective as representative of the interests of each of the actors. ...Hence, an actor-network approach tells 'stories'. (Woods 1997: 322).

Those 'stories' may involve human *and* non-human actors (Jones 2006), and encapsulate horizontal as well as vertical relationships in the storytelling. In relation to the wildflower industry study, actor-network analysis provides an opportunity to consider the industry development outcomes of influences, decisions and actions at the scale of local producers (the horizontal), in addition to the commercial relationships and commodity chains in which they operate (the vertical).

Murdoch describes horizontal networking as a spatial approach which "implies an attempt to coordinate a range of activities located within an area so that the capacity of local actors to gain access to markets and to other economic opportunities is heightened" (2000: 412). In this context, the applicability of this analytical approach to the case study of the wildflower industry becomes apparent. Drawing upon actor-network theories enables the analysis of the associations (and sometimes the politics) underpinning change and reorganisation in rural societies (Panelli 2006). It is herein that the value of actor-networks can be added to the traditional vertical network assessments of political economy and commodity chain approaches. A broader picture of rural change and development can then be constructed.

"As sets of relations that can straddle diverse spaces, networks hold the promise of a more complex appreciation of 'development' than has traditionally been evident in state-centred versus market-led or endogenous versus exogenous models." (Murdoch 2000: 408). Murdoch indicates that this may be leading to a new paradigm of rural development, within a broader context of "a more wholesale shift in understandings of modern economic and social life" (2000: 408).

As Murdoch (1995) notes, the study of networks is not new. The benefit of this approach, however, lies in the more recent challenge of network *analysis*, which enables the onlooker (or even the actors themselves) to (better) understand the spheres in which these actors operate. While often used in analyses of rural conflict (see Woods 1997 for examples), actor-network analysis provides opportunities to understand the development of the wildflower industry within the contexts of rural change and transition. By considering the position of producers within horizontal networks, issues of "flexibility, trust and diversity", as discussed by Murdoch (2000),

can be considered, particularly in relation to the abilities of producers to adapt and innovate.

The framework offered by actor-network theory allows for the integration of the 'micro' and the 'macro', and of agency and structure, in a non-reductionist fashion (Murdoch 1995). Murdoch argues that "economists and sociologists should try to restrict their explanations to that which can be supported by description, and that descriptions should emanate from studies of network construction" (2000: 734). Opportunities arising from network analysis lie, he argues, in the understanding of 'what is going on inside networks' which influences the construction and maintenance of power relations. It is in this respect that class relations and their impact on wildflower industry change and their development can be discussed and evaluated.

This flexibility to analyse agency and structure on a broad number of levels provides the actor-network approach with strength in understanding 'other stories' which may be occurring within a network, affecting, or being affected by, any actor within the network. The appeal of this flexibility, and of its promise of a comprehensive understanding of the position of an actor within the wildflower industry in its many forms, has made this approach an appropriate one to utilise in this research program.

Murdoch surmises that, although networks don't provide "the answer" to rural development problems, they can show how new opportunities might be created by re-thinking traditional approaches – although specific problems will still need to be addressed "within their proper economic and political contexts" (2000: 417). Network analysis, Murdoch (2000) argues, permits the linkage of exogenous issues affecting rural development (such as those within political economy factors) with internal issues, specific to local areas and producers.

Murdoch (2006) concludes that

...despite [a] seemingly generalised shift in the contemporary countryside, the emergence of 'network society' is spatially uneven. It varies in line with levels of accessibility (or, alternatively, 'peripherality'), with the structure of the local environment, the makeup of the local society, and so forth. These features combine in different ways in different spatial contexts. We thus witness the emergence of a 'differentiated countryside' in which discrete rural

regions develop along quite distinct trajectories of change. These trajectories are determined both by the mixture of networks found in rural locations and the processes of coordination and competition that take place within these network mixtures. (Murdoch 2006: 181).

Pertinent to the wildflower industry is the concept that non-humans have a role to play within rural actor-networks. As Jones (2006: 186) notes, “we share the world with a veritable panoply of things and organisms which are all active players in ordinary ongoing everyday constitution of rural space and places.” Jones suggests that rural sociologists need to take into account the “more-than-social” world - the non-human presences and processes acting in relation to the social. The linkages between social forms and practices, and natural entities, need to be taken into account – particularly in cases such as the wildflower industry. According to Murdoch, actor-network theory “investigates how social arrangements are integrated with technological and natural processes.” Murdoch (2003: 264).

Jones describes the combinations of human and non-human relationships in the rural sphere as fluid, and links this to concepts of hybridity (see Whatmore 1999; Cloke 2003; Murdoch 2003; Jones 2006). Hybridity, these authors note, reflects that the countryside is ‘more than human’, a term expressed by Whatmore (1999) but cited widely due to its simplicity in describing the situation that confronts rural studies. Hybridity relates to the point where the human and the non-human meet (Murdoch 2003). The concept infers that the social (the human) and the non-human interact – however, the outcome is complex if ‘rural’ is considered to be a social phenomenon. Conceptually, if the interagency between the human and the non-human redefines the social, then rural cannot simply be seen as a social construct (see Murdoch 2003).

Murdoch notes that “any analysis of rural change [which utilises a hybrid perspective] must adopt an ‘agnostic’ attitude towards different types of actors and entities and must keep an open mind about which are likely to prevail in any given circumstance” (Murdoch 2003: 265). He further argues that hybridity which incorporates human and non-human actors (such as nature and technology), is fundamental to actor-network analysis, and that actors are themselves hybridised with networks. “The discourse of hybridity... is a response to this ‘mixing up’ of things and people in rural processes and events”, as evidenced through theoretical approaches such as actor-network theory (Murdoch 2003: 279). Jones (2006)

likewise views the world as intensely hybrid, but warns that entities are not always formed by the networks within which they lie.

An outcome of Murdoch's (2003) hybridity discourse is a call for the tolerance of pluralism in rural studies – that is, to include hybridised actors and networks in order to consider any uncertainties that lie between humanistic and naturalistic approaches to the rural. As Murdoch summarises,

...while any particular vision of the countryside will continue to focus upon social forms, natural entities or even hybrid objects, it will also need to be aware of the interrelationships that exist between these realms if it is to capture the full range of processes currently running through rural areas. ... Given that this complexity is likely to increase in the future as social, technological and natural systems come into even closer contact ... then it is incumbent upon us to find ways of investigating the countryside that are capable of reflecting its elaborate and manifold character. (Murdoch 2003: 280).

It is on this basis, and with this insight, that the wildflower industry research program is described and analysed within this thesis. The warning provided by Lockie and Kitto (2000) to avoid the 'black box' that is 'consumption' within actor-network analyses, is also heeded.

2.3 CONTEMPORARY RESEARCH IN RURAL STUDIES

The remainder of this chapter deals with specific concepts in relation to changing rural systems in developed nations. Following an argument to *not* define the rural, the section presents a consideration of the influence of 'rural idylls' in social constructions of rurality. Following this, macro-level (or global) structures and processes, national (Australian) level rural restructuring issues, and contemporary rural theory in relation to change and transition are discussed. Relevant rural tourism research in Australia is then reviewed.

2.3.1 NOTDEFINING THE RURAL

This study does not endeavour to define the 'rural', yet approaches the topics of wildflower industry development and change within the broad scope of rural studies. Why? Because, there are multiple approaches to determining the nature of the

'rural', linked to social perceptions of how the rural may be perceived. Would a specific definition of rural assist with analyses of wildflower industry change and opportunities for tourism development? Or is it satisfactory to consider that the industry in question fits within that which could be deemed rural under multiple definitions? That is, could one argue that this is *not* a rural study?

Many authors, including Moseley (2000), Halfacree (1993; 2006), Mormont (1990), Cloke (2005; 2006), Woods (1997; 2005), Robinson (1990), Lockie and Burke (2001a), Marini and Mooney (2006), and Perkins (2006), have variously discussed definitions of the rural and the complexities of determining the most appropriate definitions.

Halfacree (1993) notes six descriptive defining groups pertaining to 'rural', and cites multiple authors who have discussed the concept against each of these defining areas, namely: statistical; administrative; built-up area; functional regions; agricultural; and population size/density. Each definition-type, the author argues, provides tool(s) for articulating specific aspects of rural, and endeavours to describe "*what we already intuitively know to be rural*" (Halfacree 1993: 71. Emphasis in original). Halfacree further considers socio-cultural definitions of the rural and the dichotomies posed by rural-urban differentiation and by discussions of rural-urban continua. He notes that such approaches, too, are unsatisfactory, and rely upon "a false dichotomy between space and society" (Halfacree 1993: 73). The argument provided by Halfacree, after some consideration, is that problems in defining the rural stem from "a failure to distinguish between the rural as a distinctive type of locality and the rural as a social representation" (Halfacree 1993: 86). Consequently, social representations influence the 'rural' space, by changing that space.

Mormont argues that rural is a social construct – a "category of thought" (1990: 40) – heterogeneous and multiple. Cloke summarises, "there is no single rural space, but rather a multiplicity of social spaces that overlap the same geographical area" (Cloke 2005: 454). Thus, "rural space is increasingly defined heterogeneously through the social construction of its participants, according to their expectations and experiences" (Woods 1997: 321).

Woods further describes the difficulties in defining the rural and states that "attempts by academics to define and delimit rural areas and rural societies have always run into problems (2005: 15). Woods takes the approach that 'the rural' is not about

“distinctive territorial geographies” or “distinctively rural social processes”. Instead, he focuses on “examining the processes that shape people’s experiences and perceptions of contemporary rurality” (Woods 2005: 15). In the post-modern rural arena, where participants in rural space are multiple and varied, Woods argues that the concept of many different, socially constructed rurals is particularly relevant. It contrasts with the modernist tendency “for tidy and clear divisions: urban and rural” (Murdoch and Pratt 1993: 416).

Marsden (2003: 151), cited in Marini and Mooney (2006), provides analytic and policy arguments for moving away from a strictly geographically defined notion of ‘local rural area’, and recognises the differentiation of rural spaces as being enmeshed in “webs of local, regional, national and international supply chains, networks and regulatory dynamics”. Perkins similarly suggests that the “rural, and interpretations of rurality, are ... complex and underpinned by material and symbolic factors” (2006: 245). Furthermore, it has been suggested that “our sociological understanding of rurality is best guided by the particular context in which the concept is to be applied and by the meanings that rurality has for participants in those contexts” (Lockie and Bourke 2001a: 10).

In the case of the wildflower industry in southern Western Australia, the meaning of ‘rural’, what it constitutes, and how actors are involved in rural systems will vary according to the specific contexts of the individual industry participants. The research techniques applied and the actor-network analytical approach contribute to understanding the various meanings of rural for the entities involved. The overall purpose of this discussion was to point out that while there will be many rural definitions applicable to various aspects of the wildflower industry, it is not necessary to have a finite understanding of the term. What is necessary is an acknowledgment that *rural* change, *rural* ideals, *rural* lifestyles, *rural* development and *rural* tourism are indeed relevant to this research program. A key concept for further deliberation, however, and one that influences much of the work undertaken in this study, is the concept of the *rural idyll*.

2.3.2 RURAL IDYLLS, COUNTERURBANISATION AND LIFESTYLE CHOICES

Rural idyllism, as opposed to urban existence, is linked to those social representations of rurality that portray various aspects of harmony, health, escape (from modernity) and a more simplified life as existing in the country (Ilbery 1998).

These representations contribute to the multiple and varied perceptions of the rural which make it impossible to describe 'just one rural' in a post-modern or post-structural analysis.

In addressing a variant of the concept, Bessant (1978) describes the 'idealisation of the bushmen', wherein city-dweller yearns for the 'lost Eden' that is the 'rural myth'. Other authors (for example, Halliday and Coombes 1995; Spencer 1995; Ilbery 1998; Finkelstein and Bourke 2001; Murphy 2002; Cloke 2005; Bell 2006; Cloke *et al.* 2006; DuPuis 2006; Halfacree 2006; Short 2006) have also discussed idyllic images of rurality and their resultant impacts, to varying degrees, upon changing rural systems. As Short (2006) notes in his historical analysis of the rural idyll, the concept is ambiguous. Rurality, to Short, is relative – an entity can only be considered rural if there is something 'non-rural' to compare it with, and he argues that this also applies to idyllism. As with the concept of the 'rural', this relativity allows for individual interpretations to be applied to the 'rural idyll'.

The rural idyll can be a strong force guiding migration (Boyle *et al.* 1998). Contemporary, popular concepts of 'sea change', 'tree change', and even 'hill change' are fostered on adaptations of the rural idyll, promoting images of 'downshifting to a slower life' (See, for example, www.slowmovement.com/seachange or www.seachange-treechange.com.au; Anon 2007, 2008). Importantly, and related to the variations on the 'sea change' concept, Cloke and Little describe the rural idyll as "an important and long-standing agent of social change (despite itself being based on a presumption *against* change)" (1990: 21). These authors note the movement's class-based implications, with the middle classes having a strong ability "to take advantage of the perceived attributes of rural life and, in doing so, to impose quite profound changes on the social and physical environment" (Cloke and Little 1990: 22).

Linked concepts of counterurbanisation or urban-to-rural migration are variously connected to rural idyllism and the relatively modern concept of 'sea change' (Champion 1989; Frey 1989; Hugo 1989; Murdoch and Marsden 1994; Dahms 1995; Lewis 1998; Phillips 1998; Dahms and McComb 1999; Murdoch 2003). Dahms and McComb note that

...counterurbanisation includes the redistribution of population from urban to rural and population movement from larger to smaller places, whereas 'rural-

urban turnaround' is a subset of counterurbanisation signifying the growth of rural areas. (Dahms and McComb 1999: 129).

Counterurbanisation concepts, and the potential reshaping of various rurals by newcomers or in-migrants, have been considered throughout the implementation of this research program and the development of this report.

Discussion on the concept of urban-to-rural migration emerged in the 1960s and 1970s, with much contemporary debate regarding whether or not, and to what extent, the phenomenon of counterurbanisation exists (Pahl 1965; Clout 1972; Champion 1989; Dahms 1995). While largely an ambiguous concept with limited robust definition (Champion 1989; Halliday and Coombes 1995), continuous efforts are being made to provide a framework for the understanding and use of the term to describe certain processes contributing to rural change.

There is additional debate as to whether counterurbanisation is a distinct and/or new phenomenon, or whether changes which have been witnessed are an extension of existing suburbanisation and decentralisation (Champion 1989; Halliday and Coombes 1995; Dahms and McComb 1999). Furthermore, the trends associated with counterurbanisation increasingly blur the lines between 'urban' and 'rural' as constructs for debate and analysis. Redefining of the socially constructed 'rural' will inevitably emerge with in-migration to rural areas.

While numerous arguments surrounding the philosophical undercurrents and trends resulting in movement towards rural areas exist, lifestyle can undeniably be singled out as a significant contributor to such movements. Dahms and McComb (1999: 133) provide a succinct summary of recent counterurbanisation conceptualisations. What is evident from this summary is that the themes of lifestyle choice, rural amenity and utility are widely recognised as being amongst the major drivers of population increase in rural areas. These are invariably linked to rural idyllism. The existence and influences of counterurban migration upon the development of the wildflower industry are considered later in this thesis.

The premise that lifestyle choices have influenced the development of Western Australia's southern wildflower industry provides a further point for consideration. This is based largely upon research indicating that in-migration to rural areas for lifestyle reasons, amongst others, has been occurring in the developed world over recent decades.

Rural idyll images, in relation to lifestyle choices, are thus important in the context of this research, because they may help us to understand the motivations of industry participants and any potential opportunities for tourism development (see Section 2.4). The challenge for this research program lies in recognising where (if anywhere) idyllism fits within the relationships and linkages of the wildflower industry actor-networks, and how (if at all) it influences decision-making and transition within the multifunctionality spectrum described in Section 2.3.4.

2.3.3 RURAL CHANGE

Australia's rural society is changing rapidly, restructuring amid globalisation, enduring the impacts of environmental problems and changing with the wider processes of social change. (Gray and Phillips 2001: 59).

This section considers a number of related processes at global and national scales which are pertinent to this research on the wildflower industry in southern Western Australia. Agricultural change is considered first, incorporating aspects of restructuring and agricultural transition. Following this, broader rural change processes and implications are reflected upon. However, it should be noted that, while this discussion is differentiated for ease of articulation, in practice the issues and theories presented are not always distinctly agricultural *or* rural. The purpose of this differentiation is also to point out that agriculture is but one part of the rural, and the terms are not interchangeable.

Australian agriculture and Australian rural areas have been affected by a multitude of global forces related to the "progressive transnationalism of capitalism, the increased global mobility of capital and people, the redirection of the activities of the nation state, and the greening of western societies" (Lawrence 2005: 104). Many processes of rural or agricultural change stem from broader and more general socio-economic and political processes (Ilbery 1998). Globalisation, defined as "a process through which space and time are compressed by technology, information flows, trade, and power relations, allowing distant actions to have increased significance at the local level" (Lawrence 2005: 105) is one such macro process affecting the economy in which agricultural industries lie.

Australian agriculture and rural areas have not been immune to globalisation, with Australian governments having progressively supported policies that align with the concept (McMichael and Lawrence 2001). Globalisation "subsumes the rhetoric of

development – with its underlying premise of state intervention – and reconstructs it as efficiency, competition and entrepreneurialism” (McMichael and Lawrence 2001: 164). The only identifiable ‘goal’, these authors argue, is the global integration of economic activity. Overall, “It is devoid of social goals” (McMichael and Lawrence 2001: 164). The influence of globalisation has led to the restructuring of agriculture. This has resulted in the significant rural change evident in Australia over the past thirty years.

This thesis does not argue for or against the impacts of globalisation upon the wildflower industry in southern Western Australia. The purpose here is to note the broader economic framework within which the industry resides, and to provide a larger context within which to consider the other processes that are affecting change at more localised or regional levels. The political economy lens enables a mechanism for reviewing the wildflower industry within a global context.

AGRICULTURAL CHANGE AND RESTRUCTURING

Many authors have noted that Post-World War II agricultural change has been influenced by broader social, political and economic system changes (see, for example, Vanclay and Lawrence 1995; Ilbery *et al.* 1997). Post-Fordist trends, complete with characteristics such as “niche marketing, product diversity, decentralised production, transformation of work, and global sourcing” (Vanclay and Lawrence 1995: 4) are beginning to emerge. However, as the authors note, it may be corporate agriculture (including transnational corporations) that is adapting to this trajectory, in view of “enhanced operations”. Hence, the corporate centrality of modern agriculture may remain. Other authors discuss opportunities for alternative agricultural futures, such as organic farming, which move away from corporatised agriculture – yet, as Burch and Rickson (2001) argue, it remains to be seen which models are likely to be embraced.

Woods (2005) suggests four key elements of agricultural change which will continue to impact upon the trajectories of rural spaces dependent on agriculture:

- 1) Political-economy analyses of agriculture as a capitalist industry “reveal the importance of the owners of capital”. “The integration of farmers into ‘food chain complexes’ dominated by corporations concerned with seed production, food processing and retailing, has left decisions about the

future of agriculture increasingly concentrated in corporate hands” (Woods 2005: 59).

- 2) Agriculture is one of the most regulated parts of the global economy. “This means that the state is a key actor”. (Woods 2005: 59-60)
- 3) Agriculture, “like all capitalist industries, relies on consumption, and hence consumers are a powerful group of actors.” (Woods 2005: 60)
- 4) The willingness or reluctance of farmers to diversify, in view of or in spite of above three issues.

Each of these drivers (the political economy, including state regulations, consumption, and the personal drivers affecting farm decision-making) have influenced rural Australia. The rationale for considering agricultural change within this broader rural change analysis is two-fold. Firstly, the wildflower production industry can predominantly be considered to involve a form of cultivated horticulture¹, and therefore can readily be classified as agriculture. Secondly, changes to agriculture can significantly effect changes in broader rural systems. Restructuring in agriculture (and its impact on rural change) is thus an important concept for consideration in this research.

...agricultural restructuring refers to the changes experienced on-farm as a result of pressures exerted by governments, agrifood industries and other businesses, rural restructuring is an all-embracing term that seeks to capture the changes to farming, to country towns, to regional communities and to the relationships that govern social, political and economic interactions in rural regions. (Lawrence 2005: 111).

The background to the restructuring approach lies in Marxist political economy: “The Marxist view of capitalist production highlights the ‘underlying logic’, the ‘hidden rationale’, of uneven development under capitalism” (Murdoch and Pratt 1993: 419). By considering the influences that underpin agricultural change, it is possible to gain insights into the circumstances of those existing in rural space who are affected by this change.

¹ *Bush-harvested flowers and foliage falls within the industry segment which can not be considered ‘cultivated horticulture’.*

To assist in understanding the restructuring arguments, consideration is given to productivist agriculture (see Table 2.1), and to the trajectories of rural and agricultural change which *seemingly* indicate challenges to the productivist ethos of capitalist production. This is addressed through the multifunctionality assessment provided in Chapter Seven.

Ilbery and Bowler (1998) identify three main forces shaping productivism in modern agriculture – commercialisation, industrialisation and commoditisation. Commercialisation refers to the degree to which capitalist influences within an agricultural operation are developed, and can be measured by supply/demand – that is, the proportion of the farm produce sold in the market.

Commoditisation (or commodification) represents the situation that occurs when objects take on an exchange value greater than use value, with an emphasis on farm inputs rather than farm outputs (Ilbery and Bowler 1998; Perkins 2006). Marsden (1998) links commoditisation to two important questions about contemporary rural space: “How do commodity and other social values shape social practices?” and “how are commodity relations and values generated, and challenged, through the active strategising, network building and knowledge construction of particular producers, consumers and other relevant users of rural resources?” (Marsden 1998: 23).

For this wildflower industry research, these questions need to be considered in relation to the non-productivist influences and rural idylls (or otherwise) that may drive the participants. Furthermore, and with specific reference to the focus on tourism, how might the use of wildflowers as a tourism commodity become a preferential economic strategy for industry participants? Is this likely? What processes are at play in southern Western Australia that might lead to this?

Industrialisation draws on elements of both commoditisation and commercialisation, and “adopts the food-supply system as its organising framework and focuses on long-run changes in capitalist agriculture in response to biophysical and natural production processes” (Ilbery and Bowler 1998: 60). Burch and Rickson (2001) also note the emergence of an ‘industrialised agriculture’ in the wake of globalising capital and Post-War Fordism, which the authors describe as “a system of production and marketing that is based on the application of modern industrial manufacturing, production, procurement, distribution and coordination concepts to the food and industrial product chain” (Burch and Rickson 2001:165).

Industrialisation includes intensification, concentration and specialisation. These are seen by Ilbery and Bowler (1998) as fundamental structural dimensions of productivist agriculture. This perspective also highlights the role of the state in “influencing the trajectory of agricultural change” (Ilbery and Bowler 1998: 61).

In addition, it needs to be recognised that rural areas are increasingly becoming sites of consumption (Vanclay and Lawrence 1995; Marsden *et al.* 1996; Marsden 1999; Murdoch *et al.* 2003; Woods 2005). Marsden describes *the consumption countryside* – “one which exhibits a wide range of external relationships and is subject to wide-ranging demands (not least from new residents, developers, tourists, food consumers)” (1999: 506). The outcome, according to Marsden, is heterogeneous differentiation, where “apparently similar areas demonstrate quite different characteristics in terms of key indicators, like net migration, commuting, deprivation, new enterprise formation, the degree of social cohesion or fragmentation, and so on” (Marsden 1999: 506). The concept of multifunctionality in rural areas begins to emerge.

If, in a broad sense, agricultural production is intensifying under capitalist production regimes, consumption values are increasing, and rural spaces are commoditising, does this not, potentially, create a paradoxical situation? Is a spatial coexistence of corporate agriculture and commoditised rural activity possible? Marini and Mooney (2006) pose the following questions:

Are rural areas moving toward increased diversity, ever more homogeneity, or some simultaneous and contradictory combination? How does globalisation affect these trends? Can types of rural economies be formulated to better understand the remaining or developing diversity? What roles do states play in rural economies? What role does social class play in rural economies? How do these factors facilitate or subvert the sustainability of rural areas? (Marini and Mooney 2006: 91)

These questions are considered in relation to the changing ruralities encompassed by the southern wildflower industry, through the actor-network and political economy analyses of the research data. The questions indicate the multiple ruralities that exist, and the heterogeneity that emerges due to the complex variables affecting rural society and agriculture.

Marsden (1990) is referring to the British context when he writes:

...the perception by urban populations of rural areas as sources for amenity and environmental values and for living rather than producing is increasingly if reluctantly reflected in state policy. Such a re-definition or shift in the dominant values and activities associated with rural areas will provide more varied opportunities for producers previously dependent upon agricultural markets and policies. (Marsden 1990: 381).

The influence of state policy on the wildflower industry in the South West and Great Southern Regions is considered in this thesis, in relation to a forest management policy driven partly by changes in society's consumption and environmental values.

Another concept warranting brief discussion is that of pluriactivity, considered by Vanclay and Lawrence (1995) to be 'a survival strategy' for farms in Australia. Pluriactivity refers to "the generation, by farm household members, of income from on-farm and /or off-farm sources in addition to income obtained from primary agriculture" (Ilbery and Bowler 1998: 75). The incidence of pluriactivity in developed market economies is considered to be high, with farm tourism a notable example (Ilbery and Bowler 1998). (It should be noted however that the concept of income diversification through pluriactivity is not restricted to developed markets, with farmers in developing countries also likely to engage in comparable economic survival strategies).

Important to note in the context of this current research is Vanclay and Lawrence's assertion that pluriactivity "is becoming a preferred option for those farmers (and family members) seeking alternative occupational opportunities and lifestyle options" (Vanclay and Lawrence 1995: 14). The authors recognise, however, that the structural adjustment opportunities posed by pluriactivity "are likely to remain limited so long as regional economies are not provided with stimuli to attract industry" (1995: 14). Furthermore, the following excerpt from Ilbery and Bowler (1998) notes the complexities associated with the concept:

Geographical patterns of pluriactivity are rarely that straightforward. Instead, they reflect the interaction of a number of factors external and internal to the farm business. For example, a relationship exists between regional socioeconomic conditions (for example, local labour markets, unemployment) and rates of pluriactivity. Thus, pluriactivity is further developed in those regions where labour markets are well structured and diverse. Nevertheless, the evidence is not conclusive and other factors have

to be considered. Although forces beyond agriculture explain the incidence and patterns of pluriactivity, the growing participation of women in the labour force for social rather than economic reasons has become a dominant driving force. Similarly, local cultural factors and specific landscape designations, such as national parks, can affect the distribution of pluriactivity. (Ilbery and Bowler 1998: 77).

This research program considers the degree of pluriactivity evident in the southern wildflower industry in Western Australia, and takes into account the varying influences noted above by Ilbery and Bowler (1998). Furthermore, the research addresses the outcomes of this analysis within the conceptual framework of a transition away from purely production-oriented agriculture, towards the 'sale' of rural amenity through tourism. Is a shift towards the 'consumption' of the rural environment evident in the wildflower industry, and can it be tapped in order to gain tourism advantages? Current research relating to options for undertaking this analysis is discussed below.

2.3.4 A MULTIFUNCTIONAL RURAL TRANSITION?

Various authors have described the change in agriculture from the 1950s to the mid-1980s as conducive to a *productivist* phase (for example, Ilbery *et al.* 1997; Ilbery and Bowler 1998). The period from the 1980s onwards, which characteristically includes trends towards consumption of and amenity values within rural areas (Marsden 1990), has been discussed (predominantly in Britain (Wilson 2001, 2007; Argent 2002; Holmes 2006; Bjorkhaug and Richards 2008)) as a *post-productivist* phase. The utility of the concept of post-productivism, particularly to non-British scenarios, has been questioned (Argent 2002; Holmes 2006).

Table 2.1 summarises various characteristics of productivist and post-productivist regimes:

Table 2.1 Productivism and Post-Productivism

	PRODUCTIVISM	POST-PRODUCTIVISM
Temporality	Early 1950s to mid 1980s.	Late 1980s onwards.
Characteristics	<p>Driven by production values. Continuous modernisation and industrialisation of agriculture via intensification, concentration and specialisation.</p> <p>Linked to corporatisation of agriculture (post-Fordist management structures).</p>	<p>Integration of agriculture within broader rural economic and environmental objectives. Consumption values increasing in influence. Focus on sustainability.</p> <p>Transition towards extensification, dispersion and diversification (see Ilbery and Bowler (1998: 70-71).</p>
Emphasis	<p>Raising farm output; maximising the production of commodities.</p> <p>Intensive, industrial driven agriculture supported by the state.</p>	<p>Production and trade of quality product ; “small-scale farmers” (Argent 2002: 100); increased rural heterogeneity; declining concentration of farm ownership; increase in consumer-friendly and environmentally-friendly agricultural practices.</p>
State influences	Government support via subsidies, price guarantees and protectionist policies.	Government policy transition toward environmental protection; land stewardship. <i>Increased</i> regulation of agricultural practices (Bjorkhaug and Richards (2008: 100)).
Other features		Integration of values from interest groups – such as environmentalists and new rural residents. Increase in significance of amenity values in rural space.

Developed from Ilbery and Bowler (1998); Argent (2002); Bjorkhaug and Richards (2008).

NB: A very detailed differentiation of productivist and post-productivist arguments can be found in Wilson (2001: 80)

Despite the interest in the post-productivist transition within British rural geography, Argent (2002) and Holmes (2006) question its validity in Australia, while Wilson (2007) also argues that the concept of a post-productivist transition is no longer tenable. It has been suggested that post-productivism would be expected to exhibit signs of pluriactivity, extensification (farm input reduction, replacement of intensive agriculture with extensive forms), dispersion (trends away from large, capital intensive farms) and the “creation of consumptionist countrysides” (Argent 2002: 108). The author describes this as “a process of conversion of formerly dominant agricultural landscapes into spaces and sites of conspicuous consumption” (Argent 2002: 108).

Furthermore, Argent considers, in his analysis, evidence (or the lack thereof) to support arguments for post-productivism in Australia, but finds the data availability wanting and is unable to generalise that post-productivism is indeed occurring here. He notes, that “to the extent that they exist at all, Australian post-productivist countrysides are overlaid by the spatially selective counter-urbanisation processes and extant patterns of geographically uneven development” (Argent 2002: 111). Argent does, however, point out that proponents of post-productivism note that this process does not necessarily occur in “equitable, socially progressive ways” (Argent 2002: 111).

Wilson (2001, 2007) provides similar arguments in his critique of post-productivist debates. Wilson believes that “different localities are positioned at different points in a temporal, spatial and conceptual transition from ‘pre-productivist’ to post-productivist” (Wilson 2001: 77). The author questions the “implied directionality of the traditional productivist/post-productivist debate” (2001: 77), and links the “relatively uncritical acceptance” of such debates to a similar “lack of clear evidence of a shift from Fordist to post-Fordist modes of accumulation” (Wilson 2001: 95). Other researchers, such as Elands and Praestholm (2008), have found evidence of both modernisation (of agricultural practice) and restructuring (to a post-productivist –type mode), can occur simultaneously within a farming enterprise. This point has been noted in other post-productivist literature (see, for example, Ilbery and Bowler (1998)). Such findings provide grounds for querying the nature of the post-productivist *transition*, which implies a unidirectional and temporal relationship between productivism and *post-productivism*.

Australian researchers Cocklin and Dibden (2005) discuss the emergence of the post-productivism concept overseas, and note that “Australia has been grappling with the opposite problem – how to combine an already liberalised economy with the need to move towards more sustainable land management and how to maintain viable rural communities” (Cocklin and Dibden 2005: 249). Argent (2002) and Cocklin *et al* (2006) similarly note the growing realisation in Australia of the need for improved natural resources management in rural areas. This contributes in part to a shift which is occurring – though Argent is hesitant to claim that post-productivism has commenced. A part of the reasoning behind this hesitation lies within his acknowledgment of the existence of multiple rurals and of uneven development in regional Australia. The ‘macro-structural concept’ that is post-productivism is seen as being unable to account for, or to incorporate, local scale events and processes. Argent believes this is because “farm-level dynamics do not fit neatly into any productivist/post-productivist divide” (Argent 2002: 111). Wilson’s argument aligns with this proposition, when he suggests a “multifunctional agricultural regime” analysis which “encapsulates the diversity, non-linearity and spatial heterogeneity that can currently be observed in modern agriculture and rural society” (Wilson 2001: 77). The alternative terminology (that is, a multifunctional agricultural regime rather than a post-productivist transition) is preferred by Wilson, because the term “post-productivism” implies that this paradigm would necessarily come *after* (post-) productivism, and he considers that this is not necessarily so.

These postulations indicate a need to consider the possibility of multiple scenarios existing, when analysing the status of an agricultural entity in a rural development context. As such, any form of analysis of the state of change in rural Australia needs to be able to deal with the multiple rurals that exist.

Holmes (2002) suggests the concept of a “multifunctional [rural] transition” as an appropriate approach to analysing rural change:

...the multifunctional transition involves a radical re-ordering in the three basic purposes underlying human use of rural space, namely *production*, *consumption* and *protection*. The transition can be characterised as a shift from the formerly dominant *production* goals towards a more complex, contested, variable mix of *production*, *consumption* and *protection* goals. These three basic goals can be linked to the forces driving the transition to multifunctional rural occupance, namely agricultural overcapacity (the

production goal), the emergence of market-driven amenity uses (the consumption goal) and changing societal values (the protection goal). (Holmes 2006: 142-143).

It should be noted that the concept of the multifunctional rural transition differs from the concept of *multifunctional agriculture*. Agriculture is considered to be multifunctional when, in addition to the basic production of food or fibre product, it assists in other functions such as the maintenance of land resources, the protection of biodiversity, or contributing to the social sustainability of rural areas (Potter 2004). In contemporary Australian rural and natural resources management policy, many of these functions fall within the concept of 'ecosystem services' and through approaches to 'land stewardship' (Cocklin *et al.* 2006). This traditional concept of multifunctionality has been questioned (Cairns Group 1999) on the grounds that it may be used to justify increased protectionism in agriculture. However, there are other approaches to, and interpretations of, multifunctionality, which indicate its utility in considerations of rural and agricultural change.

Cocklin *et al.* (2006) highlight the importance of acknowledging which interpretation of multifunctionality is being used. These authors suggest that the use of the term, within the *context* of the 'post-productivist paradigm of rural development' (after Marsden and Sonnino (2005)) and of a multifunctional approach to rural policy, may be appropriate. Marsden and Sonnino (2008) extend the discussion on this topic, to suggest that there are three paradigms of multifunctionality in rural policy development in the United Kingdom:

- (1) *Multifunctional agriculture as a palliative to the productivist 'cost-price' squeeze*. The authors argue that this paradigm of multifunctionality is limited to pluriactivity, and can be interpreted as "a survival strategy that helps the least productive farmers to combat increasingly harsh market conditions" (Marsden and Sonnino 2008: 423). This interpretation of multifunctionality is commonly equated to that which has been used by the European Union, and is the multifunctionality paradigm which Australia has rejected. This form of multifunctional agriculture, in which farmers are paid by their government for non-production services, has been formally rejected by the Australian Government and others as an excuse for the imposition of trade barriers (Cairns Group 1999; Anderson 2000; Wilson 2007; Dibden and Cocklin 2009).

- (2) *Multifunctional agriculture as spatial regulation of the consumption countryside.* Marsden and Sonnino differentiate this paradigm of multifunctionality as one based on “the perception of rural areas as consumption spaces to be exploited not only by industrial capital, but by the growing urban and ex-urban populations” (2008: 423). Under this model, they argue, the ‘farm-based’ approach to multifunctionality is replaced by a ‘land-based’ one in which the different functions of agricultural land are emphasised and demarcated through farmland diversification. This interpretation of multifunctionality can be witnessed through the planning and environmental regulations that are placed on agricultural areas.
- (3) *Multifunctional agriculture as part of sustainable rural development.* The approach “reasserts the socio-environmental role of agriculture as a major agent in sustaining rural economies and cultures” (Marsden and Sonnino 2008: 423). According to the authors, this paradigm is the one most suited to understanding and fostering rural development. Furthermore, they argue that to be multifunctional under this paradigm, an activity must (a) add income and employment opportunities to the rural sector; (b) contribute to the needs and expectations of society; and (c) “it must imply a radical redefinition and reconfiguration of rural resources, to varying degrees, in and beyond the farm enterprise.” (Marsden and Sonnino 2008: 423).

This latter paradigm is the one most closely aligned with the analytical approach within this thesis. However, authors such as Holmes (2002) and Wilson (2007) seek to advance the discourse on multifunctionality, to address the concept as a *process* “rather than as a relatively *static* and *compartmentalised* descriptor of agricultural and non-agricultural decision-making at a specific point in time.” (Wilson 2007: 327).

Wilson proposes that multifunctionality should thus be utilised as a concept to “describe and explain agricultural change” in addition to “merely explaining economic and policy-based processes” (Wilson 2007: 327). It is this notion of multifunctionality that is used within this thesis in an attempt to understand the forces at play within the wildflower industry.

In considering multifunctionality, Holmes (2006) describes the forces relating to production, consumption and protection in rural areas, and proposes seven “modes of occupance” that he suggests can be identified in rural Australia:

Productivist agricultural occupance (production values dominant)

Rural amenity occupance (consumption values dominant)

Small farm or pluriactive rural occupance (mix of consumption and production values)

Peri-metropolitan occupance (intense competition between production, consumption and protection values)

Marginalised agricultural/pastoral occupance (potential integration of production and protection values)

Conservation occupance (protection values emphasized)

Indigenous occupance (protection values emphasized)

(Source: Holmes 2006: 146-150. Refer to this publication for suggested characteristics of each occupance mode)

Holmes' concept is summarised in Figure 2.1 taken from his 2006 paper:

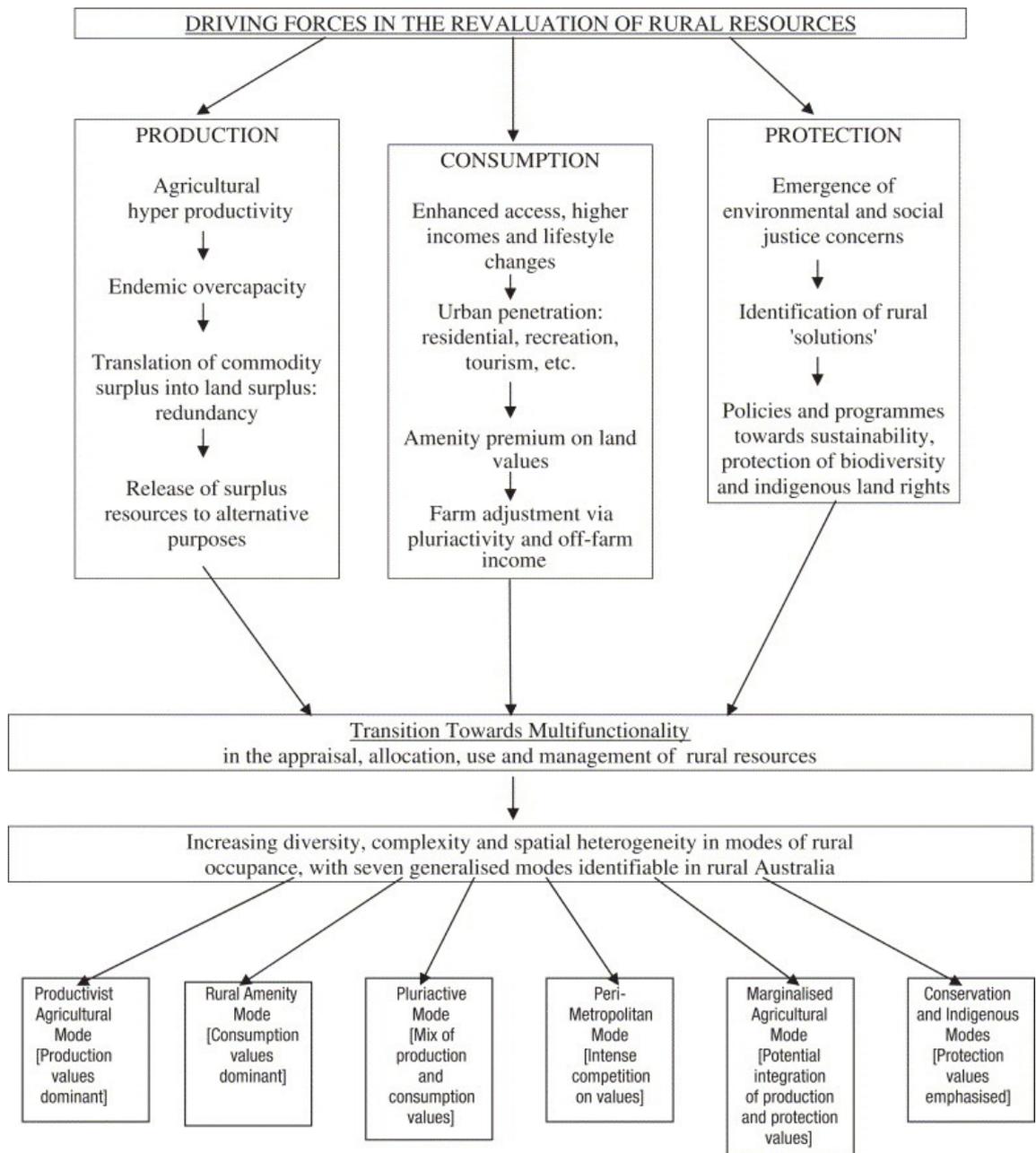


Figure 2.1 The transition to multifunctional resource use of rural space in Australia: driving forces and territorial outcomes.

(Reproduced from Holmes 2006: 144)

The multifunctional transition framework has potential for describing and understanding the multiple modes of rural occupancy in Australia, and thus for appropriate policy development. It recognises that various intertwinings of production, consumption and protection can influence the occupancy mode of entities in the landscape. Holmes (2006) notes, however, that the complexity of the

issues addressed within his framework makes it difficult to spatially represent the rural occupance modes defined therein.

Holmes' construct has merits which contribute to its relevance to research into the wildflower industry in southern Western Australia. As is discussed in the latter part of this thesis, the wildflower industry does not consist of a group of homogeneous individuals or a 'single rural'. Spatial representation of the characteristics of wildflower industry participants will be shown to be difficult due, in part, to the complexities noted by Holmes in analysing where participants 'sit' within the production/consumption/protection values triangle. It will be argued that due to the diversity of the industry participants, and with distance (Young 2006) affecting interagency within the industry, social, economic and spatial heterogeneity are likely to remain, and thus that a conceptual framework which allows of multiple rurals is appropriate.

The framework proposed by Wilson (2007) is utilised in this thesis to consider the situatedness of wildflower industry participants on a productivist/non-productivist continuum. This enables individual motivations and perspectives to be considered within a broader framework which takes into account that individuals may be driven by more than purely economic or lifestyle influences.

Wilson argues that contemporary conceptualisations of multifunctionality have focused on "structuralist political economy interpretations that have largely neglected post-structuralist and 'cultural-turn' related emphases on grass roots stakeholder actions and thoughts" (Wilson 2007: 210). He suggests that a more holistic view of multifunctionality should be adopted, which takes into account the interlinkages between "rural development, culture, the consumption countryside, societal needs, agency-led patterns and processes of agricultural and rural change, as well as environmental issues" (2007: 211). As such, the concept is seen by Wilson to be broader than an economic policy issue, since this would merely place it within the paradigm described as 'a palliative to the productivist 'cost-price' squeeze' by Marsden and Sonnino (2008).

Furthermore, Wilson (2007) sees the roots of multifunctionality as being theoretically anchored within the productivist/non-productivist model, as discussed earlier. He argues that the productivist and non-productivist model underpins a multifunctionality spectrum, along which producers may make decisions in either direction. According to Wilson,

A spectrum ... best encapsulates the embedded hybridity in human decision-making processes. Contrary to the binary notion of productivism and post-productivism, the notion of a spectrum enables us to situate and understand *multiple* actions and processes simultaneously in a non-linear and spatially heterogeneous way, without losing sight of transitional processes affecting agricultural pathways. (Wilson 2007: 216).

Within this multifunctionality spectrum, multiple pathways can exist between productivist and non-productivist thought and action, and directional changes can occur over time. Wilson differentiates weak and moderate multifunctionality and the concept of being 'beyond agriculture' in a rural space, as follows:

Table 2.2 Characteristics of weak, moderate and strong multifunctionality

<p><i>Weak Multifunctionality</i></p>	<ul style="list-style-type: none"> • Strong productivist tendencies • Weak environmental sustainability • Locally disembedded (vertically integrated rural/farming communities) • Long food supply chains • High farming intensity and productivity • Strong integration into global capitalist market • Low degree of diversification • Farming/rural populations who see 'farming' and 'agriculture' as almost exclusively concerned with productivist food and fibre production • Societies who argue that the nature of 'farming' and 'agriculture' have not changed
<p><i>Moderate Multifunctionality</i></p>	<ul style="list-style-type: none"> • Productivist and non-productivist tendencies • Moderate environmental sustainability • Moderate local embeddedness • Medium food supply chains • Medium farming intensity and productivity • Moderate integration into global capitalist market • Moderate degree of diversification • Farming/rural populations who see 'farming' and 'agriculture' partly as going beyond productivist food and fibre production • Moderately open-minded societies who accept that the value of 'farming' and 'agriculture' is in the process of change

Strong Multifunctionality	<ul style="list-style-type: none"> • Strong non-productivist tendencies • High environmental sustainability • Local embeddedness (horizontally integrated rural/farming communities) • Short food supply chains • Low farming intensity and productivity • Weak integration into global capitalist market • High degree of diversification • Open-minded farming/rural populations who see 'farming' and 'agriculture' as processes that go beyond productivist food and fibre production • Open-minded societies who accept that the value of 'farming' and 'agriculture' is in the process of change
'Beyond Agriculture'	<ul style="list-style-type: none"> • Exclusively non-productivist • Non-agricultural multifunctionality

(Wilson 2007: 229)

Wilson's personal preference is for 'strong multifunctionality' which he argues is more environmentally and socially sustainable than moderate or weak multifunctionality. However, this thesis does not take that stance. The thesis considers the responses of producers to determine where they may be situated in a multifunctional transition assessment, but does not make moral judgments about the decisions of individual producers.

The benefit of using this model lies, however, in its

... *in-built localising tendency* that allows greater temporal and spatial portability than the productivism/non-productivism model and that is more sensitive to local geographies while also enabling analysis of macro-scalar patterns and processes. (Wilson 2007: 222; emphasis in original).

Wilson's multifunctional transition model provides a useful tool for considering industry development trajectories, by addressing the combined agencies of producer decision-making at a local or regional scale. In integrating this approach with that offered by actor-network analysis, a useful framework for assessing the structure and agency influences and impacts of producer decisions emerges. This assessment opportunity can occur on an individual scale, or can be aggregated for use in descriptive analyses at industry level or geographic scale.

Wilson's critique of the post-productivist transition specifically notes that "*conceptualisations of post-productivism would benefit from the injection of an actor-oriented and behaviourally grounded approach that ... considers the changing endogenous perceptions and attitudes of actors involved in decision-making processes*" (Wilson 2001: 85; emphasis added). The author acknowledges the political economy (or macro-level) basis of many considerations of post-productivism, and identifies that additional substance can be added to ongoing debates with more localised behavioural analyses. He recognises the need to "go beyond analysis of broader ideological changes" (Wilson 2001: 87) and to consider whether the values of industry actors, including industry development officers (for example, extension agents, policy officers) reflect a shift within the post-productivist transition.

With this in mind, examination of the concept of the multifunctional transition at a localised level, through this wildflower industry research, may add to the debates summarised herein. This research provides micro-level analyses of empirical data, to consider the values and activity of not only the producers, but also those from whom producers seek advice.

2.4 RURAL AND NATURE-BASED TOURISM

Rural and regional tourism in southern Western Australia has grown in value and scope over the past two decades (Department of Conservation and Land Management 1998; Dowling and Watling 1999).

Rural tourism is amongst the most polymorphous of all forms of SIT [special interest tourism]. The diversity of attractions included within rural tourism embrace indigenous and European heritage sites; aspects of culture (especially agriculture); industrial tourism (especially when related to farm practices); educational tourism; special events; ecological attractions; adventure tourism... More specific emergent special interest forms of tourism such as wine tourism also share boundaries with rural tourism. (Killion 2001: 166)

As with many concepts related to rurality, rural tourism is difficult to define, and can be considered in terms of geographic localities, products or experiences offered, depending on the purposes for which it is being defined (Clarke 1999; Killion 2001).

Page and Getz (1997) link the difficulties in defining rural tourism to the difficulties (noted earlier) in defining 'rural'. Nilsson argues that rural tourism is a lifestyle-based concept dependent upon "ideas of what is rural and what is urban" (2002: 9), while Clarke (1999) proposes that the concept "embraces notions of local identity, personal contact, closeness to nature, and access to the heritage and residents of the area".

Importantly, as Page and Getz (1997) note,

...defining rural is not really of importance to visitors... They are seeking specific opportunities or environmental attributes which, regardless of the position on the urban-wilderness spectrum... might equally satisfy their needs and preferences. Defining rural is therefore more of a concern for policy-makers who want to do something about so-called rural problems. (Page and Getz 1997: 192-3).

For the purpose of this research, rural tourism refers to tourism associated with tourist experiences that differ from those offered in large urban areas or cities. The inclusion of tourism-related objectives within this research is at the request of one of the industry partners' sponsoring the research (the South West Development Commission) which anticipated potential synergies with existing tourism activities in the region, predominantly with wine-tourism.

Farm tourism can be seen to be a sub-set of rural tourism (Clarke 1999; Nilsson 2002). This can be defined as "rural tourism conducted on working farms where the working environment forms part of the product from the perspective of the consumer" (Clarke 1999: 27). The potential for farm tourism in the wildflower industry, from a supply perspective, is considered in this thesis.

Consideration of tourism associated with the wine industry in Western Australia provides a measure against which to benchmark future rural tourism in the study area. Research with wine industry tourism operators, conducted by the Western Australian Department of Training and Employment in 1999, concluded that

Wine tourism will be successful if:

- There is a strong regional focus, and each region develops and promotes its own image and product as a unique experience;

- Wine enterprises acknowledge and actively support wine tourism in their region;
- Wine enterprises in the region co-operate to promote their wine tourism area;
- Cellar door sales employees have strong customer service skills and can readily learn about the wine industry in general and the wines of the region in particular;
- Tourism operators have a strong customer focus and cooperate with wine enterprises to provide an enjoyable experience for visitors;
- *There are complementary tourism facilities and activities in the region;* [emphasis added] and
- Regional, State and national tourism bodies have similar and complementary wine tourism strategies to co-ordinate their activities.

(Department of Training and Employment 1999b: 3; emphasis added)

The relevance of the quote provided above is related to the geographical co-location of much of the wine industry in Western Australia (at a regional scale), with the South West comprising the Margaret River Wine Region (amongst others), and the Great Southern including the Mount Barker Wine Region. Could the wildflower industry provide complementary activities and facilities for tourists, such that both the wildflower and wine industries could receive synergistic benefits?

The diversity of opportunities offered by rural tourism presents

a major challenge in developing a sufficiently differentiated rural tourism product that has the drawing power that will not only attract visitors out of urban settings but will steer them away from competing rural destinations that provide a range of similar product components. (Killion 2001: 166).

Herein lies the challenge for the wildflower industry in the South West and Great Southern regions. Will tourism provide the saviour that will facilitate economic adjustment to changing agricultural and other rural circumstances? Many authors (see, for example, Jenkins 1993; Killion 2001; Prosser 2001; Walmsley 2003) recognise that tourism will not solve the problems of rural Australia, and that factors

such as distance (from urban areas or the 'source' of many tourists), and product development, are critical to the success of regional and rural tourism development.

The related concept of "nature-based" tourism is equally relevant to the wildflower industry in the study area. The *Nature Based Tourism Strategy for Western Australia* describes the concept as "a broad term that includes a range of tourism experiences including adventure tourism, ecotourism, and aspects of cultural and rural tourism" (Nature Based Tourism Advisory Committee 1997: 4). Western Australia's wildflowers have traditionally been synonymous with the State's tourism, with many wildflower-related experiences (for example, interpretation, product viewings, product sales) falling within the spectrum of nature-based tourism activities.

Ecotourism, a sub-set of nature-based tourism, has been defined as involving "education and interpretation of the natural environment and is managed to be ecologically sustainable" (Commonwealth Department of Tourism 1994: 17). As noted in the *Nature Based Tourism Strategy for Western Australia*, "regardless of which term is used, all tourism should be developed and managed in an ecologically sustainable manner" (Nature Based Tourism Advisory Committee 1997: 4).

This research is not preferential to any of the definitions for varying aspects of tourism related to experience, product or locality in the study areas. The opportunities for wildflower tourism, from the supply (grower/producer) perspective vary according to the individuals' own goals and aspirations. Future wildflower tourism development will depend on the goals and achievements of individual operators, and may fall under any of the definitions and descriptions offered above.

Research conducted in the south western regions in 1994-95 (Dowling and James 1995) resulted in the development of a *South West Region Ecotourism Strategy*. Various other efforts at analysing, quantifying and supporting the regions' tourism industries have been undertaken over recent years (see, for example, Selwood *et al.* 1996; Getz and Carlsen 2000; Carlsen and Wood 2004).

The role of tourism in the development of rural and regional communities has been summarised succinctly as follows:

Enhanced understanding of the significance and the role of tourism as a vehicle for rural community development ... helps re-conceptualise tourism

as a socio-cultural phenomenon, as an industry and as an economic activity within Australia. It is anticipated that this re-conceptualisation may inform the way tourism is approached and planned, particularly community based tourism involving protected areas such as ecotourism, nature-based, cultural and rural-tourism. The challenge is to ensure that tourism becomes, and remains, a dynamic tool of conservation management and community development... (Bushell *et al.* 2002: 33).

Although the authors were referring specifically to protected-area nature-based tourism (such as that within National Parks), their sentiments are valid in the consideration of tourism opportunities for rural communities and businesses within a regional context.

“Primary producers and rural communities have increasingly turned to tourism as an alternative means of achieving sustainable economic growth and development through restructuring, and greater diversification, of economic activity” (Killion 2001: 171). The situatedness of tourism within this thesis is two-fold. Primarily, the recognition and exploitation of opportunities for increased farm incomes and economic sustainability provides a potential avenue for farm and regional growth. Secondly, however, tourism is considered within an overall context of changing consumption values within the rural environment. Many authors recognise the relationships between tourism and the consumption of the countryside. Hopkins notes that “in order to attract urban tourists, the rural tourism industry both promotes and accentuates urban-rural differences by drawing upon country images that evoke and aggrandise myths of rurality” (1998: 139), while Butler and Hall (1998) agree – (rural) myths sell.

Garrod *et al* (2006) argue the case for tourism as the commodification or the reconceptualising of rural resources as countryside capital and further discuss tourism within the context of the consumption of the countryside, and of an increasing diversity of rural tourism products. Roberts and Hall note that “it is increasingly recognised that consumption is less about the product/service attributes that confer tangible benefits upon the buyer than the symbolic nature of consumption that defines images and demarcates social relationships” (Roberts and Hall 2004: 255). These authors suggest that subjective factors in consumption, and especially rural tourism consumption, are increasing in importance, and that “the

experience of tourism is therefore much more important than either the tourist or the tourism product or service” (2004: 255; emphasis added).

Within the multifunctional transition analytical framework in this study, the tourism discussion is thus partly about the impact of tourist demands to consume rural experiences. It is also about how wildflower producers choose to respond to trends in this direction, and about the economic returns that might be gained at local and regional scales.

2.5 CHAPTER SUMMARY

This chapter has presented a snapshot of relevant theoretical perspectives relating to rural change in Australia, and specifically of those applicable to the research on the wildflower industry in southern Western Australia. While it cannot cover all of the relevant research in full detail (due in part to the complexity of the research topic and the significant volume of literature related to rural change, rural development and rural tourism), it has endeavoured to summarise information relating to the main foci of this study.

Rural development is underpinned by the key features of diversity and multifunctionality (Knickel and Renting 2000; van der Ploeg et al. 2000) – “diversity reflected in the actors involved, the particular activities undertaken and the patterns of motivation that emerge, and the multifunctionality in the simultaneous and interrelated provision of different functions” (Knickel and Renting 2000: 512). What rural development opportunities exist in the wildflower industry in southern Western Australia based on these observations? This thesis will present information aimed at addressing this question, utilising an actor-network approach to understand micro-level agency and political economy considerations of the contexts in which the wildflower industry resides. It will use these frameworks to consider where the wildflower industry sits within the multifunctional transition hypothesis, and to inform discussion on existing and potential wildflower industry relationships with tourism based on this analysis. From this, a sound picture of the status and prospects of the industry, coupled with empirical research relevant to the complex and contested rural change theories emerging in Australia, has evolved.

CHAPTER THREE - RESEARCH METHODS

3.0 CHAPTER OVERVIEW

This chapter describes and justifies the methods used in this research. It begins with a brief recap of the philosophical underpinnings of the research (as described in Chapter Two), followed by a general description of the approach, a justification of the methods and a description of the techniques used. The chapter continues with a review of the methods used to analyse the data.

A range of methodological approaches was required to cover the complexity of issues relating to rural industry change. The case study approach comprised a number of linked activities. Data were obtained in the following ways:

- Desk-top review of existing industry data (secondary data)
- Interviews with industry development and support officers to obtain a better understanding of the operations of the wildflower industry
- Open surveys of wildflower growers and pickers
- Interviews with wildflower growers and pickers
- Interviews with wildflower wholesalers/exporters
- Survey of tourism operators

Elements of ethnographic practice were also considered useful, and are discussed later in this section. Overall, the industry assessment was undertaken using a combination of actor-network theory and data analysis.

A summary of the desk-top industry review is presented in Chapter Four, followed by the survey and interview results in Chapter Five.

3.1 METHODOLOGICAL BACKGROUND

As described in Chapter Two, the approach to this topic developed initially from a political economy perspective which identified the need to understand the structural context underlying the development of the southern wildflower industry. The approach has been utilised in rural geography research in efforts to understand the 'virtually inexhaustible' list of forces shaping rural Australia, including autonomous social and economic events, public policy, institutional arrangements, and environmental influences (Sorensen and Epps 1993). This approach was extended by actor-network analysis an effort to understand the broader range of relationships and entities influencing decisions made within the wildflower industry. That is, the research considers agency as well as structure in the analysis.

Figure 3.1 provides a pictorial representation of the approaches and techniques used in this study:

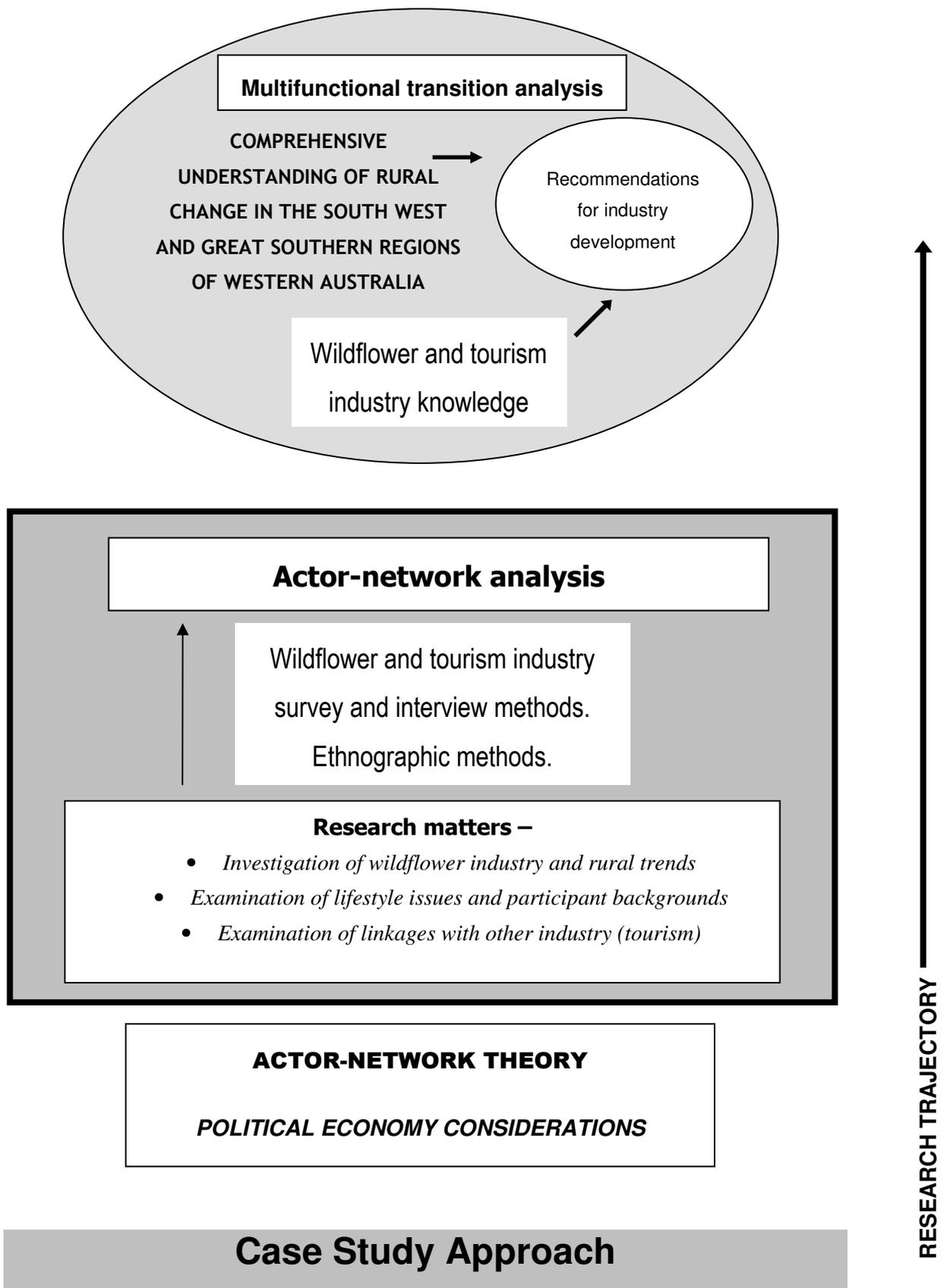


Figure 3.1 Research Program Structure and Process

The initial political economy approach was complemented by a humanistic consideration of the research question, permitting recognition of relationships between structure and social relations. Actor-network analysis enabled a local and/or micro-scale analysis to be undertaken at household or individual producer level, one which could reflect the real and specific influences upon actors in the wildflower industry. Some quantitative measures were also applied to assist in understanding the scale of the industry, the contribution made by individuals and the degree of influence that participants may have had in the network.

The techniques applied in this research followed a multi-method approach which included some simple ethnography-based procedures (Fetterman 1998). While this study program is far from being distinctly ethnographic, some principles from this methodology were considered and applied. Living and working within the study region in order to better describe and understand it was deemed a vital step in being able to successfully undertake this project. That is, the researcher aimed to be 'immersed in the culture' of rural change and agricultural diversification in the study area, in order to secure valid information. This was particularly so in regard to obtaining what was largely personal or commercially confidential information. Commitments on behalf of the researcher that all information obtained would remain confidential would not have been sufficient for participants to provide information unless a level of trust was established in the first place. While not considered part of the specific 'wildflower community', the researcher was nonetheless considered by study participants to be 'reasonably local', not only by residing in the study area, but by being actively engaged in agricultural production and farm diversification at the time the research was conducted. This latter circumstance provided an 'ice-breaker' topic of conversation which assisted in initial trust-building with participants.

Variations on conventional, anthropological ethnographic methods were used selectively to assist in comprehending the wildflower industry and the processes of rural change. Moris and Copestake (1993: 11) argue that the complexity of the rural situation in any locality dictates a need for "all mechanisms for the collection and absorption of data" to be selective. Selectivity enables the tailoring of approaches to particular circumstances and situations and permits flexibility in the implementation of varying methods to achieve the desired outcomes. Hughes *et al* (2000) note that modern ethnography acknowledges the subjectivity of knowledge and the subjectivity of the researcher's participation in it. As such, the approach recognises that many interpretations of data are possible. This enables flexibility to incorporate

a range of methods for researching the study topic. These include, as discussed later in this chapter, in-depth interviewing, participant observation and archival research, amongst those options which are generally considered 'normal' techniques of ethnographic research. (Cook 1997; Fetterman 1998; Hughes *et al.* 2000). Relatively long-term and 'in depth' engagement with the community being investigated was also deemed to be important, and was reflected through the various techniques applied.

Being able to understand and articulate (where necessary) the local contextual nature of responses from participants was seen by the researcher to be important to the study from the outset. This is particularly so given that the case study approach would provide descriptive and analytical data relevant to the particular circumstances of the wildflower industry in the South West and Great Southern. Understanding the contexts within which responses were given was deemed an essential component of a sound appreciation of the wildflower industry.

It must also be considered that in participant observation approaches, both the research process and academic writing are seen as social constructs, dependent largely upon the views of the researcher/writer, and thus open to subjective influence.

As noted earlier, while undertaking this research project, the researcher lived within the study region, had worked in the field of agriculture and rural development in the South West for many years, and is a product of a farming family (also within the region) which, like many of the businesses that participated in this study, was adapting its practices and activities due to global pressures and rural industry restructuring. This background and involvement of the researcher in the rural South West undoubtedly influenced the research process, the questions asked, the data obtained, and the modes of analysis. Acknowledging this subjective influence throughout the research program was vital if valid conclusions were to be reached. However, this approach provided a number of benefits. For example, local residency provided a simple 'sameness' that could act as an icebreaker when needed, in addition to reducing the metaphorical distance between the academic researcher and the industry participant. Negotiating 'entrance' to the wildflower industry by way of balancing academic credentials with local knowledge, personal networks, and respect for relationships of power existing in the industry, proved to be a delicate yet relatively successful requirement of the research program. As a

result, this study is based on the acceptance that research is inherently political since it “is always bound up in networks of power and/or knowledge” (Cook 1997: 135).

Furthermore, the applied nature of this research program, and the close involvement of the sponsoring (industry) partners in the development of the methods and the analysis of the results indicated a need for an inductive, self-reflective methodology. Due to the varying demands placed upon the researcher by the different industry organisations, it was important to be able to adapt and reflect upon the research progress and procedures at all stages of the study. The very existence of more than one industry partner implies that there is likely to be more than one opinion and more than one research question to be addressed during the research program.

Given the existence of varying partner expectations and requirements, the approach taken enabled flexibility in research, combined with an endorsed position of self-reflection on the part of the researcher and recognition of the subjectivity of the both the research process and the analysis of data obtained. The approach rejects the positivist stance that defines the researcher as neutral and detached, and recognises that “who we are influences the research questions we pose, the methods we employ to answer these, and the information/evidence we generate” (Hughes *et al.* 2000: 12). The practical implementation of the research involved recognition of this issue, and regular reflection ensured that subjective bias on the part of the researcher was minimised.

It should be noted however that in order to secure adequate information on the wildflower industry, some quantitative approaches were included in the methods applied. These are further described in Section 3.3. The inclusion of selected quantitative techniques assisted in the case study analysis of all data obtained, and also provided the industry partners with previously unavailable statistical information related to the size and demographics of the southern wildflower industry. While the qualitative data formed the basis of the majority of methods applied, obtaining basic data on the size and structure of the industry in the regions was a secondary goal of the overall research program. Combining quantitative and qualitative data assisted with the analysis. Triangulating qualitative and quantitative methods “may be one answer to encouraging the acceptance of ethnographic narratives within rural policy research” (Hughes *et al.* 2000: 8). However, the rationale for combining qualitative and quantitative techniques extended beyond this. To fully appreciate the nature of

rural change in the study area through a case study of the wildflower industry, it was deemed essential to be able to qualitatively support philosophical and social arguments with statistical data. Validation of the qualitative research with quantitative information, and vice versa, was thus integral to the research program.

Further supporting the research framework adopted was the ability to modify the research methods according to the needs of the subject (and thus participants) studied, rather than the other way around (Hughes *et al.* 2000). It is this aspect of ethnography which complements the inductive approach that underlies the methods of this study. Ethnographic flexibility enables opportunities to be taken throughout the study to gauge an emic (insider's) view where required, permitting the researcher to attempt to understand the subjects from the 'inside' (Cook 1997; Graham 1997; Fetterman 1998). Consequently, it was possible to undertake creative forms of participant observation (see Cook 1997; Fetterman 1998), in which the researcher was able to shift between varying degrees of 'participation' and 'observation' according to the circumstances arising.

The combination of flexible research techniques and the acceptance of the researcher's subjectivity provided sound underpinnings for the methodological approach to this research program. With ethnographic understandings offering a framework (and permissible flexibility) within which to develop the methods to be used, the researcher was then able to adopt techniques which suited the requirements of both the study and the participants in it. Effectively, this research program has included applying the application of ethnographic techniques, without conducting a traditional ethnography.

3.2 THE CHOICE OF CASE STUDY AS A METHOD

The use of case study as a research method is widely adopted in social science research. The case study is the preferred research strategy "when 'how' or 'why' questions are being posed, when the investigator has little control over events, and when the focus is on contemporary phenomenon with some real-life context" (Yin 1994: 11). Yin defines the case study as "an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident" (Yin 1994: 13). The case study permits the sacrificing of quantity for depth when learning about a particular situation.

Understanding the current state of the wildflower industry in the south-west corner of Western Australia fits neatly within these three criteria for using the case study: to understand the driving forces affecting the industry one must adequately address and attempt to comprehend the broad range of factors affecting it. That is, to understand the phenomenon, we must investigate the context in which it lies and the influences upon it – the case study enables investigation of both (Stake 1978; Yin 1994), providing avenues for understanding why a phenomenon occurs. It is in the *understanding* of a phenomenon that the case study gains strength over other, more objective or positivistic research approaches (Stake 1978).

The adoption of case study techniques fits neatly within the quasi-ethnographic stance taken by the researcher in this study. It permitted analysis and interpretation of participant responses within the varying contexts which influence the participants' involvement in the wildflower industry, and their own interpretations of their industry involvement. Furthermore, the case study approach supports the actor-network analysis by enabling thorough investigation and description in order that explanation and understanding can emerge.

The use of case studies in rural sociology and geography has been widely adopted, since they enable the development of grounded theories based upon both the phenomenon and the circumstances. The case study approach permits in-depth analyses of the contexts in which events and actions are embedded, providing the researcher with valuable insights beyond those that may be achieved in studies with broader foci. Put simply, the case study enables the explanation of actions within their structural contexts.

Case study methods, however, pose a potential constraint to the success of the research if generalising to theory (analytic generalisation) is not differentiated from the alternative generalising to populations, or statistical generalisation (Yin 1994; Crosthwaite *et al.* 1997). While comments about the general population derived from a case study may not necessarily be valid due to this constraint, it is possible to develop theory which can then be tested against the general population or against other cases. The replication of a case study offers the researcher (and others) opportunities for extending the lessons obtained from the initial case study to other examples and cases within society.

The application of the case study approach within this research program falls within the analytic generalisation category – that is, theory development and testing.

Therefore, this study differs slightly from that postulated by Yin (1994) under the analytic generalisation descriptor, in that this was, from the outset, a theory generative project, rather than conforming to the theory proving/disproving approach which characterises Yin's analytic generalisation (see also Crosthwaite *et al.* 1997). This complements the ethnographic approach in which the analysis is iterative, building on ideas and modifying methods as the study progresses (Fetterman 1998). However, this does not imply that the analyst cannot use the theories thus generated to comment on existing theories – as the analysis with regard to the multifunctional transition indicates.

In the use of case study methods, description and analysis of one phenomenon (in this case, the wildflower industry) cannot be assumed to be representative of all related phenomena (agricultural industries). For this reason, adequate contextualisation is essential. "As readers recognise essential similarities to cases of interest to them, they establish the basis for naturalistic generalisation" (Stake 1978: 7). Other authors, (for example, Stenhouse 1990; Crosthwaite *et al.* 1997) support this claim. It is in the interpretation of case study research findings that opportunities for applying case study results to other phenomena of similar attributes can be found. Generalisation and the application of case study findings are matters of judgment rather than calculation (Stenhouse 1990), and are as such subjective. Thus the importance of ensuring that the context surrounding the research entity is adequately described cannot be understated, since contextual similarities related to distinct phenomena allow the findings of case study research to be applied to other cases.

Further consideration must be given to the participatory basis of this study. From the outset, industry participants and government agencies supporting the development of the wildflower industry, were regularly involved in the evolution of this project. For this reason, qualitative research approaches targeted to the non-academic audience have been central to the sourcing of data, the reaching of conclusions and the presentation of the research outputs. As Stake (1978) suggests, it is foolish to assume that the non-academic reporting of the study will be the least effective. Milbourne (2000) adds to this argument by noting the importance of writing to suit the funding organisation(s), which, in this instance, were the South West Development Commission and the Department of Agriculture. Ensuring that the outputs and their reporting are suited to the level of understanding of the participating audience is an essential component of achieving the desired outcomes

of the industry partners – that is, improved understanding of the development and the current position of the wildflower industry within the regions' economies, and the opportunities or lack thereof for related tourism activities.

3.3 RESEARCH PROCEDURES

3.3.1 OVERVIEW

The research process involved a combination of methods, conducted in a number of inter-related stages, across phases of preliminary investigation and literature review (Stage One); wildflower industry survey and interview research (Stage Two); information dissemination, data clarification and refinement (Stage Three); and a consideration of future directions and potential (Stage Four) with a focus on wildflower tourism opportunities in the study area. These activities occurred within the context of the modified-ethnographic research and case study approaches outlined earlier. Analysis of the gathered data involved the application of actor-network theory in order that thorough description would lead to adequate industry understanding.

An inductive approach allowed flexibility, which enabled the research methods to be adapted to suit the progression of the study and the needs of the participants, as well as the needs of the researcher and sponsoring organisations.

In conformity with the local industry standard, this study included *Protea* and *Leucodendron* growers, included in the generic terms “wildflower growers” and “wildflower producers” throughout this thesis. The inclusion of cultivators of these African species is not uncommon in research into this industry, because of these plants' biological closeness with Australian flower species, similarity in cultivation practices, and similar marketing opportunities (Karingal Consultants 1997). Additionally, in many instances, the growers of Australian plants for cut-flowers simultaneously cultivate these non-Australian species, for the reasons outlined above and for agronomic efficiency.

Two separate approaches were taken in the program towards wildflower growers/cultivators, and wildflower pickers. The term ‘grower’ is used throughout this study to describe those individuals and businesses involved in the cultivation of wildflowers and foliage for domestic or export markets, from private land. Alternatively, ‘picker’ or ‘bushpicker’, describes those industry players who, under

licence from the Department of Conservation and Land Management (CALM), cut native foliage and flowers from private or State (Crown) land, for domestic and export markets. Combined, the groups are referred to as 'wildflower producers'.

The two groups (pickers and growers) are treated differently by industry support organisations and report themselves as being very distinct. Upon advice from agencies such as the Departments of Agriculture and Conservation and Land Management (CALM), different approaches were taken in addressing these distinct sectors of the industry. The differentiated research methods are discussed in detail in the stage-by-stage descriptions of the research process. The rationale for implementing varied approaches is presented in Chapter Four in a synopsis of the southern wildflower industry in Western Australia.

3.3.2 STAGE ONE – BACKGROUND DATA COLLECTION

Stage One research commenced with a review of the literature on rural and agricultural change (as presented in Chapter Two). Included in this initial phase was a review and analysis of statistical data from relevant census and local government information relating to the relevant agricultural industries. In addition, organisations including the Department of Agriculture, Flowerswest, Kings Park and Botanic Gardens (KPBG), the Department of Conservation and Land Management, the Western Australian Tourism Commission and the South West and Great Southern Development Commissions were consulted for feedback and guidance on the research project. (Appendix A provides a summary of organisations consulted for input into the research).

Further information on the wildflower industry was obtained through the Australian Bureau of Statistics, with nursery and cut flower industry data available through ABS Catalogues 7113 (Agriculture, Australia) and 7113.5 (Agriculture, Western Australia) and 7121.0 (Agricultural Commodities, Australia).

Through this process a broad perspective of the physical (environmental) and economic or agricultural nature of the wildflower industry was obtained.

Following the collation of this background information, a database of wildflower growers of the Great Southern and South West Regions was compiled, using

snowballing techniques¹ to attempt to identify the majority of operations. It is important to note that the organisations currently working with wildflower growers within the study area were *unable* to provide members' contact details, other than those of the executive members of the groups with which the Department of Agriculture and Flowerswest were working. This was due largely to privacy reasons, ensuring that the integrity and relative confidentiality of member lists were maintained by the 'owning' organisations. This restriction proved an obstacle which had to be overcome in order that the research program could progress. Although this initially proved a hindrance, the policies of the organisations supporting the research had to be adhered to and respected. It should also be noted that there is no list of *all* cut flower growers in WA (Department of Agriculture 2001), indicating that other studies too may also have inadvertently missed wildflower producers in the study area.

Media releases and publicity on the project resulted in contact being made by some growers with the researcher. Executive members of the relevant wildflower organisations were able to share required information in some instances. As the research program progressed, numbers of growers on the self-developed database equated roughly to the total number of growers known to the Department of Agriculture (Robinson 2000) and it is assumed, from cross-referencing with growers during the interview phase, that the majority of growers within the study regions appeared on both lists.

The database developed by the researcher was continually updated as growers previously unknown to the author were referred. A mail-out to the 24 local government authorities within the study area proved useful, with industry contact names offered and in-principle support given (in writing) from 54% (13 of 24) of the shires contacted. Tourist associations/bureaux, Telecentres, Business Enterprise Centres, exporters/wholesalers, florists and other relevant organisations within the study area were also contacted and asked to provide links to wildflower growers and wildflower tourism operators in their regions. In total, 167 letters to associated organisations potentially holding knowledge of the wildflower industry were distributed, with each letter providing an overview of the research, requesting information and seeking possible contacts.

¹ *'Snowballing' occurs where research participants identify other potential participants, who in turn identify further individuals or organisations for consultation.*

Other sources of wildflower grower contact data included the Yellow Pages and local community and tourism directories, in addition to word-of-mouth. Notices placed in newsletters of Flowerswest, the South West Development Commission and the Wildflower Society also proved useful, with a number of responses received from growers and other interested parties.

It should be recognised that not all industry participants are members of grower organisations like Flowerswest, or are known to the Department of Agriculture (Brown 2001). For this reason, snowballing techniques were implemented and various methods of identifying and cross-referencing industry actors were seen to be vital if a representative cross-section of the industry was to be accessed for the study.

Similarly, CALM was not able to provide contact details for their licence holders (pickers). However the department did assist greatly by agreeing to apply address labels to envelopes prepared by the researcher to be distributed to bushpickers within the postcode range of the study area. This was in return for access to summary information from the picker survey, providing previously unavailable demographic information to the licensing organisation.

Promotional activities undertaken within Stage One that contributed to the development of the relevant databases included media releases and promotion of the study via internet and email notices. Electronic methods were successful in obtaining links to a number of growers and wildflower tourism operators. Analysis of media releases (local state and national) to identify trends and issues related to land use, agriculture and the regions' wildflower industry was also undertaken.

Face-to-face and telephone interviews were conducted with representatives from across the regions who were involved, in some way, in new industry developments such as diversification or the wildflower and tourism industries, at an officer level – for example, representatives working for a State Government department (see Appendix A for a list of organisations consulted). Information gained in this way contributed to the researcher's initial understanding of the industry and assisted in the compilation of the industry contact lists. Furthermore, these contacts enabled the profile of the researcher to be built within the greater industry, establishing a level of credibility which proved to be essential for the research to be accepted and successful.

The end result of these activities was the development of a comprehensive list of growers, marketers, tourism companies and exporters involved with the South West and Great Southern wildflower industries. Where possible, available details, such as, for example, size of operation and key markets, were also included in the initial database. All personal and business information was kept, and remains, confidential, with aggregates or non-identifying quotes used where required in this thesis and in associated reports.

3.3.3 STAGE TWO – WILDFLOWER INDUSTRY RESEARCH

The second stage of the research process commenced with introductory letters and phone calls to people on the grower list, followed by the development, piloting (with trial surveys and interviews) and distribution of two distinct written surveys which were distributed to growers and pickers respectively. The development process for both surveys is discussed below. Both surveys were followed up, where requested by participants, with in-depth interviews aimed at securing more qualitative information about the background and role of the respondents within the wildflower industry. The experience of these organisations with previous industry research proved very valuable. However, the experience of the grower survey process and comments was considered in the development of the picker surveys. In particular, and on the advice of industry support staff/development officers, the picker survey was substantially reduced in size and scope compared with the grower survey. This was in part due to assumptions made by the industry support staff/development officers regarding a lower level of literacy amongst pickers as opposed to growers. Wildflower producer survey templates are provided in Appendices B and C.

Due to the small number of known producers and the intention to approach them all, sampling techniques were not required and thus not utilised. The survey questionnaires were, however, initially piloted with six growers and two pickers for feedback, with advice also being provided by industry support officers. Minor changes were made to the questionnaire following the piloting process. Given the relatively small size of the industry, a (voluntary) census-style approach to the questionnaire distribution was undertaken. All known pickers and growers were subsequently sent the relevant surveys.

The two surveys were distributed utilising the researcher-compiled database of growers, and to Crown Land bushpickers through CALM's "Commercial Purposes"

licensing system. This system requires that all licensed wildflower and foliage pickers of native Western Australian plants must forward quarterly returns on volumes and species picked (see the industry synopsis in Chapter Four for further detail).

It should be noted here that the differentiation process was not exclusive – some growers who also hold Commercial Purposes licenses through CALM would have received both questionnaires. (This was unavoidable as the researcher was unable to filter the surveys distributed through CALM, due to the confidentiality requirements of this State Government agency preventing researcher access to the database). Similarly, introductory letters sent to growers prior to the grower survey distribution were unable to be distributed to pickers (due to the one-off opportunity to utilise CALM's picker database occurring when the surveys were distributed), hence the picker survey would have been received 'unannounced' by many pickers. The response rate for the picker survey was comparable with those of previous surveys undertaken by CALM (Rohl 2002), and, as such, it was difficult to determine if the 'unannounced' nature of the questionnaires affected response rates.

The use of the written questionnaires was undertaken in conjunction with telephone or face-to-face interviews, either as an alternative to, or to complement, the written response, for both surveys. The choice of methods was thus given to the respondent (with the survey distribution) in order to maximise opportunities for response. The interviews were undertaken to clarify information already provided and to secure further data and contextual information regarding the answers provided where written surveys were also completed. The written surveys, in particular the open-ended questions, assisted in identifying themes and topics which were later investigated by the researcher and, where appropriate, were used as discussion points in interviews. This information also provided a basis for responses and follow-up with the industry partners, whose interests included the identification of industry issues which fell within their respective statutory obligations and roles.

Human research ethics approval was obtained from Curtin University prior to the commencement of the questionnaire distribution and interviews. As part of this approval process, prior to each interview, participants endorsed a *consent form* which provided written approval for data collected to be utilised in the doctoral research project; acknowledged the confidentiality of the responses provided; and emphasised their voluntary participation and ability to withdraw from the research at

any time. Duplicate copies of the consent forms were provided to the research participants.

3.3.3.1 QUESTIONNAIRE CONTENT AND DISTRIBUTION PROCESSES

GROWER SURVEY

Using the snowballing techniques described earlier, survey questionnaires were posted to 65 wildflower cultivating businesses within the study regions. This number compared favourably with the 65 growers known to the Department of Agriculture, although it has been recognised that there is 'a couple' of growers who were not on DAWA records or involved in recent DAWA surveys (Brown 2001).

It is assumed that the overlap between the Department of Agriculture database and the one developed through this research process was significant, since there was no indication from within the industry to suggest that many growers had been missed. Cross-referencing with suggested contacts from other growers (via the written questionnaires and interviews) indicated that a broad coverage of industry representatives was achieved. Appendix B contains a copy of the questionnaire, as distributed with reply paid envelopes to the growers.

The survey questionnaires for growers and pickers contained a number of questions classifiable into three themes (after Parfitt (1997)):

- 1) Data which classify people;
- 2) Data which relate to the behaviour of people; and
- 3) Data which relate to attitudes, opinions and beliefs.

The grower survey contained 43 questions, grouped as follows:

Section One, questions one to five related to basic demographic and location information, such as age, gender and postcode. Questions six through to ten focused on a self-assessment of the recipient's motivations for and degree of participation in the wildflower industry, and included questions regarding previous postcode and employment. The purpose of these questions was to gain an insight into the background of participants, including an assessment of their 'newcomer' or existing farmer status.

The second section of the grower survey addressed the individual's wildflower business, including business and property size, time in the industry, part-time or full-time status in relation to wildflowers, income, and succession planning.

The third section of the questionnaire related to the broader wildflower industry, and sought the recipient's opinions on impediments and supporters. This section also included a request for advice for potential new entrants to the industry, and was particularly important for informing the actor-network analysis.

Section Four was comprised of questions relating to the recipient's attitudes towards, and opinions of, wildflower tourism opportunities for the individual business and the industry.

Finally, Section Five of the grower survey addressed issues of lifestyle – including their perceptions of the wildflower industry lifestyle implications (prior to their entering the industry), and future lifestyle goals. The questionnaire concluded with a query regarding other industry participants (to contribute to the snowballing process), and sought general comments on issues relating to the wildflower industry.

Once the survey had been piloted and refined, introductory letters, outlining the research and its goals, were sent to growers approximately one month prior to the distribution of the written questionnaire. While some respondents had already become aware of the research project through the researcher, Flowerswest, the Department of Agriculture, the Wildflower Society or the South West Development Commission, this was the first contact for others. Some recipients responded with emails or telephone calls to obtain further information on the project or to request an interview rather than a formal, paper questionnaire, while others indicated their choice not to participate. Results from the survey are provided and discussed in Chapters Five, Six and Seven.

The distribution of the questionnaires was timed to coincide with a relatively quiet time of the year in terms of wildflower cultivation and seasonal requirements (June/July 2001), in order to maximise potential response rates. This timing was suggested by industry support agents. Growers were asked to respond within a month of receiving the survey. Reminders were distributed at the conclusion of the initial period. Stamped return envelopes were included, along with researcher contact details

Upon receipt of the written questionnaires, growers indicating a willingness to be interviewed were contacted and interviews scheduled accordingly. As noted earlier, interviewees were asked to sign a consent form which outlined the proposed use of the research information, and their right to withdraw at any time. Information obtained through the interview process was combined with the questionnaire data, to provide the basis on which the analysis of this research is being undertaken. Reminders were sent to growers five weeks after the initial questionnaire distribution.

With the combination of grower surveys and interviews, a 'useable' response rate of 43% from the cultivation industry was achieved. This is further discussed in Section 5.1.

Data and discussion on results and analysis of the grower survey can be found in Chapter Five through to Chapter Eight.

PICKER SURVEY

A number of agency officers and some industry players involved with wildflower production and marketing suggested the full survey, as distributed to growers, may be too comprehensive and confusing for many pickers. Poor literacy amongst pickers was commonly cited as the main reason for this concern, and, although this was unsubstantiated, it was a consideration in the development of the pickers' questionnaire. The survey developed specifically for pickers was thus confined to a brief (front and back of an A4 page) questionnaire targeting the main foci of the research project, at the suggestion of a CALM officer in regular contact with the picking industry.

Again, industry officers provided useful advice and suggestions in relation to the development of the pickers' survey, although the opportunity to distribute a trial version to a sample of pickers was not available since access to picker contact details was not available. A copy of the pickers' survey is attached in Appendix C.

The wildflower pickers' survey, as with the growers' survey, requested information on demographics and locality; time in the industry; perceptions on and attitudes towards wildflower picking and the wildflower industry; and lifestyle and general issues affecting wildflower picking. The questionnaire format, as noted above, was much simpler than that distributed to wildflower growers.

Licences issued for cultivation on private property in 1999/00 totalled 195 for the South West and Great Southern Regions, with 139 “Commercial Purposes” licences issued for Crown Land in the same area over the same period (Rohl 2001). This does not equate to the number of wildflower picking businesses in the Regions since licences are issued to individuals rather than firms. (As the survey would later show, many wildflower pickers operate in conjunction with other family members, for example, husband/wife teams).

With support from CALM, 133 surveys were distributed to residents of the study regions who hold licences to pick flowers and foliage or collect seed from Crown and Private land. This occurred in July 2001. Unfortunately, CALM was unable to differentiate from their database which licence holders were pickers or seed collectors, since the one licence covers both activities. Consequently, surveys were sent to all those within the South West and Great Southern post-code ranges. Six survey recipients later contacted the researcher to decline involvement because their activity related to seed collection only.

It should be noted that the opportunity to send follow-up notices to pickers was not available due to a lack of access to actual address information. This may account for a useable participation rate of 29.3%, compared to 43.1% achieved with the grower contact requests (survey and interview). (Further information on participation rates is contained in Table 5.1). Consultation with the Department of Conservation and Land Management indicated this was not a disappointing result, with a response rate of 34% achieved in a survey of wildflower pickers conducted by CALM within the twelve months prior to this current survey being distributed (Rohl 2002).

The pickers’ questionnaire provided an opportunity for the participant to provide their contact details. Those who indicated a willingness to participate further were contacted and interviewed, either in person or over the telephone, to expand on answers provided in the written questionnaire.

3.3.3.2 GROWER AND PICKER INTERVIEWS

The purpose of conducting interviews as a follow-up to the distributed questionnaires was to obtain further qualitative information regarding the participation of growers and pickers in the wildflower industry. The interviews enabled clarification of unclear responses in the written surveys, the securing of

more detailed information from respondents, and the ability of participants to raise issues which the questionnaire did not anticipate. As Fetterman (1998) describes, interviews explain and contextualise what the researcher sees and experiences.

The majority of grower and picker interviews were conducted across the winter months of 2001, upon receipt of written questionnaires or other forms of requests for interviews (for example, through email). The form undertaken was that of the semi-structured interview: the written questionnaire provided a guide for the researcher, while simultaneously allowing the participant prior understanding of the type of information required.

The approach taken involved informal, in-depth interviewing, in which the sequence and wording of questions were not pre-determined, in order to tailor each interview to the needs of the interviewee, in a manner and form which suited the individual and which could be modified in situ as the responses from participants shaped the direction of the interview. A succinct overview of the rationale behind informal, semi-structured interviews is given by Minichiello et al (1995):

An interview guide or schedule is developed around a list of topics *without* fixed wording or fixed ordering of questions. The content of the interview is focused on the issues that are central to the research question, but the type of questioning and discussion allow for greater flexibility than does the survey-style interview. ...this may reduce the comparability of interviews within the study but provides a more valid explication of the informant's perception of reality. (Minichiello *et al.* 1995: 65).

The approach differs significantly from formal or structured interviewing, in which the interviewer already has idea of what they want to know, questions are standardised and may be dominated by closed-ended questions, such as in a formal survey (Eyles 1988; Yin 1994; Minichiello *et al.* 1995; Valentine 1997). A formal approach to the interviews was seen as unsuited to the current research project, as it failed to enable the flexibility to delve into the varied histories and motivations of wildflower industry participants.

The interviews were conducted in a variety of locations, generally on property. The interview setting may have been over coffee at the kitchen table, or in a dusty farm vehicle while touring plantations. The site and manner of the interview was guided

by the participant. Generally, this enabled the grower to participate “at their leisure” – in their ‘space’, and on their terms. The aim of this was to ensure the respondents were able to engage in conversation in a comfortable manner, and be at ease with the interview process, and to talk about their industry involvement in their own words (Eyles 1988). This was the intention of the interview form adopted, enabling “a sensitive and people-oriented” approach, “allowing interviewees to construct their own accounts of their experiences by describing and explaining their lives in their own words” (Valentine 1997: 111).

Interview notes were taken, and transcribed upon return from the interview. A conscious decision was made not to record interviews. Given the potential for ‘commercial-in-confidence’ information to be raised in the discussions, it was felt that being recorded may prevent honest and open answers from respondents. This was a concern and the choice of not recording the interviews was confirmed and supported by a number of industry development officers. In addition, as many industry participants were critical of the various roles of government in relation to the wildflower industry (this was noted from early discussions, piloting and written questionnaire responses), this added to the perception that a recorded approach to interviewing may restrict openness in responses.

Prior access to the written questionnaire (via the survey mail-outs) made possible a semi-structured format, providing a guide for both the interviewees and the interviewer, and preparing both for possible prompts, should a silent period be encountered during the interview process.

Furthermore, it should be noted that use of the interview method was not limited to the growers and pickers involved with wildflowers. As part of the broader actor-network approach in which the researcher aims to understand the relationship between actors in their networks, it was essential to conduct informal interviews with industry development officers and support staff. Interviews with such individuals were always unstructured, but were constructed so as to gauge their understanding of the networks and relationships operating, and of how these may affect the industry (and its relationship with tourism).

Wildflower wholesalers and exporters were also consulted, with a number choosing to participate in the research. Informal, unstructured interviews were chosen for this process. Notably, a number of ‘gatekeepers’ were identified by industry development officers and support staff, and these individuals generally fell in the

category of wholesalers and exporters. Gatekeepers are described as influential persons who have the ability to withhold information or access to people (Cook 1997; Valentine 1997). Ironically, while there were a small number of individuals who could be classed as gatekeepers in the wildflower industry, it was notable that the gatekeepers acted in two distinct, but not mutually exclusive, ways:

- 1) The gatekeepers protected 'their patch' and were somewhat sceptical of the research being undertaken (and thus required convincing!). This was understandable given the commercial-in-confidence nature of a proportion of the information being sought. However, a lot of the protection related to an industry-wide scepticism with government, and government-sponsored research (as this was). A concern that 'big brother was watching' was apparent across all production and exporting aspects of an industry in which many participants already felt over-regulated. This issue will be discussed in later chapters.
- 2) The gatekeepers (as exporters and wholesalers) acted in a 'parent-like' way in supporting, protecting and defending their suppliers, particularly in relation to wildflower pickers. (This is discussed further in Chapter Five).

Table 5.1 in Chapter Five, supported by Appendix A, provides an overview of the numbers of interviewees consulted across the various sectors of interest relating to wildflowers and wildflower tourism. It should also be noted that some participants were interviewed or consulted on more than one occasion.

3.3.3.3 'OTHERS' AND OTHER RESEARCH ACTIVITIES

Throughout the research process, as a result of media coverage and word-of-mouth, a number of 'other' wildflower industry participants contacted the researcher, wanting information on the study or requesting participation in it. This group included wildflower producers not resident in the South West and Great Southern. Information obtained from this sector has been incorporated because it provides valuable background and supporting information. Where data obtained from this group are included in this thesis, it is noted accordingly.

Furthermore, as part of the participant observation elements adopted in this research program, other actions of observation and data-gathering techniques included the following:

- Participation in regional and national wildflower forums and conferences;
- Membership of local agricultural societies and informal rural networks, which provided access to farmer and other landholder perceptions of, and responses to, agricultural industry restructuring and rural change;
- Participation in regional and state-wide agricultural and rural change symposia and other events, particularly in relation to industry restructuring (for example, in the dairy industry in the study area); and
- Observation as a “wildflower tourist” in activities aimed at this market.

All of these activities assisted the engagement in, and with, the wildflower industry and the broader rural sphere in the study area.

3.3.4 STAGE THREE – DATA CLARIFICATION AND REFINEMENT

Stage Three in the research program enabled the data gathered to be put together and confirmed, critiqued or complemented as necessary. Information dissemination to participants was seen as a vital step in contributing to the desired outcomes of the industry partners sponsoring this research. Furthermore, reporting back to those who were willing to become involved was an essential component of the mutual commitment between researcher and participants, and was integral to the success of the study.

As a direct result of early feedback from growers and pickers involved with this research, it became necessary to develop a method for making information and reports prepared during this study available to industry participants. At the time the research was being undertaken, a comprehensive resource or website identifying and linking wildflower information of relevance to the southern corner of Western Australia was unavailable, although options to develop such a resource were under consideration (Brown 2001). Although developing a centralised information source was beyond the role of this researcher, meeting the information needs was seen to be important in ensuring that the participants of the study could see opportunities for themselves and the industry from the research, thus providing some answers to the inevitable “what’s in it for me?” questions associated with participation. Many participants suggested a “one-stop” website resource, which was also being proposed by Flowerswest.

Until such time that a comprehensive, 'one-stop-shop' for industry information could be developed, it was deemed essential to provide feedback and results to participants. To this end, industry officers from CALM and the Department of Agriculture played a core role, promoting and utilising information from the study, as it became available.

The rationale for adopting this approach stems from the experience and history of the researcher (in agricultural extension). Milbourne (2000) argues that many rural studies reports have been 'written for, and consumed by' academic audiences, and as a result the applied success of such research has been limited. Within the context of this research, the lay reporting of the findings was deemed essential, largely due to the need to report to the sponsoring organisations and to the commitment given by the researcher to the participants, particularly during the interview phase.

3.3.5 STAGE FOUR – TOURISM INDUSTRY RESEARCH

In order to address, from a demand perspective, the tourism opportunities related to the southern wildflower industry, a number of techniques were implemented. Snowballing techniques were again used to compile a comprehensive list of tourism industry operators who may have had an interest in, or an opinion on, the potential for (increased) wildflower tourism. The snowballing techniques included written letters of information request to all tourist bureaux in the region, seeking contact details for tour operators and, where possible, information or opinion on wildflower tourism demands. Tourism industry contacts were also obtained through the perusal of tourism brochures available across both regions, and through contacts provided by the Western Australian Tourism Commission (WATC). A database of potential industry contacts was derived by noting any tourism operators in the study area who included the word 'wildflower' in the marketing materials (both electronic and print). This technique proved fruitful, with a database of 72 charter tour operators, farmstays and accommodation facilities, and tourism destination operators developed for both regions.

The tourism survey questionnaire was distributed in mid-2002. Response rates and findings are detailed in Section 5.3.

Further (informal) tourism information was gathered via participation in tourism industry conferences and events across the South West and Great Southern

Regions, and at a State level. This provided access to tourism operators for informal discussions related to the wildflower industry and rural tourism in the region.

3.3.6 SUMMARY OF RESEARCH TECHNIQUES APPLIED

The array of research techniques applied to this case study was thus broad, and aimed at gaining cross-sectoral insight into issues of rural change and tourism development in relation to the wildflower industry. Desktop assessment, observation, and surveys and interviews of a cross-section of persons involved with the wildflower industry were conducted. The research findings are presented predominantly in Chapter Five, followed by analysis in Chapters Six, Seven and Eight. Chapter Four provides an overview of the wildflower industry and the study area, based on the findings of the initial review undertaken as the first part of the study methods.

3.4 RESEARCH IMPEDIMENTS

As is discussed throughout the remaining chapters, a number of issues affected the success of the research methodology in obtaining the required data to develop this thesis. These included:

- 1) **Access to grower and picker lists.** As noted earlier, the Departments of Agriculture and Conservation and Land Management were unable to provide grower and picker contact lists (respectively) due to privacy reasons. Without a direct source of data with which to cross-reference the questionnaire distribution list, it is difficult to be certain of adequate industry coverage. However, utilising other surveys directed to the same audience, it was possible to gauge a reasonable estimate of the numbers of industry participants, and to assume that there is a significant amount of congruency when identified numbers are similar.
- 2) **Entrance to the industry.** Gatekeeper issues, as noted earlier, were managed where it was possible. This necessitated trust building and justification, to the satisfaction of the gatekeepers, that this research was both valid and non-discriminatory.

- 3) **Distrust of the State.** For various reasons, as described in later chapters, many industry participants were weary of government involvement in their industry. Some respondents identified historical issues with the two main agencies involved (Departments of Agriculture and Conservation and Land Management). This affected response rates and, at times, created an air of cynicism and distrust towards the research program and its objectives.
- 4) **Difficulty with anonymity.** Due to the small size of the industry, it is not difficult for “anonymous” comments to be (correctly or incorrectly) assumed to be from certain actors, particularly where those actors may be vocal about one or more issues. This risk is managed in this thesis with caution.
- 5) **Industry staff turnover.** During the period of the study development and data collection, Flowerswest, the industry body in Western Australia, had three separate Executive Officers. This affected the research program, as it meant that the original, supportive Executive Officer had moved on by the time the research program commenced. Thus, it was necessary to explain, to two new officers at different times, the purpose and outcomes of the research. This was particularly difficult given that the new officers had no ownership of the project, and it was not considered a high priority for their respective new work plans.
- 6) **Scepticism of qualitative research methods.** Interestingly, throughout the research program, there appeared to be an element of cynicism towards the qualitative research program, from wildflower industry researchers with scientific (positivistic) research backgrounds. This was noted and managed accordingly, with an acknowledgment that this is not an uncommon occurrence in social science research, and must be managed with rigorous research processes.

Other issues associated with managing and analysing the data are described below.

3.5 VALIDATION OF RESULTS

Determining whether the research has measured what it intended to (that is, its validity) and confirming the reliability of the data obtained was a further step in the research process. In qualitative approaches, the relationships between theoretical constructs and empirical observation must be validated. As Maxwell (1998) writes,

the qualitative researcher must often attempt to rule out threats to validity after the research has begun, using evidence from the research itself to rule such threats 'invalid'. This falls within the overall notion of the iterative study process, whereby the progress of the research is continually reviewed and amended as needed – Crang refers to this process as “analytic induction” (1997: 188).

Assessing the statistical validity (as used in quantitative research) was largely inappropriate since this case study was undertaken using a census of known growers and pickers. Furthermore, the numerical validation of results can be difficult when using qualitative techniques. In ethnography, of which some elements have been adopted in this research program, “the validity of the research is assessed with reference to the research topic and does not follow exclusively abstract validation procedures such as those adopted in quantitative research” (Hughes *et al.* 2000). As a result, research conclusions are embedded in the empirical material rather than developed using external procedures or generic analytical tools. This applies to a broad range of qualitative research designs (see also Sarantakos 1993).

Maxwell (1998) describes threats to validity in qualitative research. Bias, it is noted, refers to the way data collection and/or interpretation is affected by the values and beliefs of the researcher. Rather than attempt to avoid any bias (which is impossible given human subjectivity and the nature of the qualitative research methods adopted), the process instigated throughout this project has involved attempting to identify and understand the biases which do exist. This follows closely the ethnography approach described earlier, acknowledging the impact of the researchers' values upon the research process. It is further supported by the work of Eyles (1988), who acknowledges that ethical questions about the role of the researcher and purpose of the research need to be addressed.

The aim is to eliminate researcher variability from causing unwanted variability in the outcomes. Maxwell (1998) identifies the need for the researcher to understand how they may influence what is being said by the interviewee, and how this affects the validity of any inferences that can be drawn from the discussion. Furthermore, the participants themselves may influence the outcomes according to their own agendas:

...members of the research community may well be just playing on their expectations of your expectations to wind you up, to provoke a reaction and enjoy themselves at your expense ... So you should always be

suspicious, then, of why you understand what you understand within the contingent, intersubjective, time-spaces of your fieldwork. (Cook 1997: 140).

The theme, quite clearly, is accepting the subjective influence of the researcher, and of the researcher's responses to different situations across all areas of the research process, and being open to recognising the impact of these upon the findings.

An additional view worthy of discussion is that of Lincoln and Guba (1985) as summarised by Sarantakos (1993). According to Sarantakos, Lincoln and Guba suggest that qualitative researchers need to show methodological excellence rather than traditional validation. Professional, accurate and systematic research is seen to be the key, with concern directed to methods and processes, and with support provided by triangulating data with other studies and available information.

3.5.1 TESTING THE DATA

Reliability considerations in the data gathering also require discussion. Reliability relates to the question "can the results be replicated?" (Parfitt 1997). Triangulation, or using other sources of relevant information to confirm data and support outcomes (Valentine 1997), was the method adopted throughout this project to confirm and/or support the findings.

Opportunities for triangulating data obtained through this research project came largely through the support of the sponsoring organisations (South West Development Commission and the Department of Agriculture) and others including CALM, the Great Southern Development Commission, the Western Australian Tourism Commission and Flowerswest, as well as the participants themselves. The verbal advice, specific data and reports obtained from the support organisations played a valuable role in building a bank of data to support, (or otherwise), information obtained from the surveys and interviews. Other relevant publications were also used to triangulate the research results where required.

Further triangulation opportunities arose due to the multiple approaches taken to this research (including interviews and written questionnaires). The various methods undertaken revealed similar results, thereby indicating the different methods did not affect the data obtained.

3.6 ANALYTICAL APPROACHES

Chapters Six, Seven and Eight present, respectively, discussion on the data collected; the position of this data to rural change and tourism development theory; and the implications of these considerations upon the future of the industry. The actor-network analysis presented in Chapter Six informs the multifunctional transition discussion in Chapter Seven, with both contributing to the discussion on industry futures.

As a first step, data obtained through the grower and picker surveys and interviews were coded, in order to differentiate common and repeated issues or concepts, and those which may have been relevant for a small number or an individual. The purpose of the coding was to assist with 'making sense of the material', but not with the content analysis (Crang 1997). Emic (informant-generated) and etic (researcher-generated) codes were both used. Care was taken to ensure that the specific, qualitative commentary provided by the study participants was not necessarily lost in any generalisation.

Furthermore, the aim of analysis in participant observation or ethnographic research is to construct an accurate conceptual framework about what is happening in the group under study by developing and testing ideas (Fetterman 1998). Analysis is undertaken concurrently with the research, formulating and moulding hypotheses throughout the process and enabling flexibility in the ongoing research techniques (Cook 1997; Fetterman 1998). By commencing and continuing the interpretation of the results as the study progressed, the research was able to adapt research strategies and techniques accordingly. In particular, this permitted adaptation of the informal interview approach and the degree to which the researcher participated in industry activities. This also enabled the development of progress reports and relevant articles for the sponsoring partners and others with an interest in the research data. Ongoing analysis was thus vital to the publication and application of the results throughout the term of the research, and for not limiting the opportunities for applying the results until the end of the work.

Ongoing and final analysis was undertaken by considering the themes and issues emerging within the agricultural and rural change contexts, and any other contexts which emerged. The actor-network approach proved useful here, by providing a framework for determining patterns and structures of meaning (Crang 1997) which

would help to inform the research questions about rural change processes and linkages between the wildflower and tourism industries.

3.7 CHAPTER SUMMARY

The purpose of this chapter was to outline the approach taken and the methods adopted throughout this research project. The details of the methods emerge throughout Chapters Five, Six and Seven, as the research results are presented, considered in general terms, then analysed in relation to the multifunctional transition.

Chapter Four provides a summary of the wildflower industry at the time of the research, in order to contextualise the industry and the research program.

CHAPTER FOUR – THE WILDFLOWER INDUSTRY

4.0 CHAPTER OVERVIEW

The purpose of this chapter is to provide a synopsis of the wildflower industry in southern Western Australia. The chapter draws on both secondary data and fieldwork undertaken during this research program to develop an overview of the industry. Issues within and challenges for the wildflower industry at local, regional, state and national level are addressed, with some reference to international influences where appropriate.

The chapter commences with a contextual description of the study area, followed by discussion on the wildflower industry, its history and composition in the South West and Great Southern Regions of Western Australia. State-wide and national wildflower industry scenarios are also provided in efforts to provide an accurate overview of the status of the industry during the study period (2001-2003). For additional information, the post-script at the end of the thesis includes a summary of significant changes within the study area and the wildflower industry since the completion of the empirical research.

4.1 STUDY AREA

4.1.1 SOUTH WEST REGION

The South West Region covers an area of 23,970 km², and consists of twelve local government authorities – the Shires of Harvey, Collie, Dardanup, Capel, Busselton, Augusta-Margaret River, Nannup, Manjimup, Bridgetown-Greenbushes, Boyup Brook, Donnybrook-Balingup, and the City of Bunbury.

Figure 4.1 provides further detail on the localities contained within the South West Region, including local government boundaries.

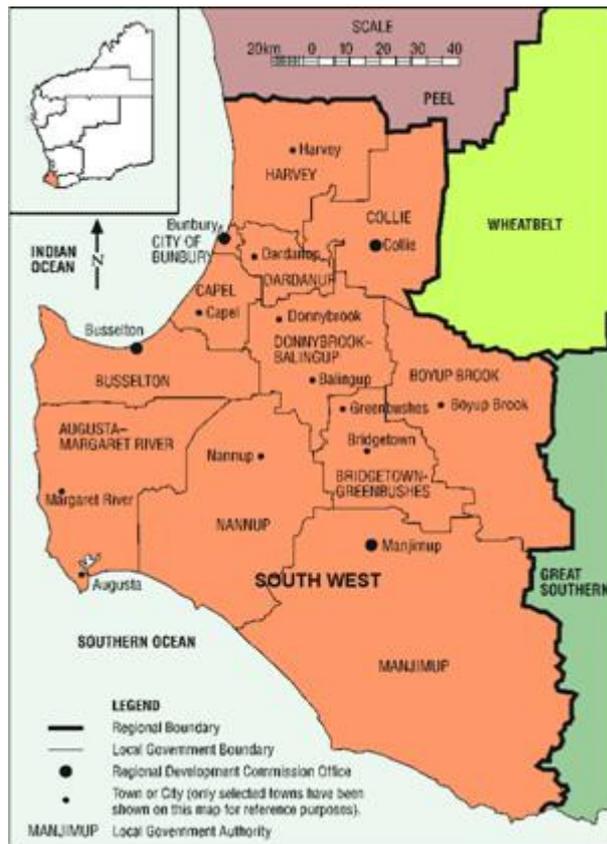


Figure 4.1 South West Region

(Source: Department of Local Government and Regional Development undated (a))

The South West Region's population grew from 110,000 in 1995 to 130,000 in 2001 and 141,000 in 2005, and is expected to continue to grow to approximately 153,000 by 2015, and 175,000 by 2021 (South West Development Commission 2005; Department of Local Government and Regional Development 2006a). Mining, manufacturing, tourism, agriculture and retailing are the major industries present in the region. Gross Regional Product in the South West was \$6.8 billion in 2004/05, or 6.7% of the gross product for Western Australia (Department of Commerce and Trade 1999a; Department of Local Government and Regional Development 2002, 2006a).

The value of agricultural production in the South West Region peaked at \$600M in 2002/03, with horticultural crops (predominantly vegetables and wine grapes) providing the largest contributions to this figure. Cut flowers contributed \$3.8M to the South West economy in 2003/04 (Department of Local Government and Regional Development 2006a).

Estimated tourism expenditure in the South West Region for the period 2001/02 and 2002/03 was approximately \$550M per annum, with the bulk of this resulting from domestic visitors (Department of Local Government and Regional Development 2006a).

4.1.2 GREAT SOUTHERN REGION

The Great Southern Region of Western Australia comprises the Shires of Woodanilling, Kojonup, Katanning, Broomehill, Tambellup, Cranbrook, Plantagenet, Denmark, Gnowangerup, Kent, Jerramungup, and the City of Albany, as depicted in Figure 4.2:

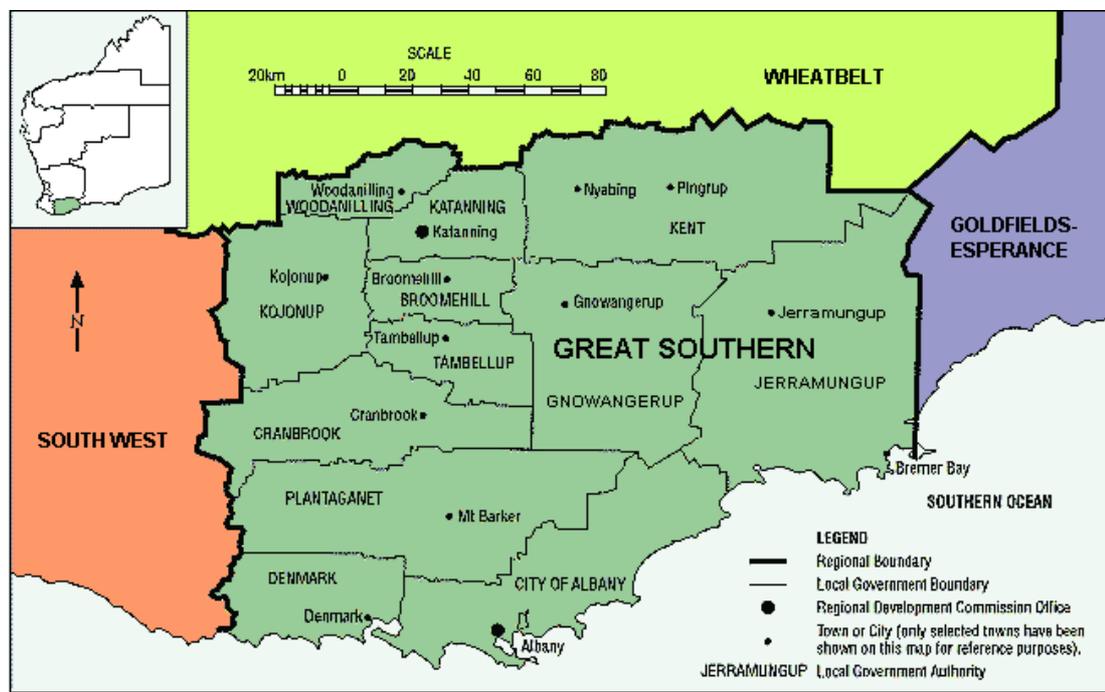


Figure 4.2 Great Southern Region

(Source: Department of Local Government and Regional Development undated (b))

The population of the Great Southern grew from 49,000 persons in 1995 to 54,000 in 2001, and has remained relatively stable since that time (Department of Local Government and Regional Development 2006b). Population forecasts predict a steady increase to approximately 63,000 by 2031 (Department of Local Government and Regional Development undated).

The Region covers 38,917 km², with agriculture, tourism, plantation forestry, fishing and the retail industry providing an economic base for the area (Department of Commerce and Trade 1999b; Department of Local Government and Regional Development 2002). Gross Regional Product in 2004/05 was an estimated \$2.3 billion. Agricultural production was valued at \$800M in 2003/04, with the bulk of this value arising from cereal cropping and livestock industries. Viticulture contributed \$26.8M to the region's economy during the same period, increasing to \$40.1M by 2005. In the Great Southern, cut flowers, including wildflowers, were valued at an estimated \$5.2M in 2003/04 (Department of Local Government and Regional Development 2006b).

4.2 WESTERN AUSTRALIA'S WILDFLOWER INDUSTRY

The wildflower industry is the term given to the sector comprising growers, pickers and marketers of Australian native *flower and foliage* species and South African species such as *Proteaceae*, *Leucodendron*, *Leucospermum* and *Serruria* (Karingal Consultants 1997; Carson *et al.* 2000; Lim-Camacho 2006). Production is obtained through cultivation (cropping), harvesting of flowers and foliage from State Forest or Crown Land, and harvesting of flowers and foliage from managed stands of native vegetation on private land. The last two mechanisms are collectively known as 'bushpicking' or, alternatively, simply 'picking'.

The wildflower industry in Western Australia has been developing since the middle of the twentieth century, with harvesting of bushpicked flowers being sent for export since the 1970s (Floriculture Market Development Group 1998), and commercial cultivation for export and domestic markets since the 1980s (Cosgrove 1999). Slater and Carson (2003) note that the Australian wildflower industry grew throughout the 1990s due to increasing export demand. However, exports had not increased as fast as expected during the late 1990s. Slater and Carson identify the reason, in part, as an inability on the part of exporters to fill orders with appropriate crops. This sentiment was also noted in the *Senate Enquiry into the Commercial Utilisation of Australian Native Wildlife* (Senate Rural and Regional Affairs and Transport Committee 1998).

CULTIVATED FLOWERS AND FOLIAGE

Cultivation (or artificial propagation) of wildflowers has increased dramatically since the early 1980s but sales on the domestic market have not kept pace with this increase (Horsman 2000). The outcome has been a focus on exporting Australian wildflowers. The 'export culture' which developed in the industry has been described as "generally uncoordinated and dependent on the activities of individual wholesalers and exporters" (Sprigg and Webb 1994: i).

Australian Bureau of Statistics data for the study period indicates the following number of businesses in Australia and Western Australia producing cut flowers or seed:

Table 4.1 Wildflower Producers in Australia and Western Australia

Year	Number of agricultural establishments producing cut flowers or flower seed - <i>Australia</i>	Number of agricultural establishments producing cut flowers or flower seed – <i>Western Australia</i>	Data Source
2000-2001	1073	150	ABS 2000-01 Agricultural Commodities Catalogue 7121.0 (ABS 2002)
2001-2002	945	140 ¹	ABS 2001-02 Agricultural Commodities Catalogue 7121.0 (ABS 2003b)
2002-2003	833	130 ²	ABS 2002-03 Agricultural Commodities Catalogue 7121.0 (ABS 2004)
% Change 2000-2003	-22.4%	-13.4%	

¹ The Relative Standard Error (RSE) for this figure, as determined by the ABS (2003), is equal to or greater than 10% but less than 25%, indicating some uncertainty in confidence in data.

² RSE is equal to or greater than 10% but less than 25% indicating some uncertainty in confidence in data (ABS 2004).

Notable from the above figures is the decline in agricultural businesses indicating cut flower (or flower seed) production activity over the study period. Changes in data collection techniques and the amalgamation of farm businesses may contribute to these changes. The implications of this apparent trend are discussed in later chapters.

A survey of wildflower plantings in Western Australia (Department of Agriculture 2001) identified and surveyed 143 growers across the State who grew Australian native or South African species. This study considered, amongst other things, the plant varieties being cultivated:

Australian native plants totalled 81 per cent of the number of plants grown, with South African plants making up the remaining 19 per cent. Forty two per cent of the Australian native plants were Waxflower, while Kangaroo Paws comprised 22 per cent and Banksia 9 per cent. Sixty per cent of the South African plants grown for export cut flowers were Leucodendron. (Department of Agriculture 2001: 1).

The study cited above notes that two previous surveys conducted in WA estimated the areas under cultivation from 'very limited' information, hence "it is not valid to compare areas or to extrapolate trends in industry development between those surveys and the current survey" (Department of Agriculture 2001: 1). Thus, assumptions of accuracy when utilising existing data cannot be made. However, such data have been used as a guide to inform the present research, with acknowledgement that accuracy cannot be assured.

Of the 143 growers surveyed (state-wide) by the Department of Agriculture, thirty three were located in the Great Southern, and thirty two in the South West. The survey found that a total of 166 hectares were cultivated for these types of flowers in the South West and Great Southern Regions.

BUSHPICKED FLOWERS AND FOLIAGE

Bushpicked native flowers and foliage comprise a significant proportion of Western Australia's wildflower exports. At the time of the research, Western Australia's native wildflower and foliage pickers produced 23.4 million stems per year for export, as opposed to the 15.7 million stems produced from cultivated wildflower operations. Of those 23 million, 19 million stems were cut from public land (Davies

2001). This volume was considered by Davies to be essential to the maintenance of market presence for Australian cut flowers on international markets.

During the period of this study, wildflower pickers harvesting plants indigenous to Western Australia were required to obtain a licence from the Department of Conservation and Land Management (CALM) under the *Wildlife Conservation Act 1950* and the *Conservation and Land Management Act 1984*. This licensing system was established in line with CALM's *Policy Statement 13: Commercial Flora Harvesting* (Department of Conservation and Land Management 1993). CALM's licensing system complied with the regulations and requirements of the Commonwealth Department of Environment and Heritage under the *Environmental Protection and Biodiversity Conservation (EPBC) Act 1999* (Department of Environment and Heritage 2003).

A "Commercial Purposes Licence" was required for the taking of foliage and flowers, and seeds, from State Forest or Crown Land (Rohl 2001). Owners or occupiers of *private* land containing native vegetation require a 'Commercial Producer's Licence' to source flowers, foliage or seed, as do cultivators producing species indigenous to Western Australia. All licensees were obligated to provide annual "returns" to CALM indicating the varieties and quantity of products picked (or grown), and the locations where such products were sourced. The accuracy of the information provided on the CALM returns was widely considered to be questionable (Sprigg and Webb 1994; Reid and Hayler 2001; Rohl 2001), because "many growers do not bother to get a license or do not report accurately" (Reid and Hayler 2001: 15). This inaccuracy is not confined to Western Australia, with Brooks (2001) noting that the Australian Wildflower industry as a whole recognises that available statistics are inaccurate. At the time of the research, the Australian Nature Conservation Agency (ANCA) collected data on bushpicked export product, but this related only to exports, was not considered comprehensive, and could not be reconciled with CALM data (Reid and Hayler 2001).

'Commercial Producers' licences issued for the *cultivation* of Western Australian native plants on private property in 1999/00 totalled 195 for the South West and Great Southern Regions, with 139 'Commercial Purposes' licences issued for Crown Land in the same area over the same period (Rohl 2001). It should be noted that this does not equate to the number of wildflower businesses in the Regions because licences are issued to individuals rather than to firms.

Since the 1980s, a decline in the quantity of bushpicked product and a movement towards cultivation has been noted Australia-wide (Carson 2000; Brooks 2001; Department of Agriculture 2002). However, the industry disputes claims that wild harvested product volumes are declining, because the reporting system to CALM has not been considered to be comprehensive (Reid and Hayler 2001). Australian Bureau of Statistics data indicates that from the period 1995/96 to 1999/2000, the *value* of Western Australia's wild harvested (bushpicked) cut flowers declined from \$6.81M to \$4M (Department of Agriculture 2002). However, precision in these figures cannot be assured given the industry and other (for example, ABS 2003b) scepticism of the accuracy of official data.

4.3 INDUSTRY PRODUCTION

The wildflower production industry comprises three market segments (Karingal Consultants 1997):

- Fresh cut flower and foliage exports
- Preserved (or processed) flower and foliage exports
- Domestic market (fresh and dried) flowers and foliage

Analyses indicate that fresh flowers dominated wildflower exports from Australia during the study period (Brooks 2001; Sutton 2002).

At the time of the commencement of the study, Western Australia exported approximately 70% of Australia's cut flowers and foliage, largely made up of native and South African flora and foliage (Department of Agriculture 2000). The cut flower export market from Western Australia was comprised mainly of Australian and South African native plants, with the domestic market dominated by exotic species (roses, chrysanthemums, carnations etc) (Department of Agriculture 1999). *As such, estimates of the quantum of WA's floriculture exports are taken to roughly represent the wildflower export industry.* There are recognised discrepancies in state-of-origin export figures for Australian wildflowers, since quantities of Western Australian wildflowers are exported via other states, and thus such figures can be inaccurate (Brooks 2001; Sutton 2002). This, however, has little bearing on the outcomes of this research program.

Although exact figures are difficult to determine and available data are flawed (Reid and Hayler 2001), estimates of the value of Western Australian native flowers and foliage suggest that the industry was worth approximately \$17.5 million to the State's economy in 1998/99 (Rohl 2001). This is an estimate of the direct value, and excludes further revenue from wildflower tourism. Revenue from proteas, leucodendrons and other non-Australian species is additional to this. Total exports of cut flowers (predominantly native plants and proteas) from WA were estimated to be worth approximately \$22 million annually at the time of the study (Department of Agriculture 2000), with the total value of the cut flower industry (native and non-native flowers and foliage, and domestic and export markets) estimated by others (Karingal Consultants 1997; Department of Agriculture 1999) to be worth \$40-50 million to Western Australian producers around that time. A more recent review of available data suggested approximately \$15.5M in wildflower products exported from the State in 2000-01 (Western Australian Agriculture Authority 2008). Specific or more accurate data on the value of Western Australia's wildflower industry were not essential for this study, and thus it was not considered necessary to analyse the various industry estimates which abound.

Virtually all estimates of the value of the industry are questioned by various industry sources. As such, exact figures are very difficult to obtain. Obtaining accurate data on the value of the industry was further complicated by changes to Australian Bureau of Statistics reporting at the time of the research. This was compounded by changes to Australian Harmonised Export Commodity Classification (AHECC) recording requirements which were also occurring around the time of the research (Brooks 2001; Sutton 2002). AHECC categorises goods for export, for the purposes of providing information for tariffs, and as such this classification system is not tailored towards the provision of useful information for the industry (Sutton 2002). As a result, official export figures for Australian wildflowers are not easily attainable or, as has been noted, "the categories used to record significant data on Australian wildflower exports are still too crude and needs [sic] revision" (Sutton 2002: 1).

It has also been noted that many exporters are reluctant to provide information on domestic and export markets – "This partly reflects the exporters' view that market intelligence has been built up at some considerable expense to themselves, and they are not prepared to make this information freely available" (Sprigg and Webb 1994: ii). This compounds the difficulties in obtaining accurate data on industry size, and relates to similar reluctances found when undertaking fieldwork for this study –

due largely to the commercial nature of the industry and an unwillingness to share commercial information.

4.4 INDUSTRY ORGANISATION

Wildflower producers in Western Australia were represented and/or supported by various levels of organisation and structure during the study period. The key organizations and their roles are described briefly below.

FLOWERSWEST

The peak industry body for floriculture in Western Australia during the study period was Flowerswest. Flowerswest (also known as Flower Producers of Western Australia Incorporated) emerged from recommendations of the Floriculture Market Development Group (Floriculture Market Development Group 1998) and became an entity in January 1999 (AsOne Consulting 1999). The organisation was formed from the amalgamation of the Western Australian Wildflower Producers Association, Protea Producers Association of Western Australia, and the Green House Rose Growers of Western Australia (Centre for Australian Plants 1999). The Flowerswest Business Plan, developed in consultation with its members at its establishment, noted that

Flowerswest can be viewed as the major industry tool for development of the WA cut flower industry. ...The Organisation is not large enough to do everything that needs to be done to develop the industry. However, it is in an ideal position to facilitate and work with other organisations to achieve results that benefit members. (AsOne Consulting 1999: 3).

Throughout the research program development and the undertaking of fieldwork, Flowerswest staff and members (where possible) were engaged in the development of research questionnaires and provided insight into industry issues. As is discussed in the network analysis later in this thesis, study participants had various (often negative or neutral) perceptions and opinions on the role of Flowerswest. During the period 2000-2002, the organisation had significant staff turnover, affecting its continuity and ability to achieve its objectives. The Executive Officer position, the sole employed staff member of Flowerswest, changed occupancy three times during that period. The combination of staff turnover, grower dissatisfaction

and resource shortages is believed to have contributed to the eventual demise of Flowerswest in 2005.

The research results indicated that not all wildflower producers in the State were members of Flowerswest. Furthermore, bushpickers were also usually absent from Flowerswest membership, for many reasons, often related to membership costs, perceived low levels of picker professionalism (on the part of Flowerswest) and perceptions of Flowerswest irrelevance (on the part of the pickers).

Since the field work for this research program was completed, Flowerswest has ceased to exist and has been replaced by various grower groups, such as the Wildflower Growers of Western Australia and the WA Protea Growers Association (Department of Agriculture 2005). (Further discussion on research and development activities occurring within the wildflower industry since 2002 is provided in the post-script following Chapter Ten).

CENTRE FOR AUSTRALIAN PLANTS

The Western Australia-based Centre for Australian Plants (CAP) was also extant during the study period. The CAP was established by Western Australian wildflower research organisations, including the Department of Agriculture, to “provide leadership in the development of indigenous and non-indigenous plants for Australia’s commercial advantage through the collaboration of industry, research, education and conservation” (Centre for Australian Plants 1999: 9). Interestingly, the genetic research and plant breeding focus of this organisation and its partners, and the associated issues relating to plant breeder’s rights, were regularly raised by wildflower growers as potential impediments to overall industry growth. The issues surrounding this are discussed further in later chapters.

WESTERN AUSTRALIAN FLORA INDUSTRY ADVISORY COMMITTEE

A further industry group affecting the wildflower industry during the study period (2001-2003) and which remains today is the Western Australian Flora Industry Advisory Committee (WAFIAC). WAFIAC advises the Minister for the Environment and CALM on flora industry management in Western Australia. The organisation comprises representatives from flower pickers, flora exporters/dealers, private growers, seed collectors, tertiary institutions, CALM/DEC, the Botanic Gardens and Parks Authority (BGPA), the Department of Agriculture and Food and the Wildflower

Society. WAFIAC's role in the wildflower industry differs from those of the other groups discussed previously, in that WAFIAC advises the regulator, the Minister for the Environment, while the industry groups focus on various aspects of industry growth and development. Environmental sustainability issues are a major focus of the perspective taken by WAFIAC and the Minister to which it reports and makes recommendations.

AUSTRALIA FLOWER EXPORT COUNCIL

At the national level, the Australian Flower Export Council (AFEC) – previously known as the Flower Export Council of Australia (FECA) – comprises “Australian floricultural exporters working together to address industry challenges and present a united focus in the marketing and promotion of their products overseas” (Gollnow 2002). AFEC has a long term commitment to the global marketing of Australian flowers and the improvement of the position of Australia in the international floriculture system.

Interestingly, no participants in the research indicated direct involvement with this Council. This may be an outcome of the small-scale at which the industry participants operate.

4.5 GLOBAL FLOWER MARKETS

The positioning of local wildflower producers in global markets requires some consideration. The global flower market in 2000 was estimated to be worth \$US7 billion, with the Australian production valued at less than 1% of the global flower trade (Gollnow 2002).

As discussed earlier in this chapter, the bulk of Western Australia's wildflower production is exported. In total, up to 95% of Australia's flower exports are Australian natives or proteas (Gollnow *et al.* 2003). However, while the global market for Australian native flowers and foliage grows, it is estimated that Australia only supplies approximately 10% of this international market, and falls behind in competition with Israel, and several South American and African nations (Karingal Consultants 1997; Gollnow *et al.* 2003). Lower costs of production or out-of-season production provide these areas with market advantages with which Australian producers must compete.

Parlevliet and Storer (2004) differentiate the market requirements for cutflowers as follows:

- Display flowers – large, striking, colourful flowers, such as *Banksia* and protea varieties, which attract comparatively higher prices.
- Focal fillers – including rice flowers, some wax flowers and Leucodendrons.
- Fillers – including baby's breath and wax flowers, designed to provide a colour contrast to the display flowers.
- Foliage – low cost plants used to 'bulk up' a flower arrangement, providing colour contrast and a 'back drop' to other flowers. Many Western Australian bushpicked foliage falls within this category.

As will be discussed in more depth in Chapters Five and Six, cold storage and transport logistics must be undertaken and maintained to high quality standards in order to not adversely affect the very limited 'shelf life' of highly perishable wildflower product when exporting over large distances. Applying adequate quality controls to handling and transportation associated with the sale of wildflowers from the South West and Great Southern Region are critical to meeting market demand.

Key export markets for Australian native flowers include the 'mature' markets of Germany, the Netherlands and Japan. 'Immature' markets, where the preference for traditional cutflowers (such as roses and carnations) largely remain, include the United States and Spain (Gollnow 2002; Gollnow, Lidbetter and Worrall 2003; Horsman 2000; Parlevliet and Storer 2004).

4.6 WILDFLOWER TOURISM

This chapter would be remiss if it did not address wildflower tourism in Western Australia. Wildflowers have been integral to the national and global tourism marketing of the State for many years. A review of tourism brochures available during the study period noted regular references to wildflowers – either visually, in text, or in products for purchase (including tours) – in Western Australia. Interestingly, wildflower tourism has been marketed in Western Australia since the early twentieth century, and pre-dates by several decades the wildflower production industry itself.

However, geographical factors have a large influence on the location of wildflower tourism opportunities in Western Australia. Traditionally, wildflower tourism in the State has had a Mid-West geographical focus (with Wheatbelt and Goldfields Regions also prominent), due in part to the tourism experience desired by or marketed at the tourist, and in part to the variety and splendour of wildflower species occurring naturally in this area. The location of the Midwest Region, in relation to the South West and Great Southern, is depicted in Figure 4.3:



Figure 4.3 Regions in Southern Western Australia

(Source: Department of Local Government and Regional Development 2009)

Existing interpretive and sightseeing tours focus on the visual imagery of scrub and heath wildflowers in the harsh outback landscape. The geographic landscapes and associated wildflower imagery and tourism value differ somewhat from those of the South West and Great Southern Regions, which are in part largely dependent on foliage species contained within forested areas (with less visual appeal than flowers

to the majority of tourists). Regional geographical differences and their impacts on wildflower industry development are further explained in Section 4.7.

4.7 PHYSICAL GEOGRAPHY OF WESTERN AUSTRALIA'S WILDFLOWER INDUSTRY

The differentiation between southern and Mid-west wildflower tourism opportunities is directly related to the geography of these regions, and to how this geography affects wildflower ecology. Southern Western Australia has, in its coastal and forested areas, significantly higher rainfall than the Mid-west Region, and, in many areas, heavier soils. The descriptive analysis offered by the Interim Biogeographic Regionalisation for Australia (IBRA) framework contributes to an understanding of the natural attributes which affect native plant species distribution. The IBRA framework underpins Australia's national reserve and conservation system, and was established for the purpose of distinguishing and protecting Australia's under-represented biogeographic systems (DEWHA 2009).

The value of utilising IBRA regions to understand the distribution of wildflowers derives from the assessment of climate, geology, landforms, vegetation and faunal communities which underpin the classification of each region. For Western Australia, the IBRA regions are depicted in Figure 4.4. Discussion on the coded classification of the *relevant* IBRA regions noted in the legend (below) is presented following Figure 4.4.

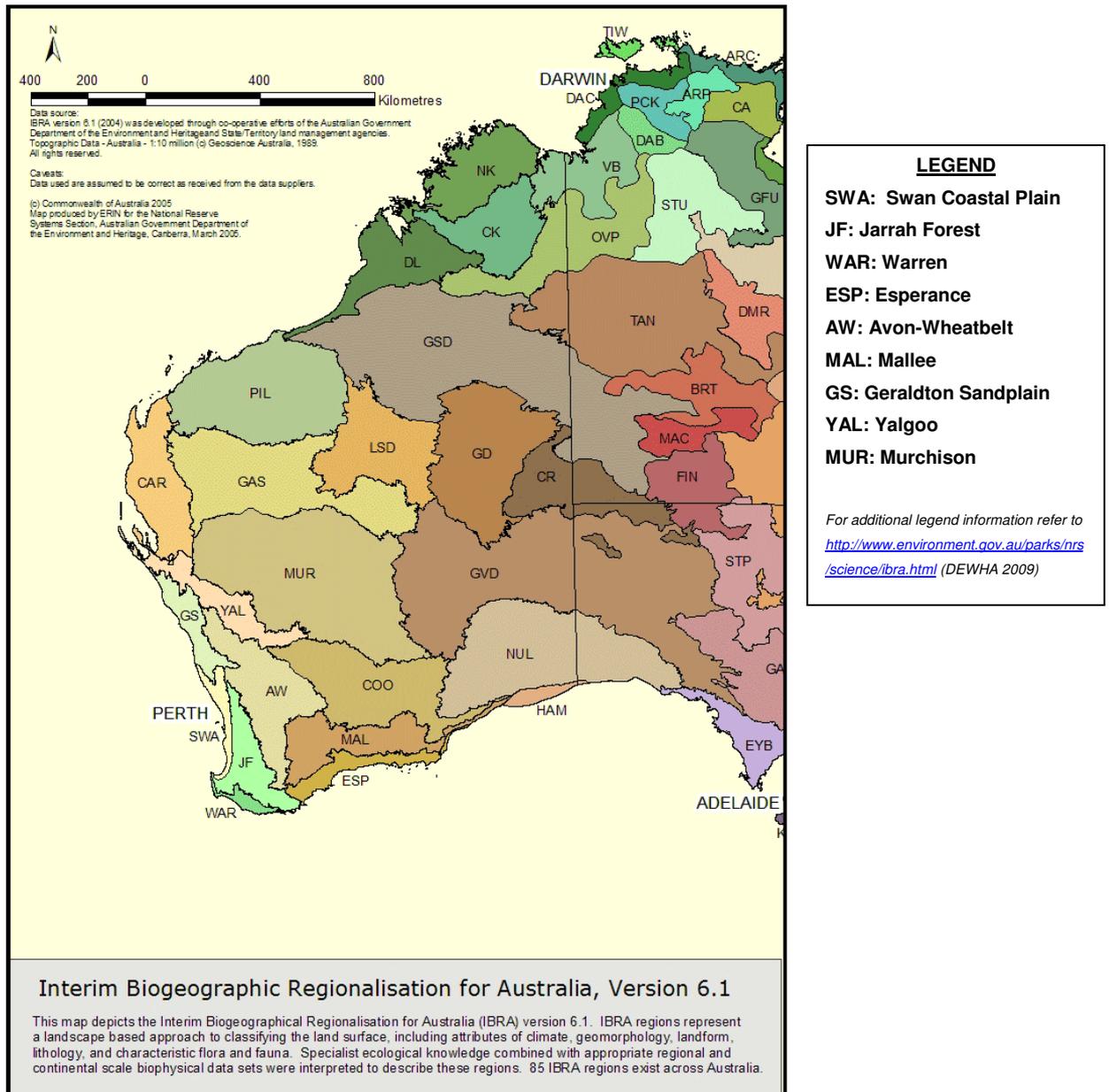


Figure 4.4 Interim Biogeographic Regionalisation for Australia.

(Source: Department of the Environment, Water, Heritage and the Arts 2009)

In relation to the South West and Great Southern Regions, the IBRA classifications of relevance, and their characteristics affecting native foliage and wildflower growth, include the following (taken from DEWHA 2009; Department of Environment and Conservation 2009):

- **Swan Coastal Plain:** This landscape typically includes low lying coastal plain sandy soils, dominated by *Banksia* and Tuart woodlands, in a warm

Mediterranean climate. While many *Banksia* and Kangaroo Paw (*Anigozanthus manglesii*) species have known tourism and cutflower value, the predominantly urbanised and cleared status of this IBRA region limits the area available for wildflower tourism activities. Furthermore, because this region is largely cleared and little remnant vegetation remains, the conservation value of remaining sites is high and this may restrict any wildflower tourism plans. The cultivation of wildflowers on the Swan Coastal Plain does occur, albeit to a lesser degree than in the Great Southern Region (see Chapter Five for more regional analysis).

- **Jarrah Forest:** Alluvial and eluvial deposits and lateritic gravels are typical in the Jarrah Forest IBRA region, with heavy, clay-based soils in eastern parts. The warm Mediterranean climate and heavier soils contribute to species rich shrublands and Jarrah (*Eucalyptus marginata*) and Marri (*Corymbia calophylla*) forested areas. Shrubs occurring within the forested areas, including *Persoonia* spp. (commonly known as ‘Snottygobbles’) and others including varieties of *Podocarpus* contribute significantly to Western Australia’s bush-picked ‘wildflower’ exports, although the foliage rather than the flower is exported. Jarrah forest tourism is significant in southern Western Australia, although a high contribution of wildflowers to this appeal is not assumed.
- **Warren:** The Warren IBRA region comprises loamy and lateritic soils, and Karri (*Eucalyptus diversicolor*) and Jarrah forests respectively. This IBRA region, with its tall Tingle trees (*Eucalyptus jacksonii*), is significant in Western Australia’s tourism, although this is mostly related to forest properties such as tree size rather than to wildflowers –

The majority of wildflower producers surveyed within this thesis program operated within the Warren IBRA region, taking advantage of the soil types and water availability, amongst other factors (see Chapter Five).

- **Avon-Wheatbelt:** Proteaceous scrub and heath is the dominant vegetation association of the Avon Wheatbelt IBRA region, with lateritic uplands and some derived sandplains, existing within a semi-dry or arid warm Mediterranean climate. As with IBRA regions in the Mid-west, wildflower tourism appeal from scrub and heath plants emerges within this area.

- **Mallee:** With a similar climate to the Avon-Wheatbelt and with duplex sand over clay soils, native vegetation in the Mallee IBRA region is dominated by Myrtaceous-Proteaceous heaths. Some wildflower tourism appeal occurs here, with particular interest for botany enthusiasts keen to observe rare and endangered plant species.

The Mid-west, however, exhibits the following characteristics in relation to the geographic and ecological arrangements encapsulated within its IBRA classifications:

- **Geraldton Sandplain:** The Geraldton Sandplain IBRA region includes mainly Proteaceous scrub and heaths, with many plants producing flowers of high visual appeal to tourists. Sandplain wildflowers in demand from tourists include waxflowers such as (*Chamelaucium spp.*) and varieties of *Banksia*, native orchids (*Thelymitra* and *Diurus spp.*), *Hakea* and *Acacia* varieties, and everlastings (*Helichrysum spp.*). Western Australia's wildflower tourism promotions have for many years focused on the wildflowers occurring within this and other semi-dry to arid areas, including those listed below.
- **Yalgoo:** The semi-arid Yalgoo environs with sparse sandy woodlands and scrubs create ideal conditions for everlastings and other highly visually appealing plants. Open woodlands covered at ground level by attractive flowers are a significant drawcard for wildflower enthusiasts.

The discussion provided above has described the major ecological systems occurring within the Great Southern, South West and Midwest Regions in order to differentiate the environmental conditions and circumstances which contribute to naturally occurring wildflower attractions in these areas.

The majority of tourist-attracting wildflowers occurring in Western Australia grow naturally on lighter (sandier), gravel or granite soils in areas of low rainfall. The Mid-west, in summary, contains environments which support the growth of visually-appealing heath and scrub wildflowers suited to drier conditions and lighter soils.

The South West and Great Southern Regions, however, have a combination of rainfall zones and soil types with much greater differentiation than the Mid-west. Forested, high rainfall areas in the southern parts of the State tend to be those that

attract significant tourist numbers – for example, around Margaret River in the South West – but their attraction, while nature-based, is not necessarily linked to the presence of wildflowers. In comparison with drier parts of Western Australia, these areas do not produce an abundance of *highly visual* wildflowers which then generate additional tourist demand for viewing or interpretation. Instead, foliage (classified as ‘wildflowers’ in export classifications) and other forest products and landscapes attract tourist interest. In addition, the higher rainfall areas including Margaret River and Denmark, offer a broad array of natural attributes which compete with wildflowers for tourist attention and expenditure – for example, in relation to Karri and Tingle forest products and associated forest experiences, surf and wineries.

Comparatively, drier areas with lighter soils are not only more suited to very visually appealing wildflower growth, but they are less geographically able to support alternative or competing agricultural and rural tourism opportunities such as those offered by vineyards and wineries. The Mid-west areas, with lighter soils, lower rainfall averages and perhaps less agricultural diversification opportunities, offer different tourist experiences than does the southern part of the State. As a result, wildflowers are not competing with as broad an array of agricultural and rural tourism products, in addition to the wildflower product being more visually appealing. The reputation and association of the Mid-west Region with wildflower tourism results from these factors.

In investigating, developing and/or promoting wildflower tourism, the biogeographic circumstances summarised in the IBRA classifications provide a context within which opportunities for commercially competitive wildflower tourism can be considered.

4.8 CHAPTER SUMMARY

Chapter Four has provided a descriptive overview of the wildflower industry in the study area, within State, national and global contexts. This information provides a platform upon which to consider the data to be presented and discussed in the remainder of this thesis.

The results presented in Chapter Five and discussed in Chapters Six through to Eight consider the existing and potential opportunities for regional development through wildflower tourism in the South West and Great Southern. As is considered

in the discussion, tourism was not an integral part of the wildflower industry in the Regions during the research period. The attitudes and aspirations of industry participants, and their status within the multifunctional rural transition concept, provide a basis on which tourism futures for the southern wildflower industry are contemplated in Chapter Eight.

CHAPTER FIVE – RESULTS

5.0 CHAPTER OVERVIEW

This chapter presents data gathered during the research program. Due to the multiple methods applied to obtain data, the information obtained has been collated and presented in various formats which enable the southern wildflower industry story to be told.

The methods used to obtain the results provided herein are described in Chapter Three. Data gathered from producers (growers and pickers) from multiple methods (survey questionnaires, interviews and emailed responses) are collated and presented throughout this chapter, with data from all methods being combined as appropriate.

The chapter firstly outlines the range of participants. This is followed by the presentation of data obtained from wildflower producers, tourism business operators, wholesalers and exporters, and industry support officers.

5.1 STUDY PARTICIPATION

As described earlier in this thesis, a range of techniques was used to collect data on the wildflower industry. Table 5.1 indicates the types of participants and response rates from the data gathering exercises. 'Other useable contact' in Table 5.1 refers to emailed advice and responses in relation to the survey questions and general wildflower industry development.

The column 'declined participation' relates to those industry participants who, for various reasons, were unwilling or unable to participate, yet provided reasons for this decision. Numbers of respondents declining participation are not included in the percentage figures given for Total Study Participation Rates. However, the reasons for declining participation were documented and warrant discussion in this consideration of the industry. Table 5.2 provides the reasons given for declined participation.

Table 5.1 Response and Participation Rates

	(A) Contacts made	(B) Surveys distributed	(C) Surveys returned	(D) Interviews conducted	(E) Surveys returned <i>and</i> interview conducted	(F) Other useable contacts (for example, email)	(G) Declined participation	(H) Invalid or unusable responses	(I) Total valid responses Columns C+D+F-E-H	(J) Total useable participation rate (%) Columns <u>C+D+F-E-H</u> n
Growers (n = 65)	65	65	25	14 ¹	8	3	4 ²	3 ³ <i>3 Returned to sender</i>	28	43.1%
Pickers (n = 133)	133	133	43	7	4	0	0	6 ⁴ <i>1 Returned to sender</i>	39	29.3%
Exporters/ Wholesalers (n = 6)⁵	4	N/A	N/A	3	N/A	1	0	0	4	66.6%
Wildflower industry support officers (n = 20)	20	N/A	N/A	20	N/A	<i>See note</i> ⁶	0	0	20	100.0%

Continued next page

¹ Five interviews involved couples.

² Participation declined by telephone, with explanations given – see Table 5B

³ Three grower questionnaires returned not completed, with explanations – See Table 5B

⁴ Six “picker surveys” returned by seed collectors. Information excluded from analysis

⁵ Six wildflower wholesalers were referred by growers and pickers. Nineteen wildflower exporters and specialized wildflower retailers were known to be operating in Western Australia at the time of the research program.

⁶ Multiple follow-up emails and contact with industry support officers provided ongoing advice and information.

Table 5.1 Response and Participation Rates (continued)

	(A) Contacts made	(B) Surveys distributed	(C) Surveys returned	(D) Interviews conducted	(E) Surveys returned <i>and</i> interview conducted	(F) Other useable contacts (for example, email)	(G) Declined participation	(H) Invalid or unusable responses	(I) Total valid responses Columns C+D+F-E-H	(J) Total useable participation rate (%) Columns <u>C+D+F-E-H</u> n
Others related to wildflower industry¹ (n=1)	1	1	1	1	1	1	N/A	N/A	1	100.0%
Tourism operators (n = 66)	66	66	30	5 ²	0	5	0	0	40	60.6%
Tourism industry support officers (n = 6)	6	6	1	3	0	0	0	1	4	66.6
TOTAL N = 297	295	271	100	53	13	10	4	14	136	45.8%³

¹ Wildflower grower not resident in study region; contacted researcher(after media coverage) to request participation in the study. Historical information provided was useful for research purposes, but personal responses to survey questions were excluded from formal analysis

² Five informal discussions with tourism operators regarding wildflower industry opportunities in study area.

³ Response rate for survey questionnaire and interview participation for growers, pickers, support officers and tourism operators combined.

Of the producers responding to the survey, five respondents considered themselves both a grower and a picker. The ‘picking’ undertaken by these growers occurred on private land, but still required a Commercial Producers Licence from the Department of Conservation and Land Management (CALM). The pickers in this category were contacted through the ‘grower’ round of contacts, due to their production focus being from private land. In addition, these pickers would not have been contacted through the CALM-distributed picker survey, which was sent to Crown Land pickers, unless the picker possessed licences for harvesting on both private and public land. Where a producer has indicated both cultivation and picking in their activity, the response from that producer is only considered once in the analysis, to avoid giving extra weight to that grower/picker’s views.

Table 5.2 outlines the reasons for declined participation in the research program, however it should be noted that other industry operators who did participate in the survey and interview process frequently cited similar issues of workload, risk and finances as impediments to their future personal involvement in wildflower production. These issues are further discussed in Chapters Six and Seven, and are presented in detail within this chapter in Section 5.2.5.

Table 5.2 Declined Participation Explanations

Summary of reasons for declined participation	Frequency
Have recently exited wildflower industry or are in process of exiting industry for economic reasons – “Too much work, too little financial reward for the grower, too many risks” (Respondent).	5
Have recently exited wildflower industry for personal reasons (for example, death of partner)	1
Philosophical objection to questions asked and government-supported research	1
No reason provided	1

The ‘philosophical objection’ to participation warrants further comment. One grower responded to the receipt of the questionnaire with a lengthy telephone call, outlining concern and offence taken from the questions regarding wildflower production turnover. (It should be noted that the questionnaire cover letter clearly indicated that all questions, including those relating to financial turnover, were optional). Moreover, this grower objected to the provision of any information which may assist

government agencies (specifically the Department of Agriculture) in policy and program development. This objection was linked to existing personal concerns and issues with the role of the Department of Agriculture in the industry during their lengthy amount of time in wildflower production (seventeen years). The grower also commented that “true, 100% exporters won’t give you any feedback – professionals won’t respond to this survey”.

The implications of this latter statement are discussed further within the analysis and discussion chapters of this thesis. The comment proved to be reasonably accurate, and corresponded with informal advice provided by a number of industry support officers and other producers, that certain large producers would be very unlikely to participate.

There were no notable variations in the written answers to questions, as compared to the verbal interview responses. Oral interviews yielded similar results to surveys requiring written responses.

5.2 PRODUCER SURVEYS AND INTERVIEW FINDINGS

The data collected from wildflower producers, including growers and pickers, is generally presented in this section in a combined approach, to provide an overall representation of industry production. However, responses are differentiated where there is clear distinction between industry sectors.

5.2.1 PRODUCER DEMOGRAPHICS

5.2.1.1 PRODUCER AGE PROFILE

Age demographics for wildflower producers responding to the survey and participating in interviews are provided above in Figure 5.1. Six growers did not indicate their age.

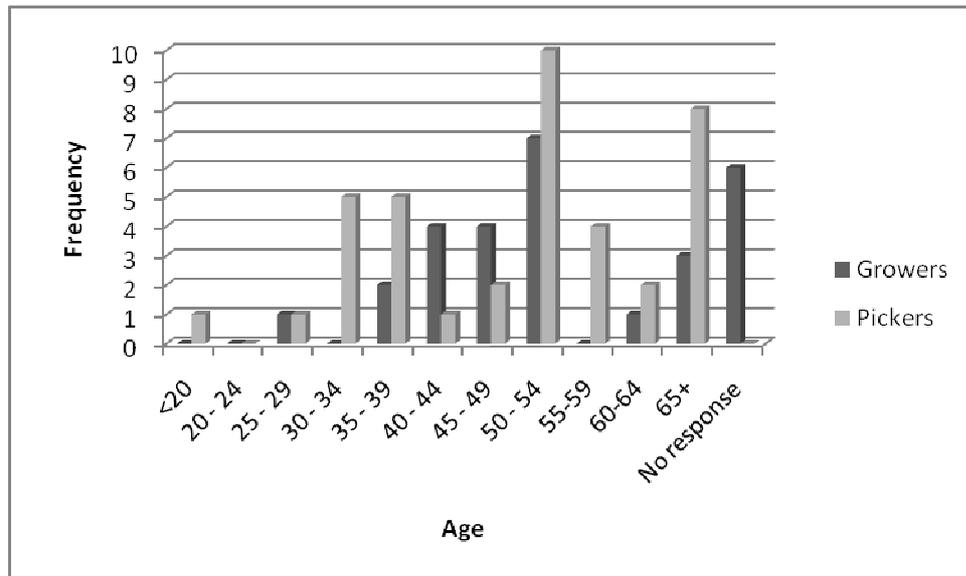


Figure 5.1 Producer Age Profile

5.2.1.2 RESPONDENT GENDER

Figure 5.2 indicates the gender of the producers who contributed to the study, either through questionnaire or interview. 'No response' to this question was received from six survey respondents.

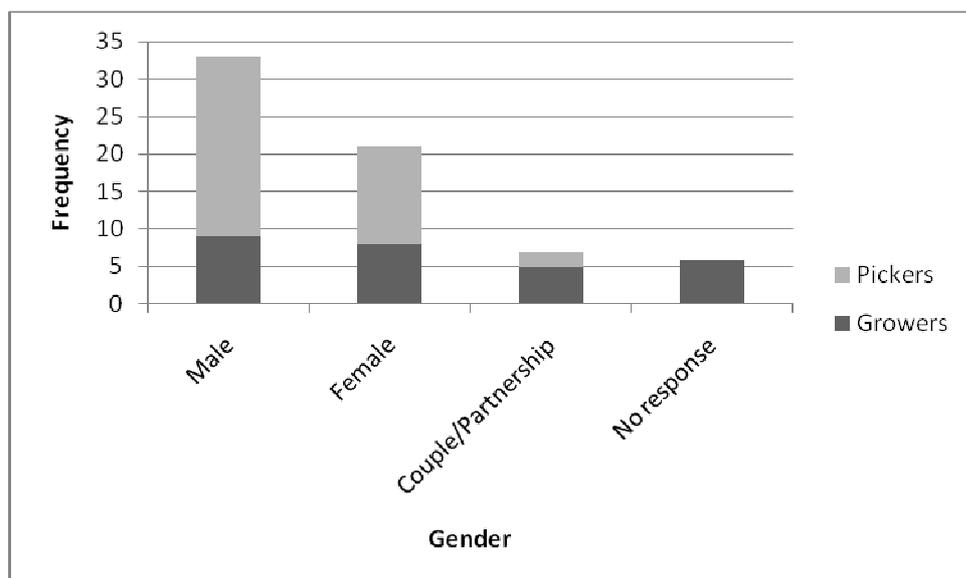


Figure 5.2 Respondent Gender

5.2.1.3 PARTICIPANT LOCATION

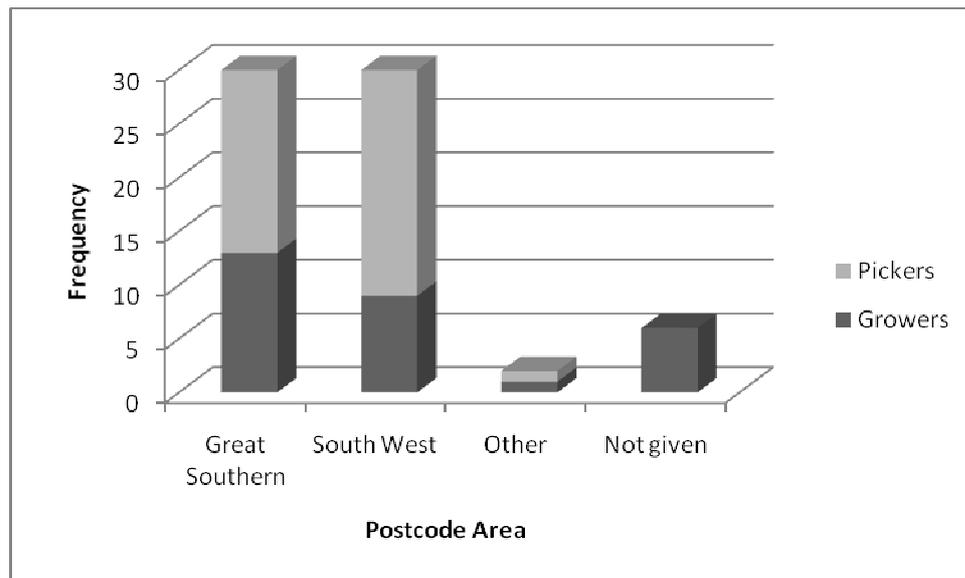


Figure 5.3 Regional Residential Location

Figure 5.3 indicates the location of producer study participants. One grower and one picker lived adjacent to the study region. All remaining growers indicated their plantation was located in the same post-code area as their residential address. With pickers, 85% of respondents picked where they lived, or within approximately a half hour drive. Only 5% picked solely outside of their residential locality, while 10% did not indicate locality, but instead provided generic descriptions such as ‘State Forests’. It is assumed this generic response may be associated with an overall concern with government regulation, scrutiny and interference in the wildflower picking industry, which came through in many responses to a number of survey questions. This is further discussed in later sections.

5.2.2 PRODUCER HISTORIES AND BACKGROUNDS

Producer histories and backgrounds were investigated in efforts to determine evidence of trends such as rural-to-urban migration, a ‘sea change’, or other clear indicators of change. Analysis is again provided in Chapters Six and Seven.

5.2.2.1 TIME IN INDUSTRY

When asked to indicate their time spent in the wildflower industry, the responses from 36 pickers averaged ten years and seven months. For growers, 18 responses

to this question averaged nine years and one month. Ten growers did not respond to this question.

5.2.2.2 PREVIOUS OCCUPATION

Figure 5.4 illustrates the responses to questions of 'previous occupation'. Growers and pickers were asked about their employment prior to entering the wildflower industry. Unskilled labour (such as mill workers) and general farming were the most common responses.

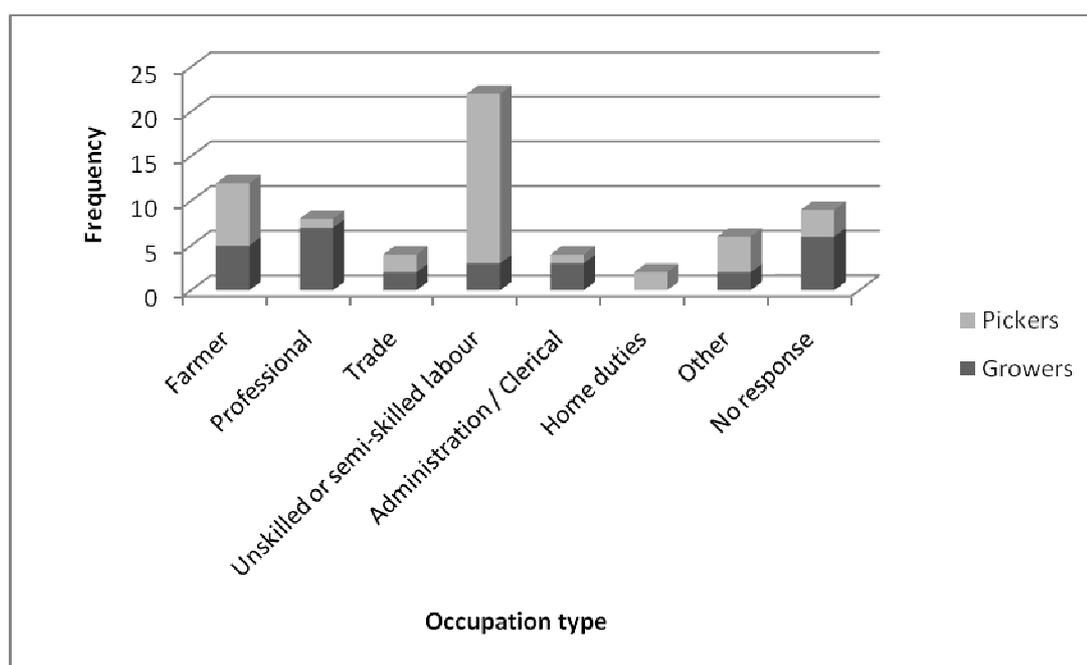


Figure 5.4 Previous Occupation

5.2.2.3 PREVIOUS LOCATION

Growers were asked their previous residential location, and the time spent at that location, to assist in determining whether a 'sea change' or urban to rural migration (for lifestyle outcomes) was occurring. Clear responses to this question were difficult to obtain. Grower survey respondents who did indicate time spent at previous address (n = 11) averaged nine years at the previous address. This figure does not include those who indicated 'always farming'. Results are depicted in Figure 5.5.

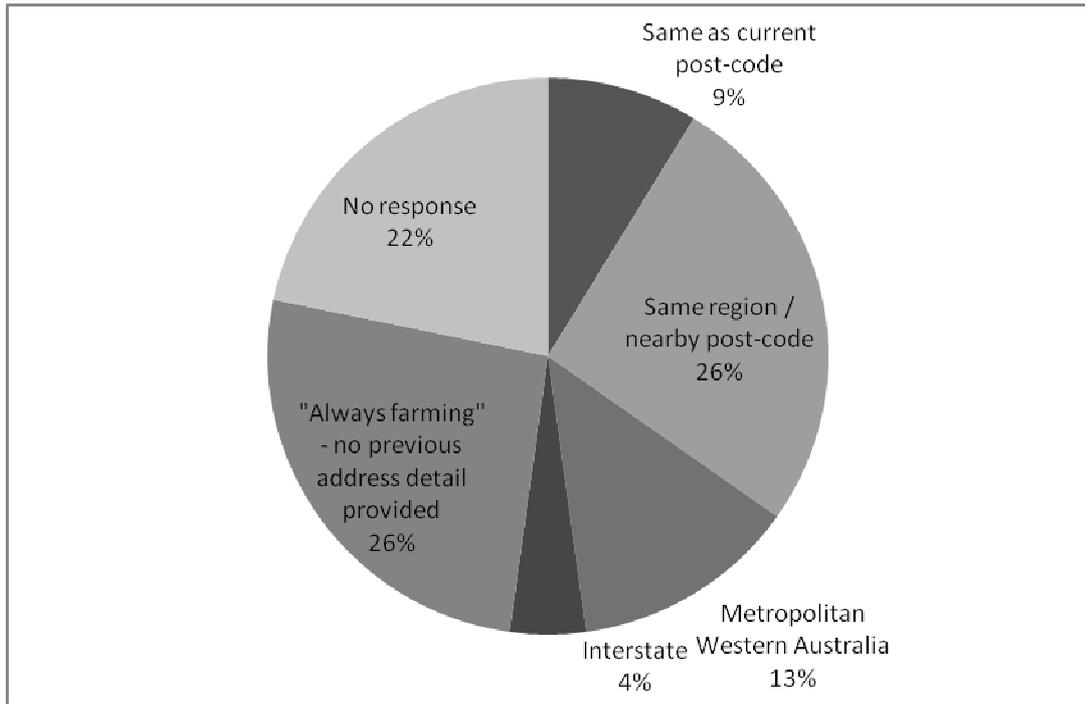


Figure 5.5 Previous Residential Location

5.2.2.4 INDUSTRY INVOLVEMENT

Growers were asked how they would classify their own status in the wildflower industry. Were they a newcomer or experienced? A summary of responses is provided in Figure 5.6.

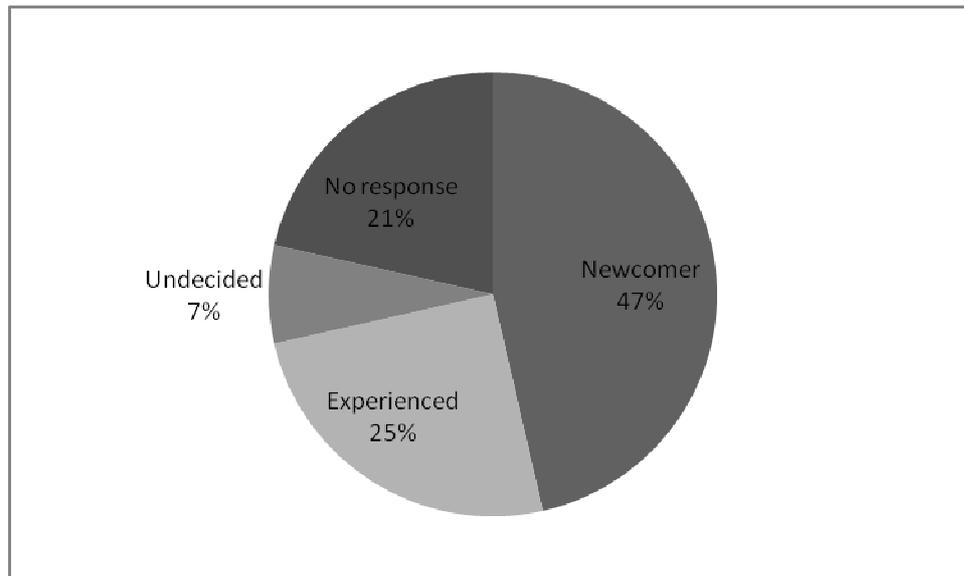


Figure 5.6 Grower Industry Involvement Status

Further to this question, growers were then asked if they considered themselves to be amateur or professional producers, and whether their involvement in the industry was full-time or part-time. A matrix of responses is provided in Table 5.3.

Table 5.3 Grower Participation in Industry

	Amateur	Professional	Not indicated	Total
Full-time	0	4	1	5
Part-time	4	2	5	11
Not indicated	3	1	8	12
Total	7	7	14	28

Pickers, in the shorter, simpler questionnaire, were asked whether they considered themselves to be professional or non-professional wildflower pickers. Eighty per cent of respondents, as depicted in Figure 5.7, considered themselves to be professional pickers. The high proportion of 'professional' respondents *may* be associated with timely industry politics related to the *Forest Management Plan* which was being developed at the time, and a desire to voice a strong and common concern that State Forest blocks could possibly not be accessible for wildflower picking in the future (see "issues" in Section 5.2.5).

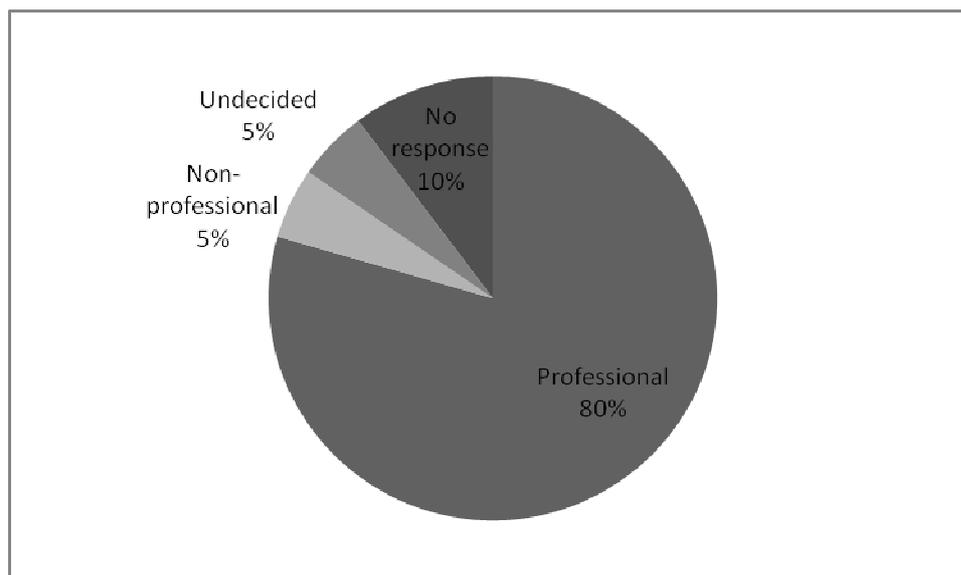


Figure 5.7 Picker Industry Involvement Status

5.2.2.5 BEING A ‘NEWCOMER’ – IMPACTS ON INDUSTRY INVOLVEMENT

Growers who indicated they were a ‘newcomer’ were asked if being new to wildflowers impacted on their involvement in the industry. A summary of interview discussions and responses to this survey question is provided below:

(1) Difficulty engaging with other growers for advice

New growers, and those who recollected their experiences when they were new to the industry, indicated that it was difficult to obtain information or support from established growers. Many comments were made about the wildflower industry being ‘cliquey’ and difficult to participate in at a professional level.

For example, one grower commented that “the big growers don’t want to pass on knowledge. They’re not accessible to others. They could help researchers and small growers. They need to for the sake of the industry” (Grower). Another noted that “the information available at the beginning was bad. No-one was really prepared to give information” (Grower).

Both growers and pickers commented on the considerable advice and support provided by certain wholesalers. Indications of a parent-child like relationship between wholesalers and their suppliers came through from the discussions with producers, as well as from interviews with wholesalers, and

these views were confirmed by many industry support officers (albeit not always with positive overtones).

(2) Agronomic information difficult to obtain

New and more established growers frequently cited difficulties in accessing agronomy information related specifically to wildflower production (see “issues” in Section 5.2.5).

The lack of wildflower-specific agronomic advice, particularly for heavier soils and cooler, southern climates, affected the ability of producers to develop and achieve quality assurance in their production systems.

(3) Capital investment and financial risk management

Some growers indicated that they entered the wildflower industry unprepared for the level of capital investment required, and that this was because they lacked specific information on the industry. Many recognised the need to spread investment (across varieties) as a risk management strategy.

On a similar topic, a number of new industry entrants noted that insufficient financial returns limited their opportunities to participate in the industry in more depth, which in turn stifled their ability to invest further and expand their enterprises.

(4) Trial and error learning

New industry entrants advised that they learned by experience if they were unable to obtain information elsewhere. This was particularly the case for growers working on heavier soils, because most Western Australian research was focused on production of specific varieties suited to lighter, sandy soils.

Many new producers also noted that they found the workload to be greater and more physically demanding than they had originally anticipated. This was particularly so for those who had not previously been involved in farming or horticultural activities.

(5) Hobby farming – not needing to make a profit

A small number of participants indicated that because their wildflower production was more of a hobby than a business, their need to become involved in industry issues such as marketing was limited. This view was endorsed by several wholesalers/exporters (see Section 5.4), who noted that many smaller-scale producers are satisfied with simply providing product to the wholesaler, who then manages the business aspects of marketing, sales, delivery to clients and the like.

(6) Utilisation of Department of Agriculture and Nurseries for information

Many newcomers advised they used the Department of Agriculture to access information. This was particularly so in the Great Southern, where producers

were very positive about the support and advice provided by specific local staff members. However, this view was regularly qualified with comments suggesting that a comparable level of support was not common from most Department of Agriculture staff, particularly those based in Perth.

New growers also cited nurseries as sources of information and advice.

(7) Existing farmers

Producers who were relatively new to wildflowers, but not new to agriculture, were more confident in their information-sourcing and agronomic decision-making than were those who were new to agriculture. Knowledge of the capacity of the land, physical production techniques (such as soil cultivation, fertiliser application and irrigation), and familiarity with long hours and physically demanding work were more evident in producers who had experience in agriculture.

(8) Industry group membership

Ten of the grower respondents advised that they were members of wildflower industry groups – either Flowerswest, the umbrella organisation for all flower production in Western Australia, or specific groups such as the Rutaceae (Brown Boronia) Growers Group. Eight of the ten indicating group membership were newcomers to the wildflower industry. A number of other, more established growers, indicated that they had previously been a part of industry groups, but did not feel that they provided value for money.

5.2.3 PRODUCTION

Producers were requested to provide information on issues such as land tenure, income and property size. Specific data on species grown was not sought, since this had been obtained in a survey undertaken by the Department of Agriculture with similar timing (Department of Agriculture 2001).

Introductory letters sent to growers with the questionnaires emphasised the confidentiality of the responses, and the right to not answer questions if so desired. As a result, non-response rates for questions regarding production were relatively high.

5.2.3.1 GROWER PROPERTY TENURE

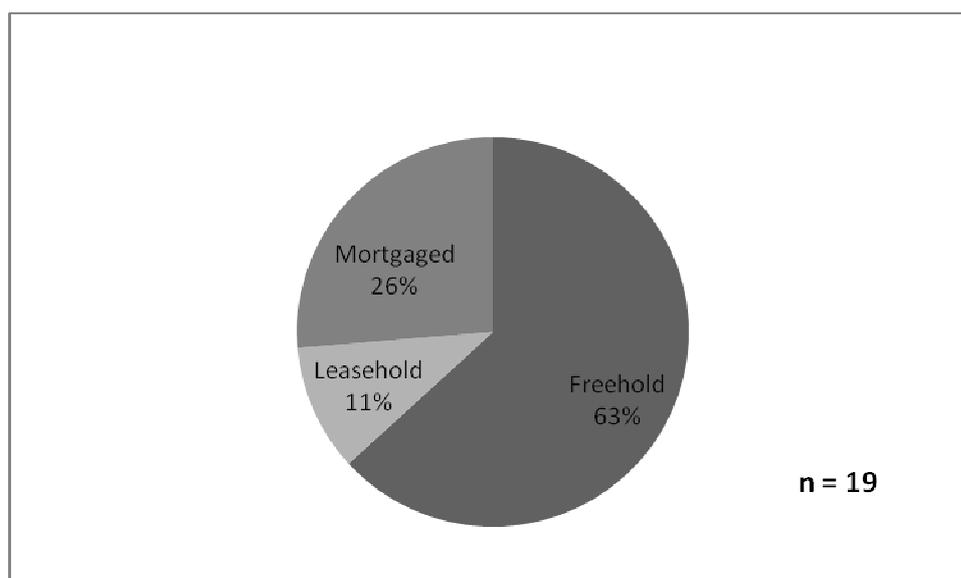


Figure 5.8 Grower Property Tenure

Figure 5.8 summarises the status of land tenure arrangements for growers producing wildflowers on their property.

5.2.3.2 PROPERTY SIZE AND AREA CULTIVATED

Grower property size and area planted to wildflower cultivation are positively, but not very strongly, correlated, as depicted in Figure 5.9 ($R^2 = 0.22$). The majority of respondents (13/18) who indicated area cultivated were growing five hectares or less of wildflowers. This corresponds with research undertaken by the Department of Agriculture (Department of Agriculture 2001) which found that, State-wide, 77% of *all cut flower* establishments in Western Australia in 1999 were cultivating five hectares or less.

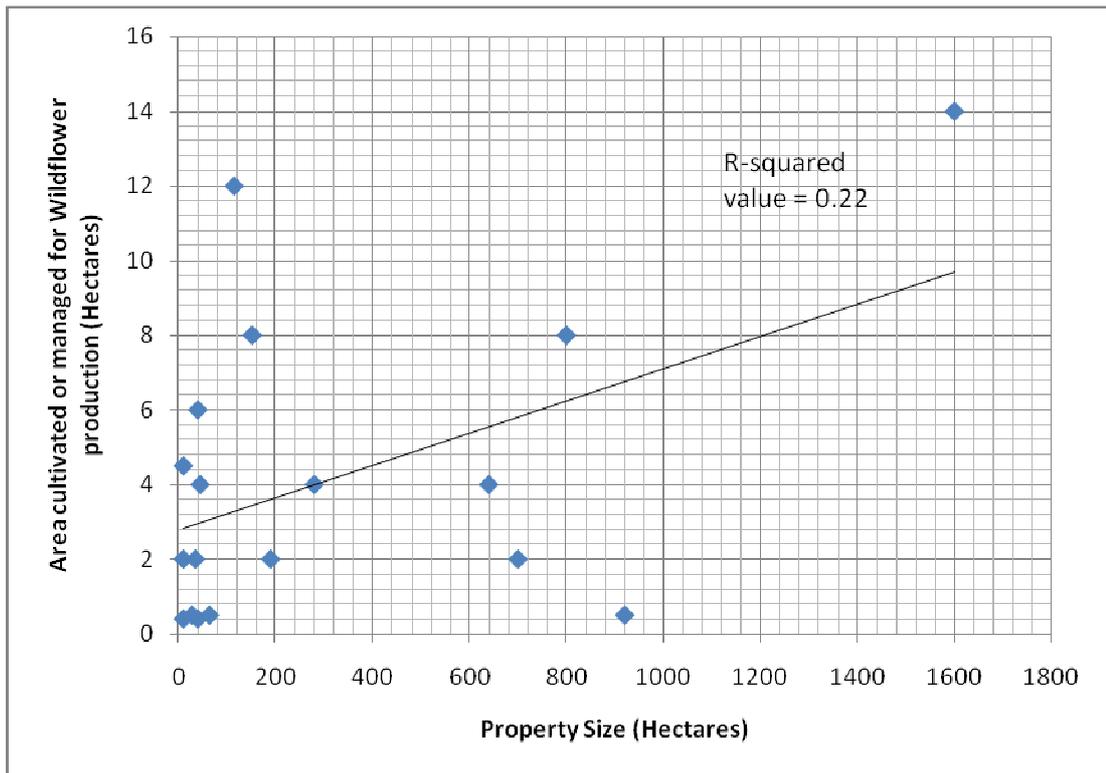


Figure 5.9 Wildflower Cultivation and Property Size

5.2.3.3 INCOME DERIVED FROM WILDFLOWERS

Figure 5.10 illustrates the current annual net income from wildflower cultivation, as provided by growers. Questions relating to income were, as discussed in Chapter Three, demarcated as voluntary, due to the personal and confidential nature of this information.

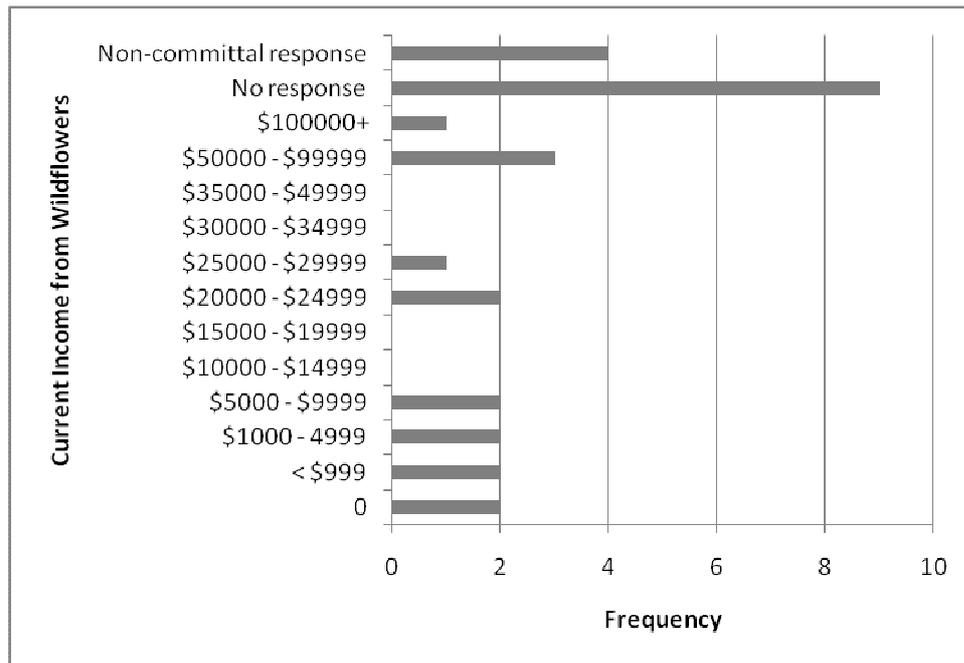


Figure 5.10 Current Income from Wildflowers (Growers)

'Non-committal responses' were answers such as "plenty", "a lot more", and "enough to maintain lifestyle in retirement." The classification '\$0 income' reflected new growers in the 'building' stage of their wildflower enterprise.

Growers were also asked whether they were satisfied with their current level of wildflower income. Of those indicating a desire to increase their income from wildflower production (n = 14), 50% noted a desire for more than \$20,000 in increased net income. A further three growers (21%) suggested an income rise of \$5-20,000 would be satisfactory ("enough to maintain our lifestyle in retirement" – Grower), while 14% desired less than \$5,000 net increased income. Notably, larger-scale growers desired comparatively larger turnovers. Smaller scale growers wanted smaller turnover figures and were more satisfied with smaller income amounts.

When asked if they were interested in earning increased wildflower income, pickers and growers responded as per Figure 5.11.

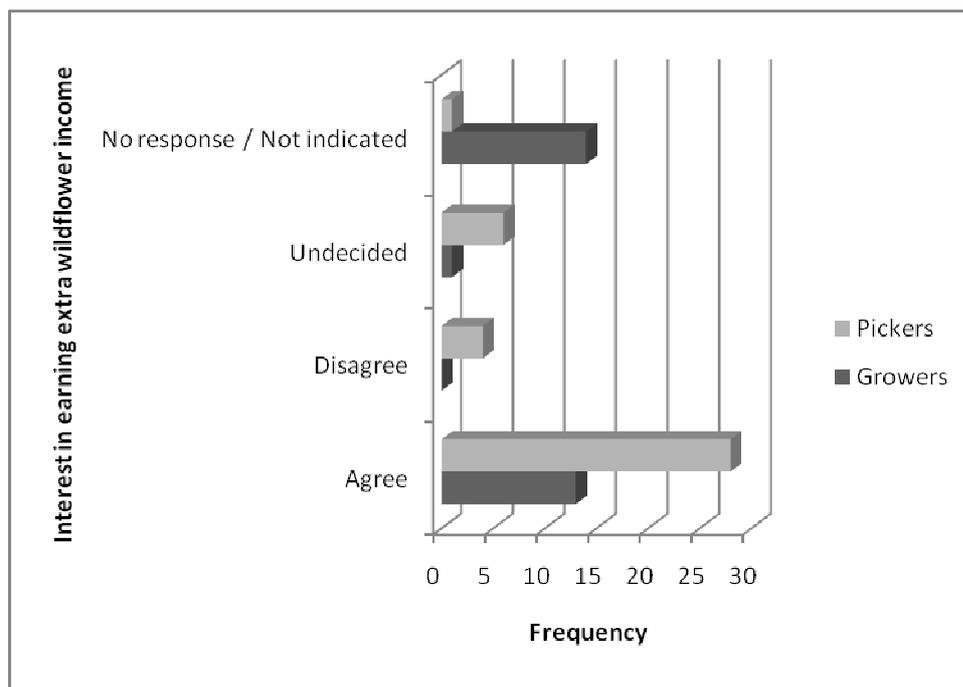


Figure 5.11 Desire for Increased Wildflower Income

Responses to the categories 'Undecided' and 'Disagree' may indicate that producers are relatively satisfied with current work output and turnover levels. Further income may require additional work – and for those who value the non-economic benefits of wildflower picking and cultivation (see Figure 5.13), increasing income may impinge upon the non-tangible benefits related to lifestyle.

5.2.3.4 OTHER INCOME SOURCES

To supplement the wildflower-production income information, and to obtain a broader picture of the micro-economies of wildflower producers, study participants were asked to indicate where, if anywhere, their additional income originated. Figure 5.12 illustrates the responses.

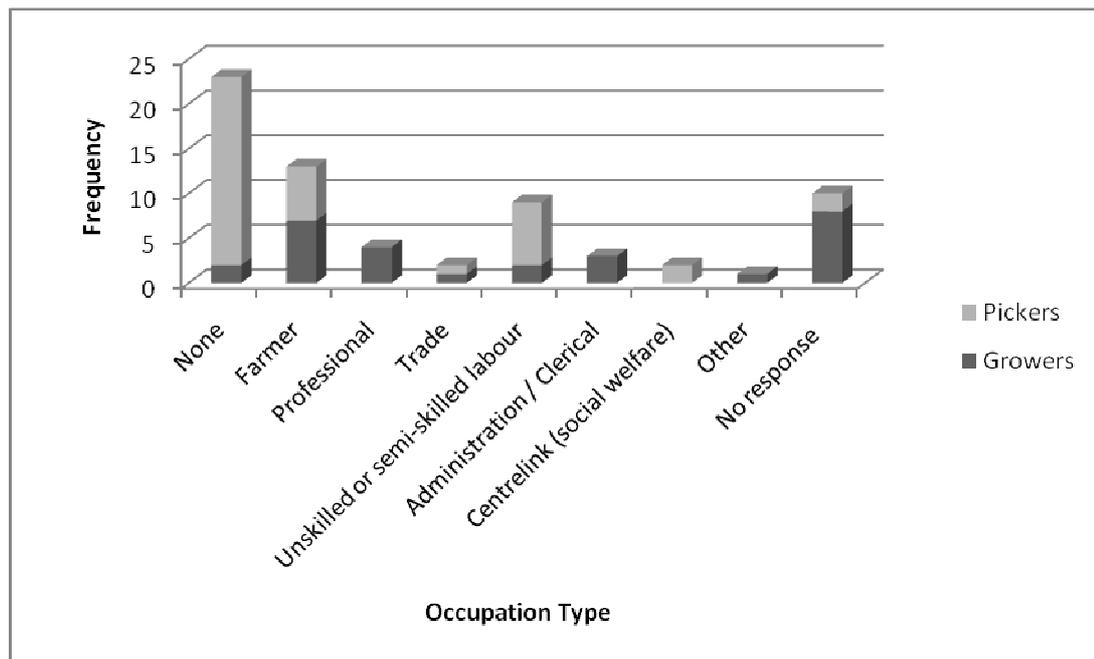


Figure 5.12 Other Occupation / Income Source

The high proportion of wildflower pickers whose sole income is from picking was unexpected, but correlates with the eighty percent of picker respondents who identified themselves as being professional pickers. The relatively low number of growers with no other income source may correspond with the comment made by a non-participating grower that “true, 100% exporters won’t give you any feedback – professionals won’t respond to this survey.”

For other respondents, alternative income streams may indicate personal financial risk management (livelihood diversification or spreading of income sources), or the desire to supplement other income sources such as welfare payments (Centrelink).

5.2.4 PRODUCER MOTIVATIONS, EXPECTATIONS AND ASPIRATIONS

5.2.4.1 PRODUCER MOTIVATIONS

Figure 5.13 summarises the motivations of producers for entering the wildflower industry.

Following this diagram, Figure 5.14 then categorises these responses to display key motivational reasons – economic, social/lifestyle, or ‘other’, which includes factors

such as “time availability,” “something different at the time”, and general “environmental” reasons.

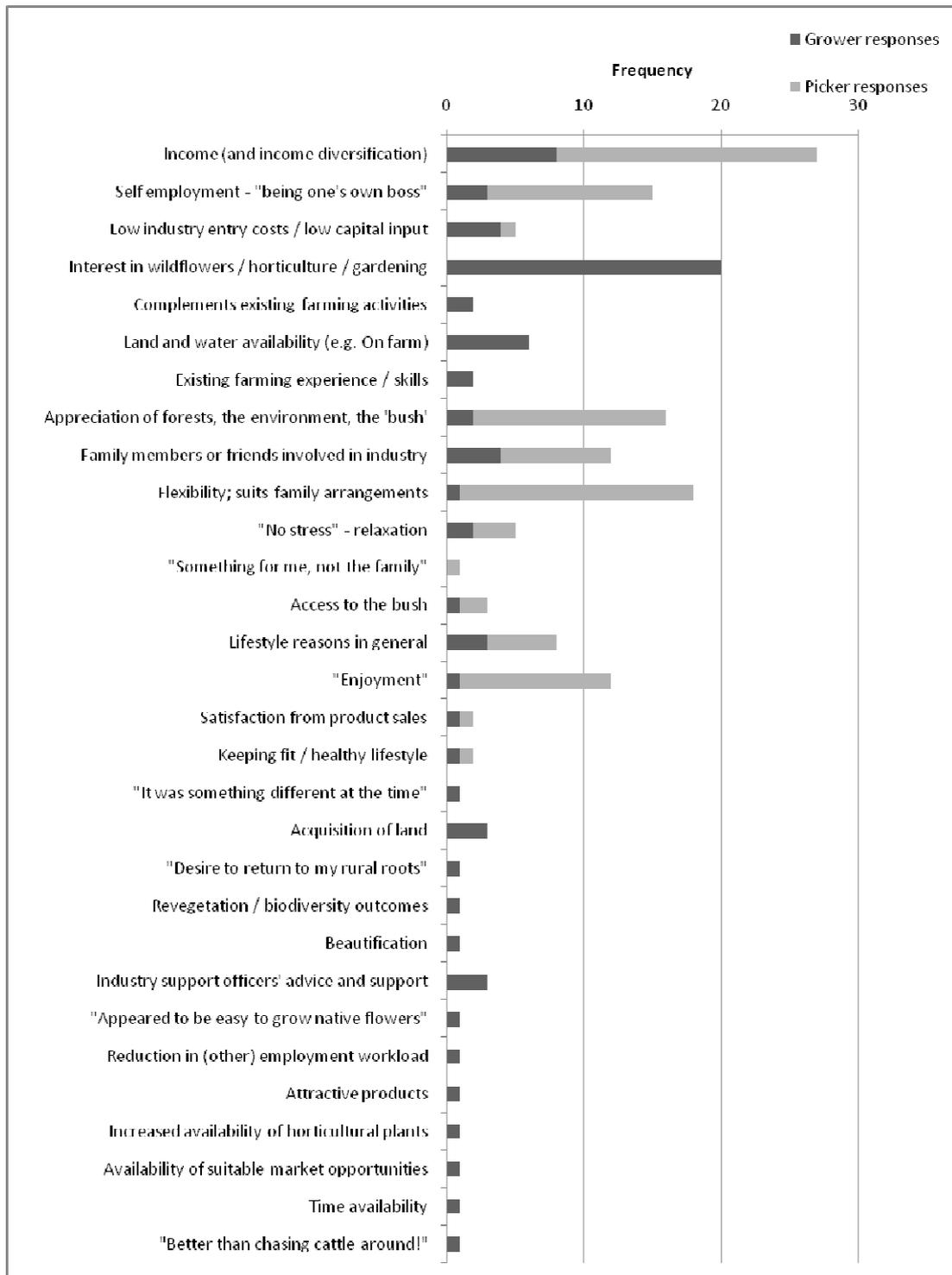


Figure 5.13 Producer Motivations for Entering the Wildflower Industry

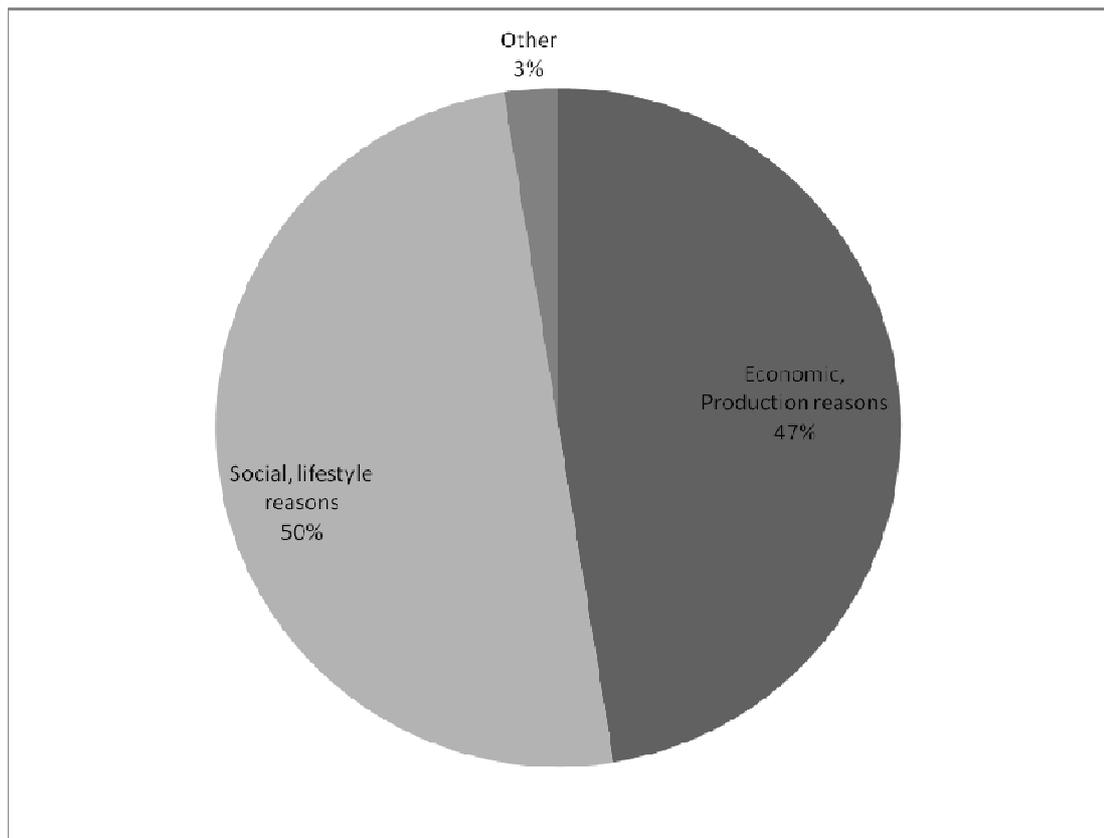


Figure 5.14 Summary of Producer Motivations for Entering the Wildflower Industry

The summary diagram above (Figure 5.14) illustrates the relatively equal values placed upon lifestyle and income by the South West and Great Southern wildflower producers. This is analysed in depth in Chapter Six, and is considered in relation to the concept of the multifunctional rural transition, in Chapter Seven.

5.2.4.2 PRODUCER EXPECTATIONS

Growers were asked if their expectations from participating in the wildflower industry had been met. As depicted in Figure 5.15, the response rate to this question was very poor (54%) which may be due to the length of the questionnaire and ‘fade out’ in the response rates and detail provided to specific questions.

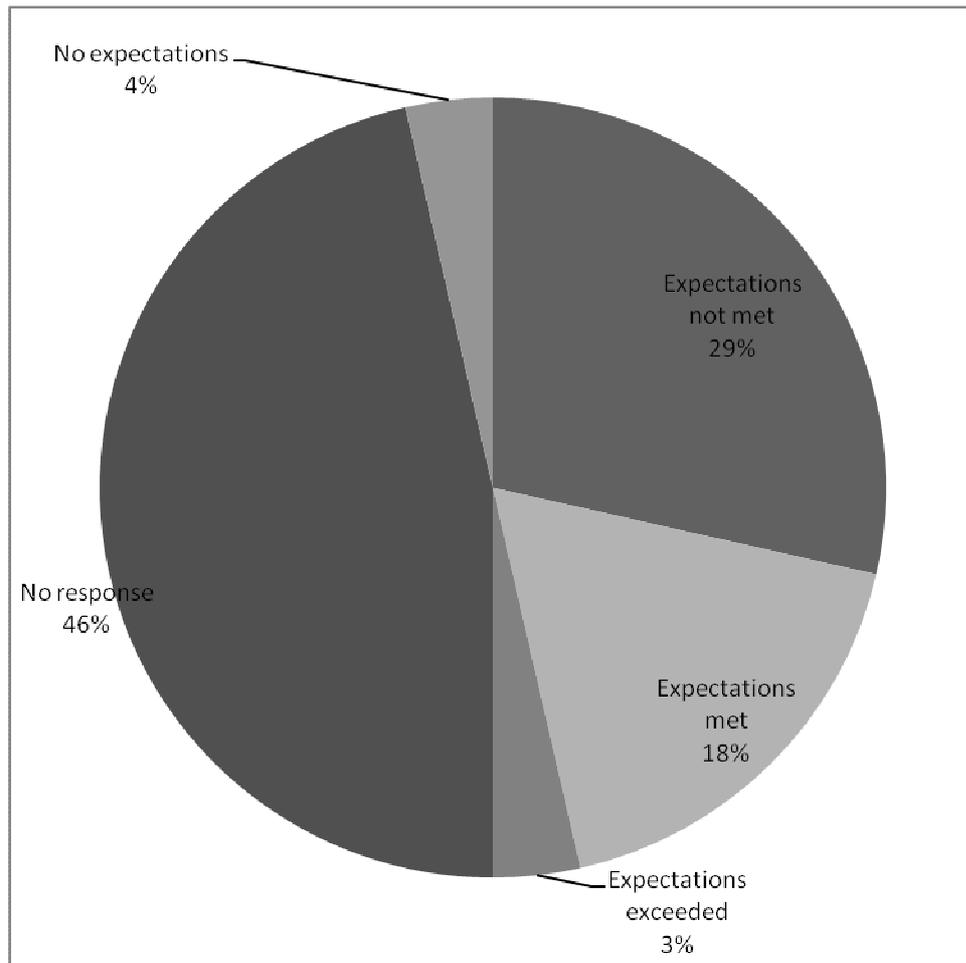


Figure 5.15 Grower Expectations

Pickers were asked in more simple terms whether they enjoy picking, would recommend the job, and enjoy the lifestyle. Responses are illustrated in Figure 5.16.

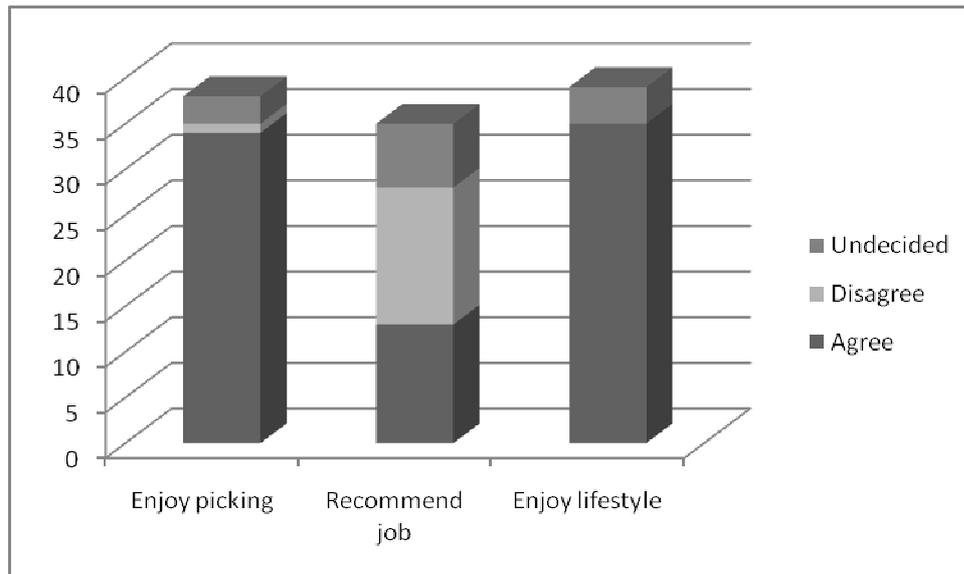


Figure 5.16 Wildflower Pickers – Lifestyle and Enjoyment

Clearly, the number of pickers who enjoy the job and the lifestyle it offers is significant. The discrepancy between those answers and the response to the question “would you recommend the job” may relate to comments made by a number of pickers that indicated they do not want more competition for State Forest block allocations, and thus would not want more people to enter the picking industry.

5.2.4.3 PRODUCER ASPIRATIONS

All producers were asked whether they would be in the wildflower industry in five years’ time. Figure 5.17 illustrates the responses. It should be noted that many pickers added the clause “if the government will let me,” reflecting the industry uncertainty over the future of State Forest blocks and access for wildflower picking while the Forest Management Plan was being negotiated.

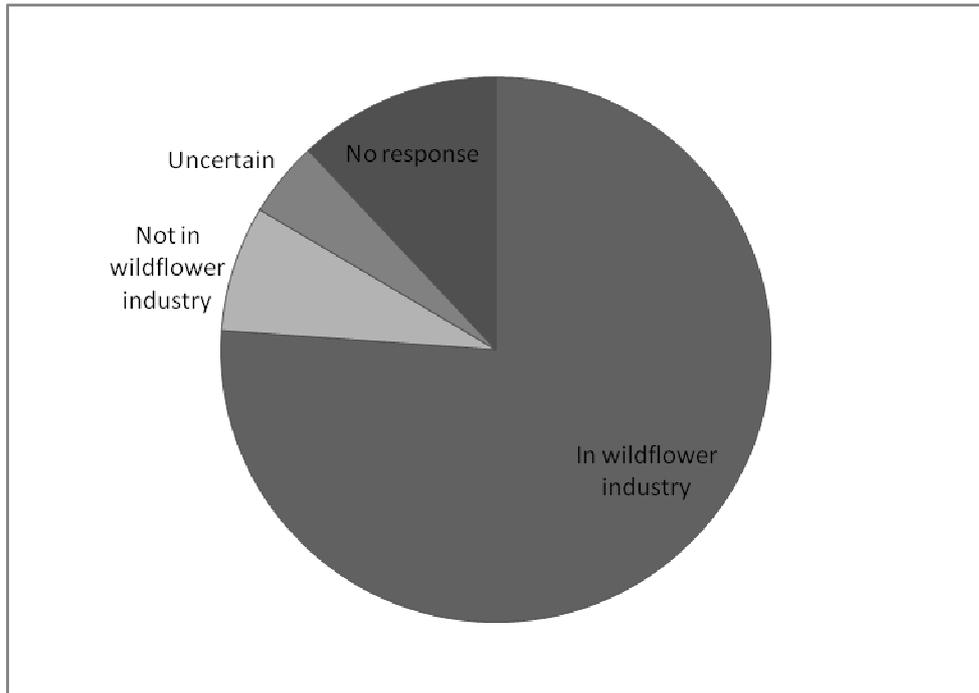


Figure 5.17 Where will you be in five years' time? (All Producers)

5.2.4.4 LIFESTYLE COMPARISON

In the more comprehensive questionnaire, and in relation to their personal experiences in the industry, wildflower growers were asked how the lifestyle of the wildflower industry compared with those associated with their previous occupations. Again, a relatively high non-response rate was received. As depicted in Figure 5.18, approximately equivalent numbers felt the lifestyle was better, as compared to those who found it more challenging, hectic, or asked “what lifestyle”?

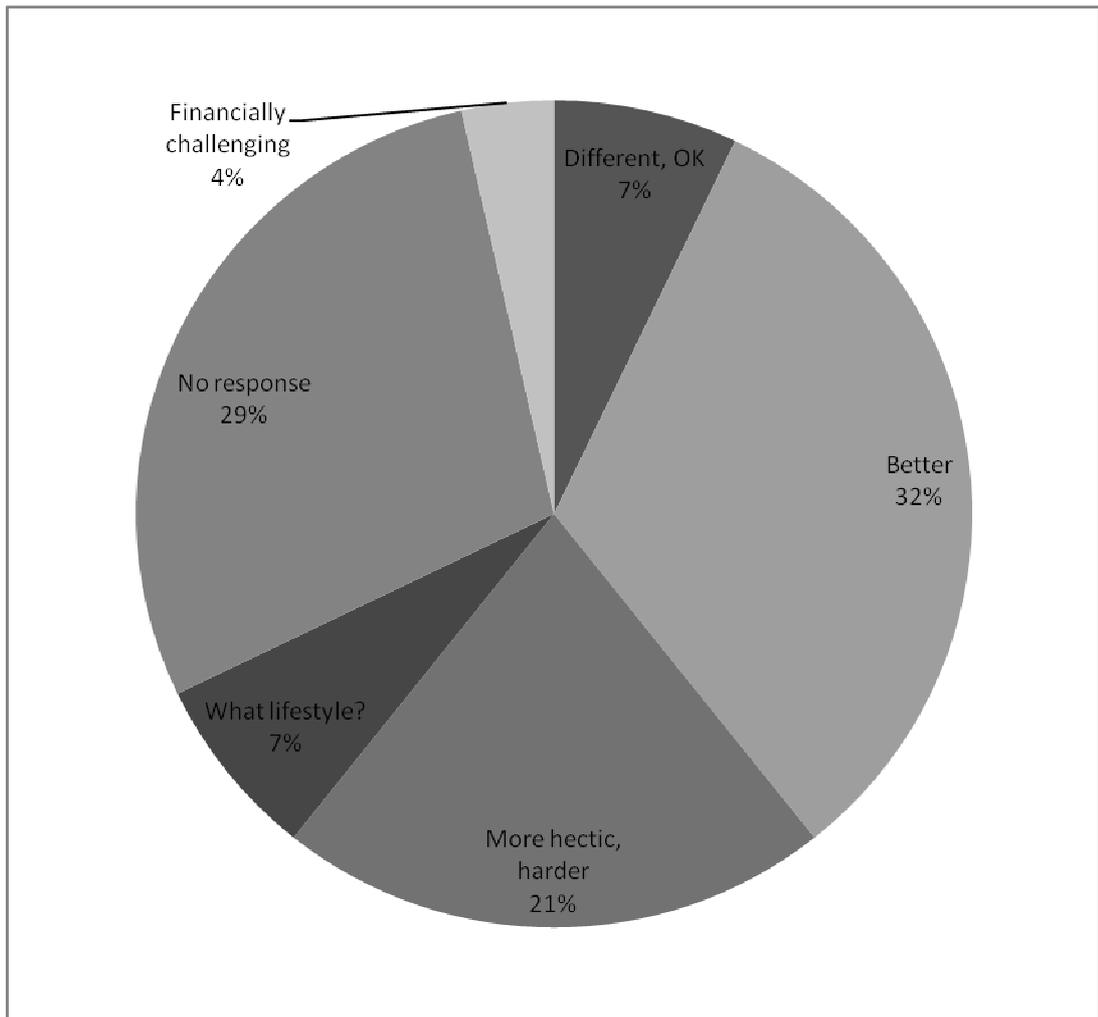


Figure 5.18 Grower Lifestyle Comparison

5.2.5 ISSUES RAISED

Figure 5.19 provides a summary of issues raised by wildflower producers, which are considered to affect the progress of the industry, or their businesses. Issues raised by producers are discussed further in Chapters Six and Seven.

Growers were asked multiple questions regarding the issues affecting the industry’s development – including impediments to growth, opportunities for government involvement, and research and development requirements. Pickers were asked a straightforward question regarding issues for the industry, which provided broad scope for answers.

Figure 5.19 provides responses from both groups of producers.

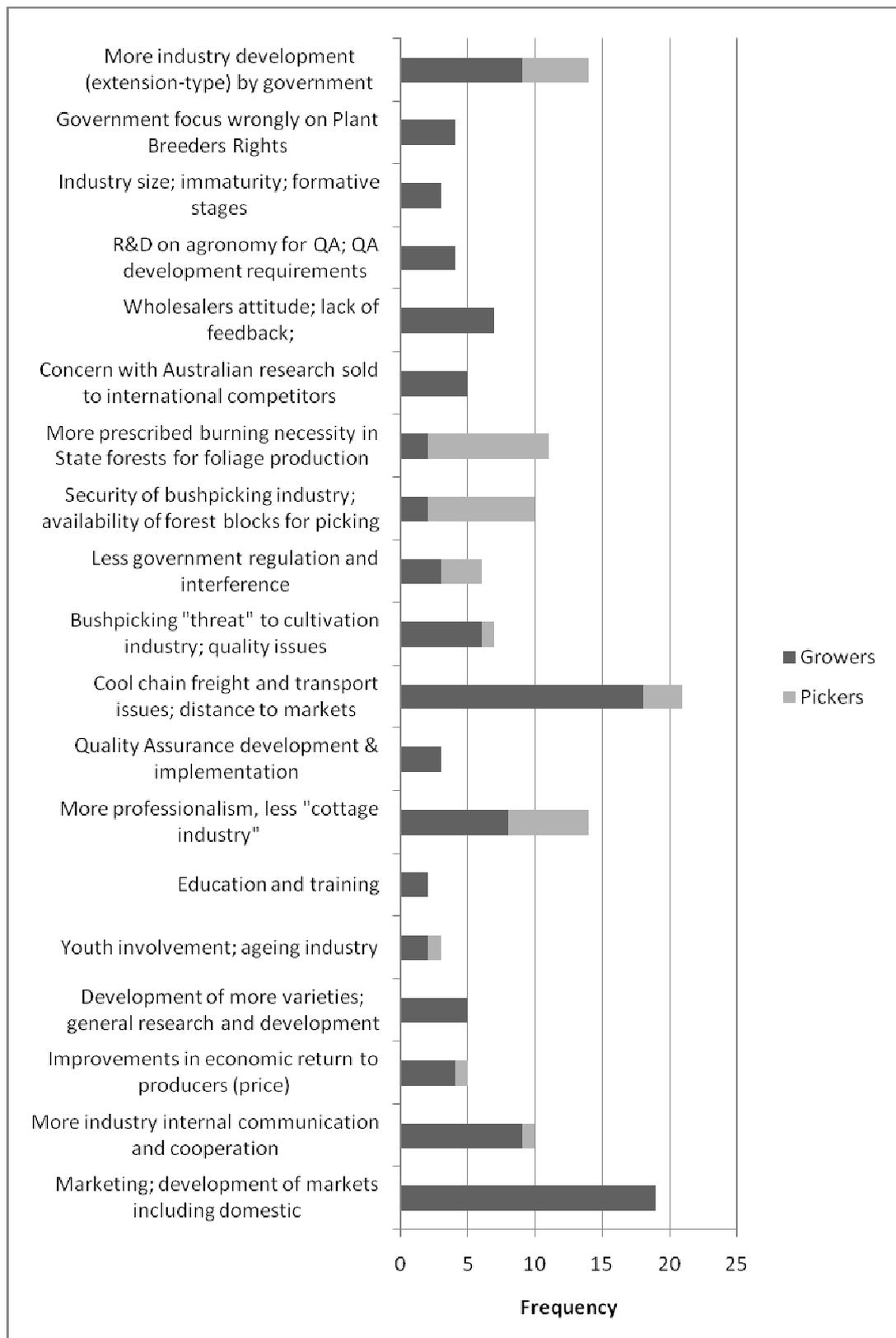


Figure 5.19 Industry Issues – Identified by Producers

Specific agronomic and production issues raised (for example, chemical dosage rates, quarantine and disease management) are grouped under the category of

'Research and Development on Agronomy for Quality Assurance' (R&D on agronomy for QA).

5.2.6 PRODUCER NETWORKS

As described in Chapters Two and Three, this thesis has utilised Actor-Network analysis to inform its assessment of the applicability of the multifunctional rural transition thesis to the southern wildflower industry. As such, understanding both the networks operating in the wildflower industry, and how these influence the actions of industry operators, is essential.

To enable this analysis to occur, questionnaires and interviews enabled the construction of a network diagram which included, but was not limited to, the following segments:

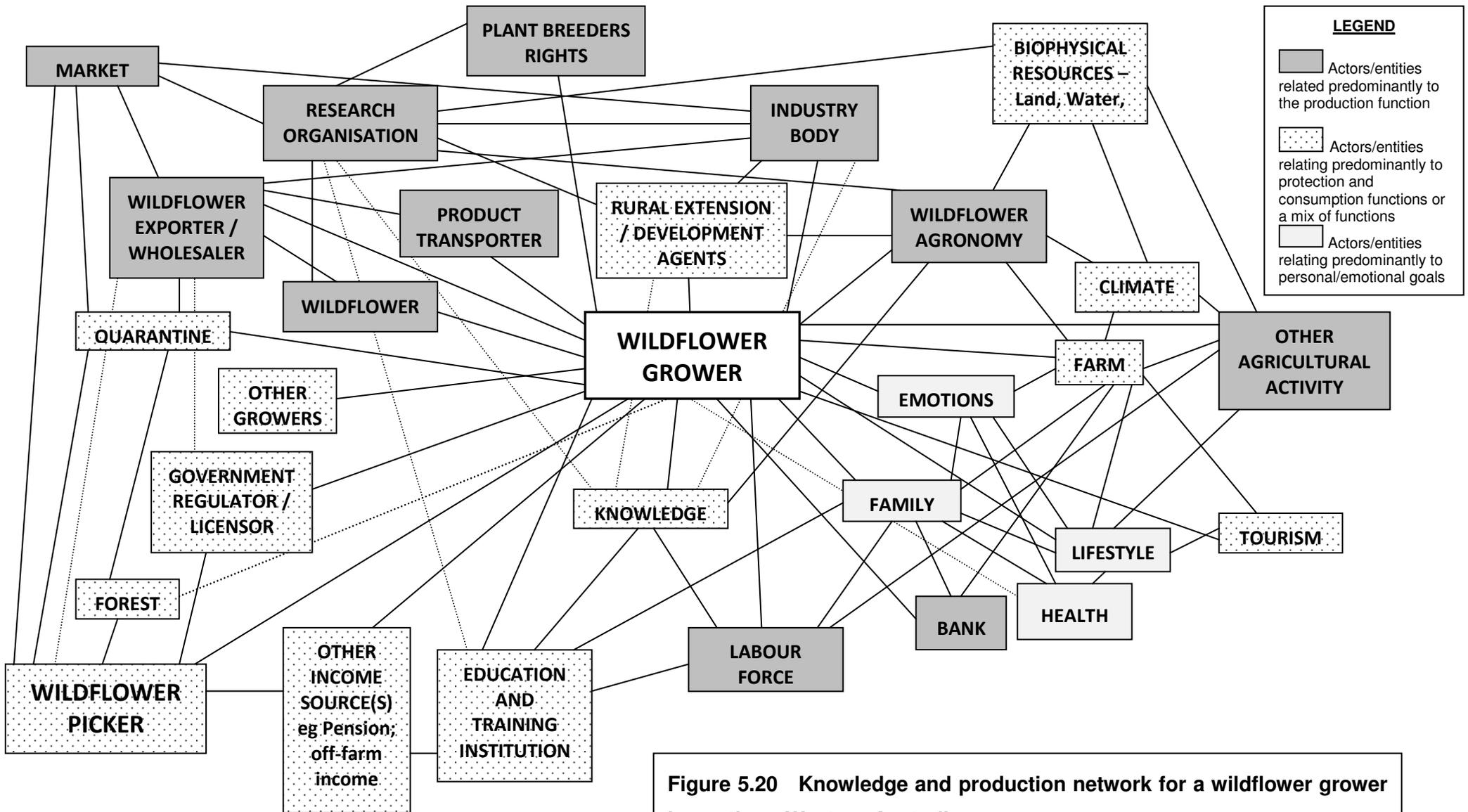
- Information and knowledge sources – for example, industry groups
- Research and development organisations
- Marketing organisations
- Government agencies – development and support agencies; regulators
- Non-human actors – for example, forests.

Figure 5.20 is provided to describe the various sources of information, and the entities who/which impact upon the production of wildflowers in the study region. (It should be noted that the picker and grower entities are somewhat interchangeable in the network diagram). The diagram has been constructed utilising questionnaire and interview responses from producers, and advice from industry support agents and wholesalers/exporters.

Each box within the diagram represents an aspect of the production system, and those aspects of the lifestyle and family situations of a given wildflower producer, which impact upon the overall output of that producer. In line with the 'production, consumption and protection' functions of modern rurality, as discussed in Chapter Two, the boxes within this complex diagram are shaded to represent possible classifications for analysis. The clearest demarcation, as can be seen in the diagram, relates to production functions. For the remainder of the entities in the

network diagram, many of the roles and functions are multi-faceted and cannot clearly be identified as relating to single production, consumption, protection or personal aspirational goals. This diagram is further analysed and discussed in Chapters Six and Seven, providing an example of the utility of actor-network analysis in considering rural change in a contemporary context.

The summary diagram of the networks operating in the southern wildflower industry is presented in Figure 5.20 and discussed further in Chapters Six and Seven.



5.2.7 PRODUCER PERSPECTIVES ON TOURISM

Of 65 questionnaires sent to wildflower growers, only two businesses/individuals reported that they were directly involved in tourism on-property, although an additional four were considering entering the tourism industry. Three of the four 'potential tourism' respondents considered possible future tour bus opportunities (subject to quarantine and disease management on property), while the fourth respondent was interested in future interpretative tours for managed bush stands on property.

In general, the negative responses to questions on tourism opportunities related to risk management (quarantine issues), scale ("we are not big enough") and cost issues (insurance and increased local government rates). The level of investment required to establish a tourism operation was not considered justifiable for the seasonal nature of wildflower tourism – or "two months of the year."

Questions on tourism were not included in the shortened questionnaire which was distributed to wildflower pickers. However, the wildflower pickers interviewed during the research program expressed similar responses – associating tourists with disease risk, with comments such as "Tourists do not go into the forest, they just drive past" (Picker), and expressing concern that the presence of tourists would disturb their personal serenity.

Despite the majority of growers not showing interest in entering the tourism industry, 17 of 28 (60%) of growers indicated that there are benefits for the wildflower industry to be gained from tourism. Specifically, wider public exposure to wildflowers, through tourism, was seen as a positive for the production and sales industry, and linked to multiple comments made regarding the need for greater domestic appreciation of Australian native plants if the industry is to grow.

Interpretation (along the lines of bird-watching), tour buses and on-farm product sales were identified by growers as possible means of linking the wildflower and tourism industries. However, the majority of growers, as noted above, did not foresee personal opportunities from the wildflower industry tourism, even though many hoped that tourism developments by other wildflower business operators would bring them concomitant benefits.

5.3 TOURISM SURVEY RESULTS

As noted in Table 5.1, seventy-two tourism questionnaires were distributed to sixty-six tourism operators and six industry development officers. Thirty-one questionnaires were returned and eight interviews conducted. A former owner of a wildflower retail business in the study region also provided advice and information, via email.

5.3.1 ORGANISATION ROLE IN TOURISM INDUSTRY

Figure 5.21 illustrates the role of the respondents in the tourism industry in the South West and Great Southern Regions.

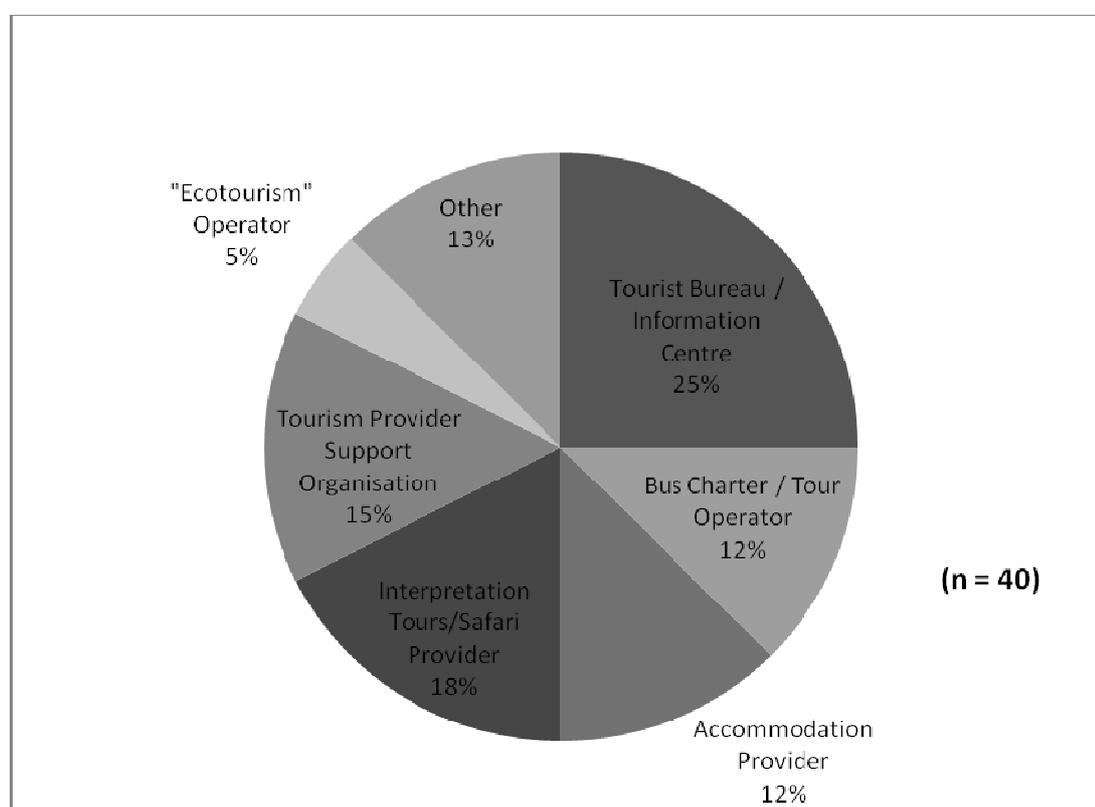


Figure 5.21 Tourism Industry Study Participants

'Other' includes local-scale wildflower display organisers and community-based marketing organisations.

Tourism provider support organisations (that is, industry organisations that support tourism opportunity deliverers), tourist bureaux, and tourist information centres, are

collectively referred to as 'Tourism Support Organisations' in the ongoing analysis. Bus charters, tour operators, interpretation, safari and accommodation providers are referred to as 'Tourism Business Operators.' Overall, both groups are referred to as 'tourism operators'. The distinction between tourism supporters and tourism businesses relates to their role and income sources. Tourism Support Organisations are those which have a function in promoting and supporting general tourism-related activity. Tourism Business Operators are those which have a specific business and income stream from the direct delivery of tourism activities and products.

5.3.2 TIME IN BUSINESS

Tourism Business Operators and tourist bureaux respondents averaged nineteen years and four months in the tourism industry, thereby potentially offering significant depth in the insights and opinions provided.

5.3.3 LOCATION OF TOURISM BUSINESSES

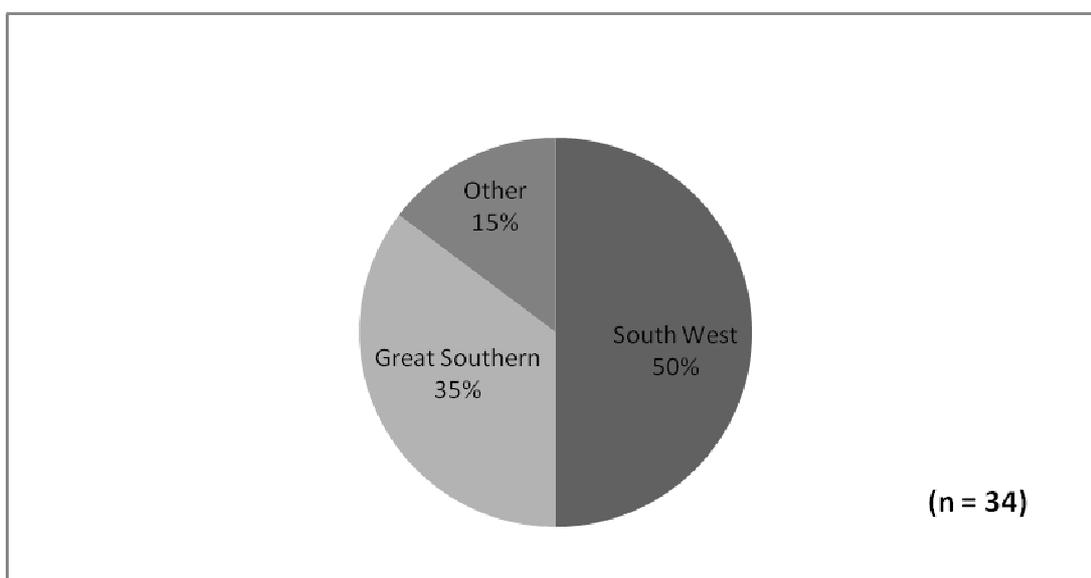


Figure 5.22 Regional Location of Tourism Operators

As illustrated in Figure 5.22 above, half of the tourism survey respondents and interview participants were South West based. The 'Other 15%' refers to organisations which operate from other regions (for example, metropolitan Perth) but deliver wildflower tourism activities in the South West.

5.3.4 CLIENT DEMOGRAPHIC

Tourism operators were asked to nominate the age ranges of the majority of their clients. Figure 5.23 illustrates a summary of the responses. It should be noted that a base of four tourism operators indicating clients of 'all ages' is included in the frequency count for all age ranges.

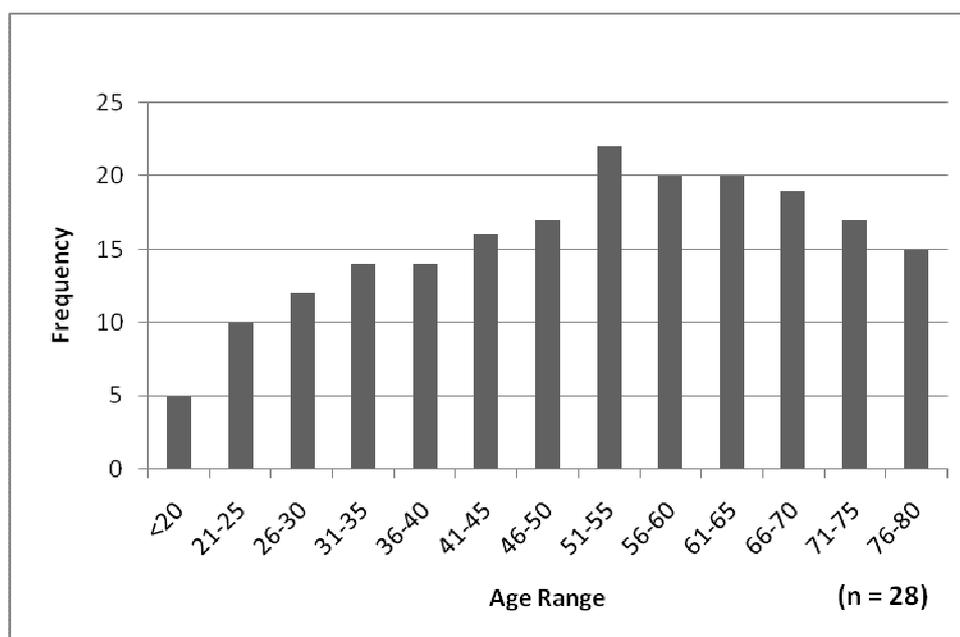


Figure 5.23 Tourism Operators' Client Age Profile

5.3.5 CURRENT WILDFLOWER TOURISM OPPORTUNITIES

Varying responses were received to the question of whether the current (2002) wildflower tourism opportunities in the South West and Great Southern Regions were sufficient, as shown in Figure 5.24.

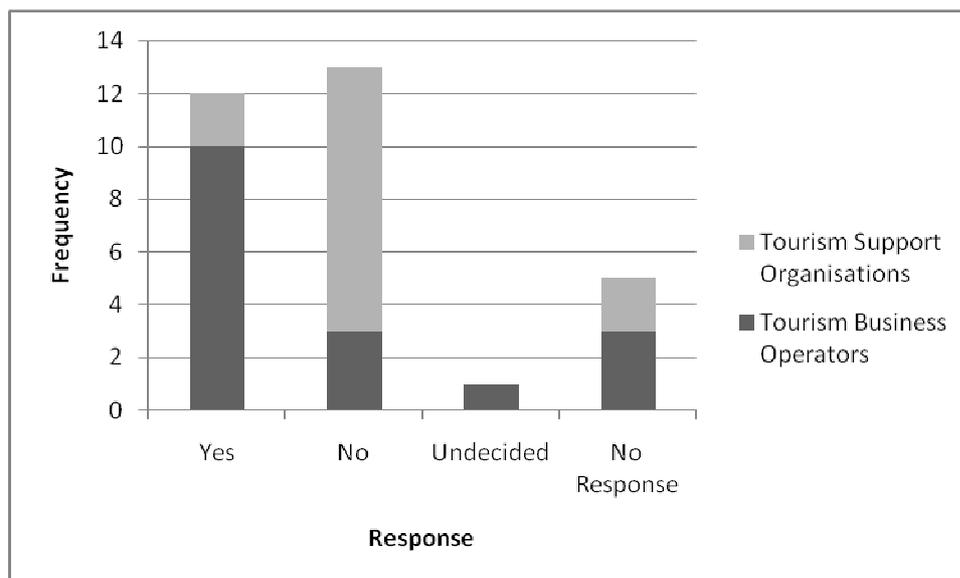


Figure 5.24 Are there sufficient wildflower tourism opportunities for tourists at present?

Notable differences can be seen in the responses given by suppliers (Tourism Business Operators), and those who deal with demand (Tourism Support Organisations). Those who work in the provision of tourism opportunities generally felt there were sufficient wildflower-related opportunities – yet those who deal with demand (from tourists) disagreed. Potential reasons for this discrepancy in opinion, and possible implications of it, are considered in Chapter Six.

5.3.6 NEW OPPORTUNITIES FOR WILDFLOWER TOURISM?

Following from the previous question, respondents were asked where future opportunities for wildflower tourism may lie. In concordance with the responses in Section 5.3.5 indicating that the market has sufficient wildflower tourism opportunities, the majority (16/17) of Tourism Business Operators provided no response to this question of specific opportunities.

Of those survey respondents who did indicate opportunities, interpretative tours, including guided walks, and interpretative information for self-drive tourism, were the most frequently cited opportunities, with seven similar or related responses.

Only one tourism industry survey respondent suggested an opportunity for “a wildflower farm to show people around.” Other one-off suggestions included generic responses such as “getting people to enjoy the countryside”, and “better promotion

of existing facilities.” Interestingly, one tourism support organisation, having suggested initially that there is not enough wildflower tourism in the region, noted that the resources needed “to maximise opportunities” were significant, and that wildflowers do not allow for “a commercially viable ecotourism business.”

Respondents were also asked whether, and how, government assistance could be utilised to support wildflower industry development in the study area. The development and production of interpretative materials, marketing, infrastructure provision, education on conservation awareness, and support with issues such as the cost of insurance for tourism businesses, were all noted as options for possible government input. However, many expressed uncertainty about the existence of a role of government.

5.3.7 GENERAL COMMENTS ON THE WILDFLOWER TOURISM INDUSTRY

Tourism industry participants were given an opportunity to raise general issues relating to wildflower tourism. As with the wildflower producers’ concerns, dieback and the spread of weeds (by tourists) were noted as potential risks. As with previous questions, there were notable differences in the ranges of responses from Tourism Support Organisations and those from Tourism Business Operators.

‘General comments’ from the Tourism Support Organisations were broad and fairly non-specific. No key themes emerged.

Tourism Business Operators who responded to this question were generally focused on issues related to the economic returns from wildflower tourism, the level of market saturation, and business risks. Specific comments included:

“Wildflower tourism only has limited potential for smaller operators, and particularly those who operate tours. This comment is based on the seasonal nature of how “wildflower” tourism is marketed.” (Interpretative bushwalks operator).

“I feel very little has been done specifically with wildflower tourism because people have found it impossible to make a living from wildflower tourism; [they] have to work elsewhere [and] eventually it all becomes too hard” (Accommodation provider and dried wildflower seller).

“WA [Western Australia] has been advertising wildflowers for 35 years. In the last 10 years, advertising has decreased. This could be expanded but I don’t believe it will deliver further growth. Many tour operators and self-drive (sic) take advantage of wildflower tourism. I believe that it has reached its peak.” (Tour-bus operator).

These comments contain overtones of risk management and some negativity (which must also be placed in the context of an environment of commerce, competition and possible self-interest). However, the business sustainability issues underpinning these comments are very important when considering future tourism opportunities (if any) for the wildflower industry, and these are discussed further in Chapters Six and Eight.

5.4 EXPORTER AND WHOLESALER INTERVIEW FINDINGS

Three interviews were conducted with wildflower wholesalers/exporters. Further, written advice was provided by another exporter via email.

5.4.1 ISSUES RAISED

The following issues were raised in correspondence and interviews:

5.4.1.1 CONTINUATION OF FOREST ACCESS FOR PICKERS

The wholesalers/exporters consulted felt strongly that bushpicked wildflowers and foliage were essential for Western Australian market presence (volume) in the global cut flower arena, and that access to State Forests for sourcing flowers remained essential. The respondents argued that the cultivation industry (growers) need bushpicked product for market volume, and that the growers did not understand the overall marketing system in which the bushpicked product plays an important role. In particular, foliage from the bush was seen as fundamental to market volume, because it was in production for the full year (as opposed to the seasonal productivity of wildflowers), and could only be sourced from native stands of bush. Without the bush-sourced foliage exports, Western Australia’s place in the global market would be significantly threatened.

The respondents felt that the picking industry was very well regulated, had an environmentally concerned approach, and was quite ecologically sustainable. As

noted earlier, at the time of this research, the Government of Western Australia was working towards a Forest Management Plan which could have potentially restricted areas of access for picking. One wholesaler in particular was adamant that the restriction of picker access to State Forests was “not a foregone conclusion”, and was lobbying, with other industry participants, to ensure that the wildflower and foliage harvested was not neglected in the Forest Management Plan negotiations.

5.4.1.2 SUPPORT FOR PRODUCERS

Wholesalers/exporters consulted during this study recognised their role in providing advice to pickers and growers on market requirements, and often on agronomic issues (for growers). They also noted that this generally applied to small-scale producers, since larger-scale growers tended to have more direct contact with their markets.

The wholesalers/exporters indicated that smaller-scale producers do not necessarily want direct contact with the market, and that there is a comfort level and confidence associated with supplying to wholesalers who in turn liaise with markets. As one wholesaler noted, “Pickers go out and pick – they don’t worry about what is going on in the industry. They deliver here and they get paid, they don’t have to market it. They like that.” (Wholesaler).

5.4.1.3 INDUSTRY FUTURE

One wholesaler felt that the wildflower industry had stalled to a certain extent, partly related to the recent change of State Government to Australian Labor Party control, (which was subsequently reversed in 2008), and the consequent development of the Forest Management Plan, as noted earlier.

Wholesalers/exporters also suggested (as did many producers) that a recent industry and government research focus on wax species, not suited to South West and Great Southern climatic conditions, also greatly (and negatively) affected the opportunities for the southern wildflower industry. One respondent noted that there could be opportunities from researching non-endemic species (such as interstate and South African species), determining their suitability to southern climatic and soil conditions, and testing their marketability.

Access to plant rootstock that suited southern conditions was also identified by wholesalers/exporters as an issue impeding industry growth in the South West and Great Southern Regions.

It was also suggested by wholesalers/exporters that government support could be directed towards solving some problems that exist in the wildflower cultivation industry – for example, the use of chemicals “often without guidelines, rules, or withholding periods” (Wholesaler). This concern was also raised by a number of growers in discussions about quality assurance and agronomy.

Finally, the wholesalers/exporters raised concerns over trends towards the “pre-occupation with intellectual property ‘protection’ against propagation” by government research agencies. This issue was similarly raised by many producers and identified as an impediment to industry growth.

5.4.2 RESEARCHER OBSERVATIONS

A number of industry support officers consulted during the research program indicated that wholesalers/exporters may act as ‘gatekeepers’, potentially affecting the study outcomes by influencing producer responses. With this in mind, the importance of securing in-principle support for the research was evident. However, a valuable outcome of consulting with wholesalers/exporters was that it reassured producers that the study was not simply a case of ‘big brother watching them’ – particularly for wildflower pickers who were concerned for the future of their industry, specifically in relation to government regulation.

What emerged during the survey phase was an indication of parent-child like relationships, whereby the wholesalers/exporters played a senior, guiding role in their interactions with the producers. As a result, it became clear that gaining wholesaler/exporter confidence, if not support, was essential in order to secure producer participation.

5.5 OBSERVATIONS FROM INDUSTRY SUPPORT OFFICERS

The term ‘industry support officer’ refers to development officers, researchers (from universities and government agencies), and other persons employed to work with and/or for wildflower producers in overall efforts to develop the industry.

Interviews were conducted with twenty wildflower industry support officers (ISOs), and three tourism industry officers, all identified through snowballing techniques. (The interview contributions of the tourism support officers are presented here as additional information to the survey questionnaire responses already provided in Section 5.3). Officers were asked questions regarding their view of the industry, key persons with whom to communicate and issues affecting industry development. Furthermore, input and advice regarding survey and interview questions for producers was sought where appropriate. As a result, a number of questions asked provided information of use to industry support organisations in their activities with producers.

A number of common themes and issues emerged from discussions with ISOs. These are presented below:

5.5.1 INDUSTRY PROFESSIONALISM

Multiple respondents commented on what was described as a “cottage industry mentality” within the wildflower industry, and a need for increased professionalism. Wildflower producers were compared adversely with producers in Western Australia’s southern wine regions, with comments made that wine producers are generally more educated and more inclined to conduct their own research. Industry support officers did not believe this was the case across the wildflower industry, and was an impediment to success and growth. “Too many part-timers, with no money, a ‘bushpick mentality’, and not running it like a business” (Industry Support Officer) was one comment; similar sentiments were expressed by other officers.

It was also stated that wildflower growers are “very bad at knowing what they want”, and that this further restricts industry development.

Many industry support officers had predicted the non-participation of larger-scale growers in the survey, as a result of previous experiences and (negative) history between professional growers and industry support officers/research organisations. It was also noted that, because government and/or research assistance was seldom available when many professional growers established their businesses, many producers have developed a ‘do it yourself’ approach, and a resistance to sharing their experiences with their competitors.

5.5.2 INDUSTRY DEMOGRAPHICS

The age profile of growers was discussed by many industry support officers, who indicated that the ageing demographic was not conducive to a positive long term future for the industry.

5.5.3 INDUSTRY RESOURCES

At the time of the research program, a number of industry support officers recognised the shortage of regionally-specific advice and information in relation to wildflower cultivation and wildflower business development. It was noted that some organisations (for example, the Department of Agriculture and Flowerswest) were aiming to develop more professional materials for growers to use in decision-making. This intent was manifested in the development of a number of industry support initiatives post-2001 by the Department of Agriculture, including a project to benchmark production levels for future assessment and evaluation. The overall goal of this approach was to facilitate industry participants and organisations to drive and manage their own research and development.

5.5.4 RESEARCH FOCUS

As with the concerns expressed by many growers and wholesalers/exporters, many industry support officers commented on the research focus, at the time of this study, on wax species due to the strong export demand for this product. However, the cultivation of wax plants is not suited to the heavier soils and colder climates of the South West and Great Southern regions as compared to other parts of Western Australia, and thus the southern regions did not benefit directly from this research.

Additionally, some industry support officers sided with growers over concerns regarding an apparent focus of research organisations on securing plant breeder's rights (PBRs) for formal researchers, without adequate acknowledgement of the effort that growers put into trialling new varieties. This, it was felt, compounded the resentment felt by some growers towards research organisations, to the detriment of the industry. Concerns were also raised over the politics of government agencies competing with private research organisations and industry groups in developing plant varieties for commercial gain.

Further, many comments were made that the wildflower industry needed to drive its own research and development (R&D) program, and that it was not up to government to drive it. This, it was felt, was not assisted by the relative immaturity of the industry and its small size. This 'immaturity' was also implicated in a comment made that the industry does not (yet) have the capacity to pay royalties on plant varieties, thus further impeding potential development.

5.5.5 GATEKEEPERS

Many industry support officers discussed the existence of industry "gatekeepers" and the need to "test all the information" that certain gatekeepers provide.

Gatekeepers, in the context of this research, are those individuals or organisations within the wildflower industry who/which influence the thinking of others. In this case, it was suggested, prior to the undertaking of this empirical research, that the gatekeepers included certain industry support officers, larger growers, and wholesalers/exporters. Such individuals, it was argued, may have affected the potential outcomes of the research by either influencing the participation rates of wildflower producers, influencing the contributions that participating producers made, or providing limited information that may not be entirely accurate.

The risk of obtaining potentially inaccurate or biased answers was considered throughout the research program, and it was noted that 'gatekeepers' also existed within the group of industry support officers who provided the warnings about others!

5.5.6 TOURISM

Industry support officers provided a range of insights into tourism opportunities for the wildflower industry. It was noted that tourism businesses could not easily develop on wildflowers alone because of the seasonality of the industry. It was suggested that there was an opportunity for Regional Development Commissions to play a role in linking tourism and wildflower businesses with mutually beneficial outcomes.

As with tourism operators and some producers, the ISOs saw potential opportunities in interpretative services, subject to good, accurate interpretative information being available.

The self-drive nature of wildflower tourism was seen as a potential impediment to tourism enterprises profiting from wildflowers, because it was seen as difficult to compete with, or for, the self-drive market.

In general, tourism was seen by the industry support officers as a positive for the wildflower industry. However, the practicalities of linking tourism to wildflower production enterprises (for example, disease risk) were commonly raised.

5.5.7 ENVIRONMENTAL CHANGE

The implications of changing environmental management policies, such as through the Forest Management Plan, were frequently speculated upon and discussed by the industry support officers interviewed as part of the research.

The impact of increasing salinity in the South West and Great Southern Regions was linked to opportunities for wildflowers and tourism, if it could be managed correctly. One researcher suggested salt-resistant wildflower species, if developed and cultivated in saline areas, could provide opportunities for regional income growth and development through production and tourism interest.

5.5.8 INDUSTRY DEVELOPMENT

Several industry support officers provided advice on a variety of agricultural industry development activities occurring in the study region, particularly in the Great Southern. Linkages to Indigenous Tourism, including through bush-food type activities, were suggested.

In relation to broader economic development, it was also noted that globalisation means that the wildflower industry cannot make mistakes and expect to keep its markets. Industry cooperation was thus seen by many officers as essential.

5.5.9 MARKETING AND BRANDING

Most industry support officers suggested that branding is (urgently) needed if wildflower industry expansion is to occur. The relatively small size of the industry in Western Australia was seen as an impediment to financing the marketing and branding required.

There was also a suggestion for more mature and focused marketing. For example, it was suggested that the Kangaroo Paw, native to southern Western Australia, could be marketed as a flower for men.

Further impediments to wildflower industry development, recognised by industry support officers, include the increasing level of competition for the consumer “luxury” dollar. The ‘real’ competition was seen to be anything the consumer might buy that is considered a luxury or non-essential item.

Competition with less developed countries, where Australian native plants could be produced at much cheaper rates due to lower labour costs, was also discussed by many officers as a significant issue. Opportunities for innovative marketing by capitalising on a perception of Australian produce as ‘clean and green’, were advocated.

Many industry support officers emphasised the fundamental importance of increasing the public consciousness of Australian wildflowers. This was echoed by many producers and thus links back to the issue of the development of wildflower tourism.

5.5.10 OTHER ISSUES

Some industry support officers suggested that the smaller-scale growers need assistance with access to markets, need skills improvement to access markets, and that there may be a need for alliances between small growers. However, while the industry remains small and its capacity for change is limited, this role tends to be taken by the wholesalers/exporters who market the products.

Further suggestions by industry support officers included the need to beware of romanticism and to take a business perspective when considering the wildflower industry and its future in the South West and Great Southern Regions.

5.6 CHAPTER SUMMARY

This chapter has summarised the relevant data gathered from wildflower producers, tourism operators, industry support agents, wholesalers and exporters, during the research program.

Chapter Six considers this information in its entirety, and presents an overall picture of the wildflower industry from the participants' perspectives, in an attempt to determine the factors driving change in the southern wildflower industry, and the opportunities (if any) for wildflower-related tourism development in the study area. This analysis then informs the multifunctional rural transition discussion presented in Chapter Seven, which considers the wildflower industry within the wider context of rural change in a developed economy.

CHAPTER SIX – IMPLICATIONS OF STRUCTURE AND AGENCY RELATIONS WITHIN THE WILDFLOWER INDUSTRY

6.0 CHAPTER OVERVIEW

This chapter discusses the data summarised in Chapter Five in relation to the objectives of the research, utilising firstly a political economy assessment and then an actor-network analytical approach. Lifestyle and tourism issues are considered in depth. The actor-network analysis then assists with the contextualisation of this study in relation to theories of multifunctional rural transition as discussed in Chapter Seven.

The data provided in Chapter Five are considered within a political economy, or structural, assessment, to identify where broader, exogenous issues impact upon wildflower producer decision-making, and thus on the contribution that can be made by individual producers to the industry. This assessment is then complemented by a consideration of the actor-network relationships present within the southern wildflower industry, and how changes to the nature of these relationships can affect industry outcomes to varying degrees. This actor-network appraisal supports the multifunctionality discussion provided later in Chapter Seven.

6.1 ECONOMIC, SOCIAL AND DEMOGRAPHIC FACTORS

6.1.1 CONSTRUCTING A DEMOGRAPHIC PICTURE OF THE WILDFLOWER INDUSTRY

The mode age bracket for both wildflower pickers and growers is 50-54 years, with a lower but still significant peak for pickers in the 65+ age bracket (Figure 5.1).

For growers, correlations may be drawn between the proportion in the 50-54 years age bracket and the proportion of participants possessing freehold land title (Figure 5.8), suggesting that age-related relative economic stability (identified through their land freehold status) may influence their ability to participate in the industry, by minimising risks associated with entering a new industry through minimal financial borrowing. In addition, the large proportion of growers (61%) noting their previous

place of residence as “always farming,” “the same” or a nearby locality (Figure 5.5), contributes to the notion that the bulk of growers have at least a rural, if not an agricultural, background or set of experiences, and access to agricultural equipment and/or land (and potentially water) resources. It is, however, interesting that, 47% of growers considered themselves “newcomers” to the wildflower industry, even when the production of wildflowers was in addition to existing and sometimes similar farming operations (for example, cropping or horticulture).

Given these data, it is possible to conclude that a typical wildflower grower may be aged approximately 50-54 years old, have freehold land title and is likely to be an existing farmer or from a rural area (see Figures 5.4, 5.5, 5.12). Unfortunately, possibly due to the relatively small contribution of wildflowers to agricultural income for Western Australia or Australia when compared with other agricultural industries, official demographic statistics relating specifically to wildflower producers are unavailable. Therefore, it is difficult to show trends in the industry’s demographic profile. Future research may provide an opportunity for comparison with this current study to note any changes.

Nevertheless it is probable that the number of wildflower producers in the South West and Great Southern regions will continue to decline, unless there is an increase in the number of younger participants. Australian Bureau of Statistics data (see Figure 4.1) indicate a 13.4% decline in the number of agricultural establishments producing cut flowers or seed in Western Australia during the period 2000 to 2003 (ABS 2004)¹. Producer age demographics, in line with trends in other agricultural industries where the average age of farmers is increasing, may be a factor in this decline. There is the additional possibility of some industry consolidation occurring, resulting in declining business numbers. However, the small scale of wildflower production businesses within the study area suggests this has not occurred here to any great extent. This is further supported by the fact that only single sites of cultivation were identified by growers participating in this research.

¹*Between 2003 and 2007, the number of floriculture producers further declined from 130 to 88 in Western Australia. Refer to the post-script following Chapter Ten for a broader summary of changes in the wildflower industry in the time since this research was undertaken. The 2003 figure provided includes seed producers, whereas the 2007 relates to floriculture businesses alone. This difference is due to changes in ABS data recording. Specific numbers of seed producers in 2007 were unavailable for an accurate calculation and comparison to be made.*

With the wildflower pickers, most participants were in the 50-54 and 65+ age brackets (Figure 5.1). Interestingly, when asked if they would like to earn more from wildflowers, significantly more pickers than growers said 'no' or were undecided (Figure 5.11), although the majority of pickers were nonetheless in favour of increased income. The negative and undecided responses could be linked in a number of ways to the age of the participants.

One possibility is that, given the very physically demanding nature of wildflower picking, many participants associated increased income with increased production capacity and a larger workload. This theme emerged from a number of interviews with wildflower pickers. Age and age-related declining physical ability ("I'm too old") was frequently cited as a factor in the relative satisfaction with current income levels. The issue relates directly to the concept of balancing work and lifestyle, whereby any increased (physical and temporal) effort to increase income was considered to negatively affect the lifestyle of the producer. Similarly, for wildflower growers, when asked if they wanted to increase their incomes from flowers, 35% indicated an income increase of less than \$20,000 per annum would be satisfactory (Figure 5.11). This figure equated to approximately half the average annual earnings for all Australian employees (full-time and part-time) in May 2002 (ABS 2003a). Lifestyle balance was frequently cited as a reason for this level of desired wildflower income. Further discussion on lifestyle issues is provided in Section 6.2.

Worth noting is the gender balance (growers) and imbalance (pickers) identified in the data review. For wildflower growers, the gender balance is roughly even (see Figure 5.2). Furthermore, the data reveal twice as many couples/partnerships involved in cultivation, as opposed to the number of couples picking wildflowers. For pickers, a 2:1 ratio of males to females was observed.

The gender differences between growers and pickers may be related to a number of factors. The existence of the gender balance amongst growers was related to 'family farm' arrangements for those growers involved in other agricultural activity and/or who identify as being existing farmers. For "family farm" businesses, many growers indicated the extension of an interest or passion for native plants, often on behalf of the female farm proprietor, as part of the impetus for considering wildflower production in their diversification strategies.

Gender imbalances in the group of pickers cannot be easily explained by factors considered in this research. The physically demanding nature of the work may be related, particularly given the age of participants. It is possible that older women may be less inclined and potentially less physically capable of undertaking the wildflower harvesting tasks, particularly for those in the 65+ age bracket.

For both pickers and growers, most have additional income from agriculture/farming. Approximately 20% of the pickers consulted are also unskilled or semi-skilled labourers (Figure 5.12), which may include farm labour. However, for most pickers, income from wildflowers is their sole source of income, and a much larger number of pickers (as compared with growers) indicated a desire for more income from wildflowers (Figure 5.11).

Only four of 28 growers considered themselves to be full-time professional wildflower producers, with another two identifying as part-time professionals – a total of 28% (Table 5.3). This compares with 80% of pickers identifying as professionals, with the majority of pickers also noting picking as their sole source of income (Figure 5.12). The explanation for this high proportion may relate to the industry politics occurring during the study period. The Commonwealth-State Regional Forest Agreement negotiations were undertaken in the years prior to the study period (The Commonwealth of Australia and The State of Western Australia 1999; Rohl 2001), and a Forest Management Plan was being developed for forested areas of the regions at the time this research was being undertaken (Conservation Commission of Western Australia 2003). (The structural implications of forest management planning upon wildflower industry development are considered in Chapter Eight).

Within the picker network, there was significant concern (Figure 5.19) regarding future access to State Forest blocks for commercial picking. Pickers responding to the survey questionnaire and participating in interviews were very keen for this concern to be voiced, and this may have contributed positively to the rate of interest in participating in this research. The implication is that those who did respond may have done so with this political agenda in mind, having appreciated the opportunity to raise the issue and potentially to influence the policy discussions occurring at the time.

The implications of this demographic analysis, in relation to industry development and future opportunities for individuals within the industry, are complex. With 57%

of wildflower producers in the South West and Great Southern regions aged over 50, and with a large proportion of industry participants not wishing to significantly increase their income or production capacity, the opportunities for industry expansion with the set of producers surveyed and interviewed in this research, seem very limited. This is further discussed in Section 6.3 in relation to wildflower tourism development.

Further implications relate to the lifestyle factors identified by producers, either directly or indirectly through their answers. The lifestyle factors are considered in depth in Section 6.2, and discussed further in Chapter Seven in relation to the multifunctional rural transition framework.

6.1.2 THE POLITICAL ECONOMY OF THE WILDFLOWER INDUSTRY

As discussed in the initial chapters of this thesis, consideration of the political economy of the wildflower industry has the ability to assist in understanding the current state of the industry, and its future opportunities, at a macro-level.

Multiple factors must be considered when discussing the political economy of the southern wildflower industry. The network diagram (Figure 5.20) provides, amongst other things, a graphic representation of some of the entities involved in the commodity chain for wildflower production in Western Australia. Table 6.1 provides a description of the roles and influences of some of the entities summarised in Figure 5.20, in relation to the supply chain for wildflower products from southern Western Australia. It provides context at a macro-scale to facilitate insight into the political and economic factors affecting the South West and Great Southern wildflower producers.

This information generally relates to Statewide, national and global influences. A brief local level political economy analysis is undertaken following this table, with specific reference to the data presented in Chapter Five – that is, the data provided by the participants themselves in relation to the production, marketing and sales systems in which they operate.

Table 6.1 Summary of influences in the political economy of Western Australia's wildflower industry

ENTITY	ROLE IN INDUSTRY	INFLUENCE	SCALE OF INFLUENCE
Government of Western Australia (Department of Conservation and Land Management, Western Australian Flora Industry Advisory Committee, and Minister for the Environment).	<p>Regulator. Licensing of production (and harvesting) of species endemic to Western Australia.</p> <p>Implementation of the <i>Western Australian Wildlife Conservation Act 1950</i>.</p> <p>Implementation of the <i>Conservation and Land Management (CALM) Act 1984</i> and <i>CALM Amendment Act 2000</i>.</p> <p>Implementation of the <i>Forest Management Regulations 1993</i>.</p> <p>Implementation of the <i>Regional Forest Agreement 1999</i>.</p>	Essential. All growers and pickers must comply with licensing regulations.	Statewide.
Australian Government (Australian Quarantine Inspection Service).	Quarantine inspection services and biosecurity responsibilities. Establishment and maintenance of quarantine guidelines and requirements.	Essential. All exports must comply with national (and international) quarantine standards.	National (with global obligations).
Government of Western Australia (Department of Agriculture).	<p>Plant variety breeding; extension of industry information.</p> <p><i>Agriculture and Veterinary Chemicals (Western Australia) Act 1995</i></p>	<p>Variable. Producer engagement with the Department of Agriculture is optional.</p> <p>Producer compliance with Act is mandatory.</p>	Variable at state level.
Flower Export Council of Australia (FECA), now known as Australian Flower Export Council (AFEC),	Facilitating a united marketing approach for Australian flowers overseas.	Nationally significant in relation to establishing and supporting new markets.	International

Table 6.1 Summary of influences in the political economy of Western Australia's wildflower industry (continued)

ENTITY	ROLE IN INDUSTRY	INFLUENCE	SCALE OF INFLUENCE
Competitors – national, international.	Produce equivalent wildflower product.	Significant influence on market supply and returns to growers.	Global
Export markets (for example, China, USA, Taiwan, Japan) – international consumers.	International demand for product.	Influence species produced via market demand.	International.
Product transporters – international.	Cool-chain delivery of product to international markets.	Significant. Any failure in the cool-chain transport system significantly affects product quality and marketability and thus returns to producers.	International
Product wholesalers.	Purchase product from growers/pickers for direct export or on-sale to exporters.	Variable. May provide (quasi-extension) advice to growers in relation to market demand and necessary responses, quality assurance, and other product expectations.	Variable at state level.
Product exporters.	Purchase direct from growers/pickers and wholesalers for exporting.	Significant.	National / international.
Research Organisations (for example, Centre for Australian Plants; Rural Industries Research and Development Corporation; Department of Agriculture).	Plant variety breeding and/or industry development functions.	Moderate. (Many producers indicated that the influence of the research organisations' own priorities negatively impacted the development of industry opportunities for the South West and Great Southern Regions).	Variable dependent upon responsiveness to global demand.
Product transporters – local/domestic.	Cool-chain delivery of product to regional, state or national markets, wholesalers or exporters.	Significant. Any failure in the cool-chain transport system significantly affects product quality and marketability and thus returns to producers.	Statewide/national.

Table 6.1 Summary of influences in the political economy of Western Australia's wildflower industry (continued)

ENTITY	ROLE IN INDUSTRY	INFLUENCE	SCALE OF INFLUENCE
Local marketers, distributors.	Distribution and sale at local level.	May advise growers on local market requirements	Statewide / local.
Local florists, consumers.	Sale and purchase of product.	Small. The domestic market is a minor player compared to international export markets. Limited ability to affect supply at a broad scale.	Statewide / local.
Flowerswest.	Industry group established to develop the cut flower industry in Western Australia via facilitating relationships between other actors in the industry. (Flowerswest has since ceased operations).	Moderate. As a voluntary organisation, direct ability to influence the industry was limited. However, Flowerswest did have the ability to facilitate discussions between relevant organisations.	Statewide.
Labour market.	Labour supply as needed for cultivation, picking and packing.	Variable dependent upon individual producer circumstances and supply of and demand for local (largely unskilled) labour.	Local.
Government of Western Australia (Water and Rivers Commission – now called Department of Water).	Allocation and licensing of water for production purposes. Implementation of <i>Rights in Water and Irrigation Act 1914</i> .	All water usage for irrigated agriculture should be under licence and allocation. (NB: There was limited grower awareness of or indication of adherence to this requirement during the data collection period).	Statewide.
Government of Western Australia (Department of Planning and Infrastructure).	Planning policy development and decision-making for intensive land use. Implementation of the <i>Town Planning and Development Act 1928</i> (since repealed and replaced by the <i>Planning and Development Act 2005</i>).	Potential influence over land use planning approvals for intensive agriculture and horticulture. (NB: There was limited grower recognition of or indication of adherence to this regulatory planning responsibility during the data collection period).	Statewide.

Table 6.1 Summary of influences in the political economy of Western Australia's wildflower industry (continued)

ENTITY	ROLE IN INDUSTRY	INFLUENCE	SCALE OF INFLUENCE
Local Government.	Development and implementation of local planning strategies, which include policies and zoning for intensive agriculture.	Potential influence over land use planning approvals for intensive agriculture and horticulture. (NB: There was limited grower recognition of this local government responsibility during the data collection period).	Local
Wildflower growers.	Production of wildflowers and foliage.	Minor. Producers are price-takers and need to be able to adapt to market demand.	Minimal
Wildflower pickers.	Picking and supply of wildflowers and foliage.	Minor. Producers are price-takers and need to be able to adapt to market demand.	Minimal

It is noteworthy that the government legislative and regulatory functions at local, state and national level mentioned in Table 6.1 were identified by research participants as having variable, but mostly limited, influence. Where government responsibilities were noted, it was generally with negative overtones, and often within the context of “big brother is watching”. This tone was also noted in discussions with wholesalers (many of whom were identified as “gatekeepers” by industry support officers). The implications of this for any future state-supported¹ industry development are significant, particularly if participants are not trusting of government involvement, and only see government as a hindrance.

Furthermore, the limited producer recognition of planning and water allocation licensing requirements raises issues for consideration in future industry development. As southern Western Australia shifts towards a drying environment, water supply and allocation are becoming major priorities across the state (Government of Western Australia 2003). Agricultural industries, including all forms of extensive horticulture, are not exempt from licensing requirements. However, at the time of the research there was very little appreciation of this requirement by producers.

Producers were more familiar with government land use planning requirements, although mostly in relation to local government and not necessarily state planning policies and requirements. In particular, local government planning issues were raised where there were perceived negative impacts on individual wildflower businesses and on efforts by producers to diversify into other industries on their properties (for example, tourist accommodation).

While the commodity chain consideration and political economy explanations provided in Table 6.1 broadly account for the macro-economic context within which a wildflower producer may operate, localised or micro-level factors play an important role in determining the extent to which producers participate in the industry. This aligns with Wilson’s (2001) recommendation that additional substance can be added to macro-level political economy assessments by the analysis of local behaviours and values.

¹ *The possibility of future state-supported industry development is mentioned due to the interest of the industry partners, the Department of Agriculture and the South West Development Commission, both*

Consideration of a number of the data sets provided in Chapter Five may assist in an understanding of the wildflower industry at the local level in order to add value to the broader political economy review. Issues to consider include behavioural factors, motivations, and local level influences which may affect the decision-making of producers.

One such factor is local power-sharing arrangements and the existence of parent-child-like relationships within the industry became evident as the research progressed. Information regarding local power structures emerged in multiple ways during the research program. The suggestion that a parent-child relationship exists at the local level is in reference to the informal arrangements between producers and local wholesalers or exporters.

One source of data which supports this suggestion emanates from the responses to the question “do you consider yourself to be experienced or a newcomer to the wildflower industry?” asked of growers (see Figures 5.6, 5.7 and Section 5.2.2.5). For those growers who identified themselves as newcomers, supplementary questions regarding the impact of this status on their industry involvement were asked. The proposition was supported by information from extension officers working with the wildflower industry, who advised that many growers receive growing and marketing advice from wholesalers. As discussed earlier in this thesis, some officers working with the industry also suggested the possibility that some wholesalers acted as ‘gatekeepers’ and had the power (within their relationships with producers) to guide producer behaviour – including how producers responded to this research program. Again, this behaviour, which was noted when conducting the research, supports the view that a parent-child type of relationship exists here.

A clear example of the influence of gatekeepers on the research program is the direct admittance by some producers that they had spoken with their wholesaler prior to agreeing to participate in the research. Such producers indicated that they had requested advice on whether to participate (suggesting a parent-child “permission” or “approval” scenario). This advice included the appropriate level of response to give to the research questions, particularly within the context of what

State Government agencies, in investigating opportunities for supporting wildflower industry development.

could almost be termed paranoia about government and regulator investigation of the industry.

Moreover, the responses listed in Section 5.2.2.5 of this thesis in relation to poor information sharing between growers (competitors) across horizontal networks, and limited agronomic information availability, align with many specific comments from growers and pickers that market advice was predominantly sourced from local wholesalers. It appears this is due to necessity (that is, from a perceived lack of alternative options), and possibly to a preference for accessing information at a relatively simple and immediate level. The industry relationships exposed through the research thus point to few horizontal linkages for advice and information between producers, and a strong reliance on vertical structures, through the supply chain. There was no indication that wholesalers either encouraged or discouraged communication between producers. In hindsight, investigating the extent to which communication was encouraged by wholesalers at the local supply level may have shed some greater light on this issue.

The commercially competitive nature of agricultural production may provide an explanation for the apparent reluctance on the part of existing growers to support new entrants with shared information and advice. This is understandable, given that new entrants are potential competitors to existing producers. While increased volumes of production may increase the bulk or volume of Australian product on the export market, it can similarly reduce the per stem price paid to growers if markets become saturated. However, there may be an alternative explanation in that some longer term or more professional growers assumed a status differential between themselves and new entrants, and were not prepared to spend valuable time and energy providing advice to them. This factor extends beyond the basic competition argument, into one more related to time, the assumption of class superiority, and a disinterest in 'wasting one's time' providing advice, particularly to smaller-scale operators who may potentially add to the cottage-industry perception clouding the industry.

A further local-scale consideration affecting the political economy of wildflower production is the property size and area cultivated (Figure 5.9). While there was some correlation between property size and area cultivated ($R^2 = 0.22$), a cluster of 13 (of 18) properties for which these variables were indicated showed cultivation at less than five hectares, regardless of property size.

The question that arises is whether five hectares in production is the upper manageable limit for wildflowers without the need to recruit labour. That is, is five hectares a manageable size for an individual or family business unit? For wildflower businesses that do not employ labour (the majority), possible explanations for maintaining a production area at five hectares or less include

- the recurrent income from the business is insufficient to employ additional labour;
- other factors are at play, such as lifestyle factors, which deliberately keep the business small or low-key;
- the business is seen as a back-up to the main business of farming; or
- there is a lack of suitable labour available locally.

Section 6.2 further explores lifestyle factors and considerations raised by producers, which may assist in explaining the five hectare maximum scale preference.

Could wildflower industry businesses stand alone (that is, without other income sources), given the scale at which the study participants were predominantly operating? A question which arises is whether a wildflower business could sustain mortgage or business investment repayments without additional income from other sources. Qualitative interview responses identifying insufficient financial returns as a limiting factor in their ability to expand operations may also shed light on this query.

Important in this discussion is the behavioural concept of a 'cottage industry mentality'. In the preliminary discussions with industry support officers prior to undertaking the producer research, most officers suggested (and expressed frustration) that the southern wildflower industry was restricted by what they termed a 'cottage industry mentality'. This was seen as a limiting factor in industry expansion and as a hindrance to their ability, as extension officers and researchers, to encourage the uptake of suitable varieties and quantities which would increase the proportion of the market available to Western Australian producers. Similarly, many producers, particularly those identifying as professional, also raised concerns about the impacts of this phenomenon.

Figures 5.10 and 5.11 shed some light on the suggestion that a cottage industry mentality exists. The research interviews revealed that smaller-scale producers were more satisfied with low incomes than were the larger producers. This dichotomy suggests the existence of two different populations with different characteristics and aspirations within the set of wildflower producers participating in the research. The analysis of their responses to the behavioural questions is relevant here. This is discussed below, and further analysed in relation to multifunctional transition theory in Chapter Seven.

The suggested existence of distinct groupings within the southern wildflower industry aligns with Holmes (2006) 'modes of rural occupance' categorisations in the transition towards multifunctionality, as depicted in Figure 2.1. Production, consumption and protection values all emerged at various levels from the research questionnaires and interviews with producers. However, three clear modes of occupance, as described by Holmes, emerged:

- **Rural Amenity Mode** (with consumption values dominant). Those producers who could be classified as being within the 'rural amenity' mode tended to be small-scale producers, who most closely exhibited signs of the 'cottage industry mentality' suggested earlier. Key motivational factors for this group (see Figure 5.13) included factors such as 'beautification' (of the local landscape), 'attractive products', 'enjoyment', 'no stress' or 'lifestyle reasons in general', and they were often undecided or disagreed when asked if they would like more income from wildflowers.

Both pickers and growers displayed elements of 'rural amenity' placement within the industry. Study participants falling within the 'rural amenity' classification were more likely to be retirees or those with professional incomes from other activities, who sought to supplement their income with production activity from their properties. 'Acquisition of land' was a motivator for a large proportion of producers in this category, some of whom indicated that they had purchased land (for consumption reasons) and then only considered what to do with it. Time availability was a further motivator. The term 'hobby farmers' was used by others in the industry to describe those producers whose characteristics fall within the 'rural amenity' classification. A small 'sea change/tree change' element was also noted. However, this was very minor. Where 'sea change/tree change' characteristics were

observed, these tended to be in relation to producers who may not have physically relocated far from their previous locality, but who were keen to “get their hands dirty as a producer” after being involved in other, non-agricultural careers.

Section 6.2 further explores lifestyle and consumption factors in the motivation of participants in the wildflower industry.

- **Pluriactive Mode** (with both consumption and production values). Producers falling within the ‘pluriactive’ mode exhibited a stronger production focus than those in the ‘rural amenity’ mode, and tended to be more business oriented but perhaps without the financial capacity or willingness to take large risks. Producers in this group included farmers who had diversified to increase income opportunities, but not necessarily at a scale which could offer significant returns. There was a tendency within this group to manage risk by not investing too deeply in case the returns were not realised. However, they did have an interest in increasing income. Some members of the pluriactive group also showed interest in the opportunities posed by tourism, including the potential for farm visits and tourist accommodation on their properties. Consumption values exhibited by this group were similar to those of the rural amenity mode producers as described above, although there was stronger recognition of production input needs (for example, water requirements, agronomic information) and market requirements.

Furthermore, the growers falling within this category often had land and water resources already available (through existing farming operations). For pickers, those within this category were most likely to identify as ‘professionals’ and, while indicating that they enjoyed the lifestyle which picking enabled, and the forest work environment, they were still very conscious of the income generated by wildflower picking. Many of the producers within this category indicated that they were in the 50-54 age cohort, and were existing farmers.

- **Productivist Agricultural Mode** (with production values dominant). Given that only five of 18 growers indicated that the area they cultivated exceeded five hectares, and that only two growers indicated annual income over \$50,000, it is believed that the advice from a large producer (who declined to

participate) that “professionals [growers] won’t respond to this survey” may be correct. At least four large producers contributing significantly to the volume and value of wildflower exports in Western Australia from the South West and Great Southern areas declined the opportunity to participate in this study. However, consideration of the available data and advice provided by support officers working with the wildflower industry leads to a conclusion that a small number of study participants, and a further (unknown) number of non-participating growers, would clearly fall within this “productive agricultural mode”.

Those growers who did fit within this category were more inclined to nominate issues related to labour supply and training, and agronomic issues such as the lack of suitable chemical labelling which would permit the use of agricultural chemicals on wildflower crops, as factors limiting the expansion, their ability to meet quality assurance requirements, and the associated profitability of their businesses. Furthermore, these growers were the least inclined to respond positively to questions regarding tourism opportunities for their own businesses, but nonetheless saw potential economic value in others undertaking wildflower tourism, as an overall strategy which might increase the economic returns and viability of their own businesses. This issue of wildflower producers being fundamentally grounded in productivism is considered in greater depth in Chapter Seven. Tourism issues are discussed further in Section 6.3 and Chapter Eight.

Regardless of the mode of production, some protection (of natural resources and biodiversity) values were also evident. An appreciation of forests and an interest in revegetation and biodiversity were identified as motivating factors in the decision of some growers and pickers to enter the wildflower industry (Figure 5.13). Wildflower pickers regularly noted what they classed as the environmental sustainability of wildflower picking within the context of forest management, while most growers also indicated the potential ecological benefits of producing native plants with agronomic requirements that were more aligned to Australian conditions than were those of introduced crops. Thus, ecological protection values were recognised broadly across the industry, but a separate protection-based mode of rural occupance under Holmes’ (2006) postulation could not easily be differentiated from the three modes highlighted above.

What this classification of rural occupance modes suggests is that wildflower production in southern Western Australia reflects multifunctionality at an industry level, and that, within individual businesses, there are elements of pluriactivity and multifunctionality. This aligns with Argent's (2002) discourse on the simultaneous existence of multiple rurals, and his questioning of the concept of post-productivism and its applicability within Australia, and also with Wilson's (2001) discussion on the multifunctional agricultural regime. The multiple modes of activity within the wildflower industry are further discussed in Chapter Seven within the context of the multifunctional rural transition framework, specifically considering the in-depth discussion that Wilson (2007) provides on the subject of the situatedness of producers on the multifunctionality spectrum.

It is evident from this brief analysis that purely productivist agriculture exists within the wildflower industry, alongside production activity which may be driven in part by consumption values. These lifestyle and consumption values are discussed in more detail in Section 6.2.

6.1.3 NETWORKS AND THE LOCAL INDUSTRY

The political economy of the wildflower industry is considered in Table 6.1. The table summarises the actors identified by industry participants (and others external to the industry) who are seen as having influence over production and activity at a farm scale, and as touching some specific relationships existing in the industry which affect individual producer decision-making.

To extend this analysis, actor-network theory provides the opportunity to interrogate industry development outcomes by considering the interactions occurring at the local (horizontal) level, by exploring the nature of the relationships present and the impacts of these relationships on the industry. This analysis will also assist in shedding light on the modes of production identified previously, and will inform the multifunctionality discussion in Chapter Seven. Those elements of the network diagram immediately impacting upon the local production decisions of a wildflower producer are considered in this actor-network analysis. Global or national-scale influences are listed in Table 6.1. This section is designed to complement the previous discussion by taking into account the small-scale relationships and the implications of these relationships on the local wildflower production system. Chapter Seven adds to this section by discussing the importance of individual

perceptions and aspirations upon agency within this agricultural industry's decision-making, which in turn affects the situatedness of the producers on the multifunctionality spectrum.

Figure 5.20 (the network diagram) identifies clusters of actors and entities within the wildflower production system which influence the activity of producers:

- Actors/entities related predominantly to the production function: this grouping includes many of the production-related entities described briefly in Table 6.1 in relation to the political economy of the wildflower industry. Production function actors (both human and non-human) include:
 - The market – local or global
 - Wildflower exporter / wholesaler
 - Wildflowers
 - Product transporters – local or global
 - Industry body
 - Wildflower agronomy issues
 - Other agricultural activity (on property)
 - Bank(s)
 - Labour force / supply
 - Plant breeders' rights (and other legal requirements)

- Actors/entities related predominantly to the protection and consumption functions (or rural areas) or a mix of functions. Some of these entities, such as government regulatory bodies, are described in Table 6.1. Figure 5.20 includes the following actors within this classification:
 - Government regulator / licensor
 - Forest

- Other growers
 - Quarantine
 - Wildflower picker
 - Education and training institution
 - Other income source(s) – for example, off-farm income; pension
 - Rural extension / development agents
 - Knowledge
 - Biophysical resources – land, water
 - Climate
 - Farm
 - Tourism
- Actors/entities predominantly related to personal or emotional goals. These include, as depicted in Figure 5.20, the following:
 - Family
 - Emotions
 - Lifestyle
 - Health

Central to the network diagram (Figure 5.20) is the wildflower producer (or their equivalent horizontal competitor, the wildflower picker). Table 6.2 considers the entities listed above in relation to the nature of the connections that they have with the wildflower producer.

Change to any one of these actors and/or their relationships influences the system by impacting upon the decision-making processes of the main actor (the producer) and by affecting personal, and potentially industry or regional change if the impact is significant enough. This suggests that local-scale relationship changes can have

substantial implications for the industry. Understanding the depths of the relationships occurring is thus vital to understanding the importance of the actor-network in a production system.

The inclusion of non-human factors in this assessment relates to how both human and non-human factors influence the actions of growers and pickers and thus their changing involvement in the industry.

The information and discussion presented in Table 6.2 takes into account the data presented in Figures 5.12, 5.13, 5.19 and 5.20 in Chapter Five. The table draws on those industry issues raised by producers in relation to how such issues affect behaviour and agency in the southern wildflower industry.

The most important element of the information presented in Table 6.2 is the relationship type reflected in the second column 'Nature of relationship with wildflower producer'. 'Production'-based relationships between the entities listed in Column One and the wildflower producers relate to those relationships which are predominantly associated with productivity and output. 'Consumption'-based relationships identified in the second column refer to those driven by the consumption of rurality, or of parts of rural systems, by producers, including tangible lifestyle factors. 'Protection'-based relationships are those based on responsibilities or interests in the protection of either the wildflower industry, rural or natural systems (for example, through biosecurity or quarantine regulation). The fourth category used to differentiate relationship-types in the network analysis is 'personal'. This category has been included to address those relationships within the actor-network analysis which cannot clearly be classified as production, consumption or protection-driven, and which are significantly affected by non-quantifiable variables such as family values or time availability.

These categorisations assist in the classification of elements of the wildflower industry within the 'modes of rural occupance' described earlier (Holmes 2006), and contribute to the discussion provided in Chapter Seven relating to the situatedness of the industry within the multifunctional rural transition discourse. The use of actor-network analysis assists in the development of the discussion by providing a basis upon which to identify and consider the micro-level interactions which impact upon industry outcomes.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
The market – local	Production-based. Some elements of personal pride where the producer feels a linkage to the local market through satisfaction with product.	Where producers have some direct interaction with the local market, and can see the consumption of their product, this relationship can be strong and provide a sense of producer satisfaction (identified as a driver for a small number of growers and pickers – see Figure 5.13). Very few producers showed interest in local markets.	Relatively small. Increasing the intensity of this relationship between some producers and the local market may result in small crop increases, but unlikely to have significant impact on the whole system.	Minor. Direct producer relationships with the market at a local level are neither substantial nor particularly influential at a broad scale, given the export-oriented nature of the industry.
The market - global	Production-based.	In most circumstances, the relationship between the producer and the global market-place is very distance-affected. (The global/export market is considered in Table 6.1).	While individual producers surveyed had little direct relationship with the global cut flower market (all utilised third-party wholesalers and exporters for marketing and distribution), changes in the global market clearly impact upon the production requirements of producers. Changes in the <i>relationship</i> between producers and the global market would have minimal impact upon the production system.	Changes in the <i>relationships</i> between producers and the global market, given the use of third parties in the commodity chain, are likely to have minimal impacts on the industry unless producers expanded production output and increased professionalism, and opted to export and market directly. No producers gave any intention of a desire to do this.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Wildflower exporter / wholesaler	<p>Production – based; although personal affiliations were strong in many cases.</p> <p>Wholesalers (poor) attitudes to growers and lack of feedback were identified by one quarter of growers participating in this study.</p>	<p>In the bulk of scenarios in the research, this relationship was exceptionally strong, with producers accessing wholesaler and exporter advice in relation to multiple factors, including species varieties to plant, agronomic information, market expectations, cool chain transport, presentation of product, and other functional issues. Refer also to the parent-child relationship discussed earlier. This situation related specifically to two wholesalers who were frequently cited by both growers and pickers as their preferred industry operators.</p>	<p>For many of the small-scale participants in this research, the relationship with the wholesaler or exporter was perhaps the most important in the production system, for reasons of access to advice and the parent-child relationship discussed earlier, as well as for the sale and distribution of product at a local level, either to local or export markets.</p>	<p>Many smaller-scale study participants exhibited dependency on their preferred wholesaler, and would need to find alternative sources of advice and information should the relationship sour or cease to exist. At a local production level, the implications of this could be significant. At a national industry level, this may not be a major issue given the scale at which most of the study participants engage.</p> <p>With regard to the identified need for more wholesaler feedback on product quality and market need, the implications for industry development could be significant if feedback loops were improved.</p>

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Wildflowers	Production or consumption based. May be personal consumption driven (in relation to personal appreciation of wildflowers as a motivational factor in industry participation) or driven solely by relationship with wildflowers being a commodity.	Twenty of 28 growers and 14 of 39 pickers participating in the research identified an interest in wildflowers (growers) and forests (pickers) as motivating factors for entering the wildflower industry. Other similar lifestyle factors, as presented in Figure 5.13 and discussed in Section 6.2, added further weight to the argument that the personal relationship between producers and wildflowers is significant in affecting the industry.	This relationship is significant as a driving factor in the establishment of wildflower production businesses. At the scale at which most of the study participants operate, this factor is as important as any commercial or business decisions to enter the industry.	No participants indicated that a thorough business analysis of potential diversification opportunities resulted in a commercial decision to enter the wildflower industry. While the personal preference for wildflowers may be an important driver at the scale at which participants in this study operate, this personal preference is not considered essential for industry development. Larger –scale growers choosing not to participate in this study may or may not be driven by a personal liking for wildflowers, but by commercial decision-making processes, which may have a greater impact on industry development.
Product transporters – local or global	Production-based.	Very few wildflower producers indicated strong relationships with the product transporters at a local level, yet the majority was very concerned about the importance of cool-chain transport in maintaining product quality.	While the <i>relationship</i> between producers and transporters does not necessarily impact upon the supply chain and industry development, the maintenance of product quality through the transport system does.	Improved relationships may result in better understandings between transporters and producers regarding the impact of transport times, temperatures and conditions on product quality.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Industry body	Production and marketing related. Wildflower producers exist as members, alongside other cut flower growers (native and non-native), exporters, florists, government agency representatives and others within the membership of industry bodies and producer groups.	Six wildflower growers and no pickers were members of Flowerswest, the floriculture industry development and marketing organisation in Western Australia. Many indicated a poor, if any, relationship with Flowerswest, due in part to a feeling of irrelevance or lack of value for money, but mostly due to a perception that involvement with the industry group would take up too much time and provide limited benefit. Three other growers found benefit from involvement with specific grower groups (established by the Department of Agriculture). Growers indicating membership of specific species/product groups suggested strong relationships with other producers of the same species, due to similar issues and information requirements. Flowerswest members had varying relationships with the organisation, ranging from committee membership and active involvement to general membership with remote or limited involvement.	Strong relationships with grower groups and industry organisations have the potential to greatly benefit producers, subject to willingness to participate, access to information through such groups, and the level of trust between members.	<p>Producers not involved with grower groups or industry bodies raised the issue of “what’s in it for me?” as a key influencing question in their choice not to participate in such groups.</p> <p>In a scenario where producers (who are in fact competitors) were willing to trust each other through the exchange of information and ideas through an industry body or producer group, this relationship between an individual and the group could be very beneficial in both developing the industry and providing advice and support to assist the producer in their business decisions.</p>

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Wildflower agronomy issues (such as chemical requirements and regimes; fertiliser needs; irrigation scheduling, etc).	Production-related. Most producers indicated wildflower agronomy, and their understanding of it, as a significant factor in their production successes (or failures). Wildflower agronomy thus becomes an important non-human actor which is essential to the producer.	The depth of the “relationship” between producers and the agronomy information they need for efficient production varied, yet most producers acknowledged the need for improvement in their understanding of agronomy issues and thus the relationship with this information (and by default, the sources of this information).	Significant for the wildflower production system; potentially significant for wildflower marketing if agronomic advice contributed to improved quality assurance and environmental credentials which could then be marketed appropriately.	Improved knowledge and understanding of wildflower agronomy on the part of producers would significantly enhance their ability to positively affect the industry.
Other agricultural activity (on property)	Production-based. The majority of growers (see Figure 5.12) reported income sources in addition to wildflower production (pluriactivity). For existing farmers, this was predominantly in relation to other <i>farm</i> income.	Producers with other agricultural activity tended to utilise the knowledge gained from that activity to benefit their wildflower production. The relationship between other farm activity and wildflower production was strong and significant for these producers.	Utilising the knowledge gained from other farm experiences, and the resources available (for example, cultivation and irrigation equipment) were major benefits arising from the complementary arrangements applied by pluriactive producers.	Where other agricultural production experiences were noted, the implications for the wildflower industry were generally positive due to the existing knowledge of the producer. Producers indicated the application of learnings from other agricultural activities to their wildflower production had positive implications. The extension of this recognition suggests positive industry implications where existing agricultural experiences are utilised.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Bank(s)	Production / income-related.	Variable according to the degree of debt. The majority of growers (63%) indicated their properties had freehold tenure, without mortgage encumbrances. The implication of this is that most producers would not be directly impacted by bank costs, interest rates changes, etc., in relation to their wildflower production activity, and thus the potential influence from financial institutions upon business activity is generally low.	As with all businesses, debt levels affect the overall economic viability, and potentially the influence of lending institutions over producer behaviour and decision-making. The bank-producer relationship could significantly influence the local production system where debt levels are large. However, in relation to the wildflower industry, most producers were relatively debt-free with regards to property and capital investment.	Increased debt (and thus a strengthening of the dependency and/or accountability of producers to financial institutions) may result in more expectation and demand from banks to increase profitability by whatever means possible – whether that be through reducing costs or increasing production and turnover. Similarly, a desire to increase market share and professionalism may result in producers seeking a stronger relationship with their bank (more debt) for capital investment, with the implications for industry production levels potentially being significant.
Labour force / supply	Production related. Very few producers indicated the employment of labour. However, where this was the case, issues such as labour supply and appropriate training were raised.	Variable according to individual producers' levels of production and associated labour requirements.	Where producers indicated staff employment, the relationships with staff were fundamental to the success of their production, harvesting and packaging systems at a local level.	Increased employment of labour across the wildflower industry could drive training agendas (at institutional levels) and potentially have significant positive outcomes for industry. (Staff training opportunities was raised as an issue by two growers, both operating at professional levels (See Figure 5.19)).

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Plant breeders' rights (and royalty payment obligations)	Production-related. Many growers surveyed were not satisfied with the perceived high cost of royalties to plant breeders (particularly where Department of Agriculture research had occurred on private properties). Varieties currently being researched were widely deemed not appropriate for southern region conditions.	Previous disagreements and discontent regarding formal plant breeding research programs in Western Australia frequently emerged. Relationships between southern producers and wildflower researchers did not appear positive.	A small number of producers declared an unwillingness to participate in future research programs due to previous misunderstandings and miscommunication over wildflower research trials (and intellectual property rights) on grower properties.	Study participants indicated significant room for improvement in the relationships with plant variety research organisations and individual researchers. Positive outcomes for the industry from improved relations could include the production of more localised species in a commercial setting, thereby increasing industry development opportunities and commercial viability of the industry in southern Western Australia.
Government regulator / licensor (Specific government roles described in Table 6.1)	Protection-based. All producers cultivating or harvesting species endemic to Western Australia are required to lodge quarterly returns to CALM/DEC, which are compared to returns lodged by wholesalers for verification.	All pickers and some growers have regular contact with government on this basis. The majority of producers – growers and pickers – expressed dissatisfaction and a lack of trust of government. Further indication of poor relationships came from multiple concerns raised about government's watchdog role.	The impacts of generally poor relationships with government agencies in their regulatory roles were evident in advice from industry support officers (and some producers) that producers were not always honest in their returns. Implications, especially for the picking industry, include reduced access to, or more competition for, State Forest blocks.	Honest returns may ensure future government policy affecting the wildflower industry is grounded and appropriate. Increased producer trust of government may result in more honest returns. Additional discussion on the significance of this relationship is provided in Section 8.3.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Forests	Production/Consumption. Most pickers indicated the hard work associated with picking was negated by the satisfaction received from working with nature in a forest setting.	Pickers expressed strong personal (consumption) relationships with forests, evident through their indications of motivating factors for their involvement in the industry.	With the bulk of Western Australia's wildflower volumes arising from forest-sourced flowers and foliage, the personal relationships between pickers and forests have significant impacts on the number of pickers and the volumes picked.	With forest-related lifestyle factors driving picker involvement in the industry, changes to this relationship might result in a decline in the volumes picked and a reduced presence of Australian-sourced flora on international cut flower markets.
Other growers	Production – related relationships; largely competitive. The relationships with other growers varied according to individual producers. As noted earlier, many newer entrants to the industry advised that longer term wildflower producers (competitors) were rarely forthcoming in sharing information (that is, their competitive advantage).	Most producers indicated, to varying degrees, working relationships with others at least at the local level. This was particularly so for wildflower pickers, who worked in a complementary fashion, as per their licenses, to ensure forest blocks “picked” were harvested in a sustainable manner.	Co-operation in agriculture can assist in achieving multiple benefits to producers and the market, including improved product quality (as a result of information-sharing) and increased volume gained by economies of scale if strong co-operative arrangements can be achieved. This was rarely the case in the wildflower industry, although local wholesalers assisted in achieving these goals through facilitating information sharing (if not direct, then via themselves as third parties) and by combining product for increased market volumes.	Co-operative arrangements could potentially have positive outcomes for industry development via information-sharing, quality improvements, economies of scale in production systems, and product volumes in the market-place. Improved trust and relationships between local competitors could thus have positive outcomes if these goals were to be achieved.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Quarantine	<p>Production/protection functions.</p> <p>All exported products must comply with quarantine and other export obligations such as the use of permissible chemicals.</p>	<p>Larger-scale producers consulted during this research indicated sound understanding of quarantine requirements and obligations.</p> <p>Smaller producers expressed less awareness of quarantine-related issues.</p>	<p>Sound understanding of quarantine obligations at local, national and international levels will assist in the marketing and sales of product which meets market and biosecurity requirements.</p>	<p>Reduced interest in, or knowledge of, quarantine and biosecurity issues will have negative consequences for industry. The opposite also applies.</p>
Wildflower pickers	<p>Production-based competitive relationships.</p>	<p>Most growers and pickers expressed limited understanding of the alternate producers' perspective, and showed little relationship with or knowledge of the needs of the other set of producers. Growers regularly suggested pickers' product was of lesser quality, was a threat to the cultivation industry, and gave pickers a significant competitive advantage due to the small capital requirement for pickers. Pickers felt growers did not appreciate that the bulk volume of Western Australian (WA) wildflowers in international markets was from bushpicked sources, giving market space to WA product.</p>	<p>Differences of opinion on the part of growers and pickers does not contribute to a united front for Western Australian wildflower producers.</p>	<p>Improved mutual understanding of the importance of both sectors and improvements in co-operation could have significant benefits for the marketing and volumes of Western Australian wildflower product available on the international market.</p>

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Education and training institutions	Production-based outcomes	Minimal. At the time of the research there was minimal flower industry-specific formal training available in Western Australia. Education regarding wildflower cultivation and agronomy, and the training of labour sources in relation to these factors and post-harvest handling, were identified by more professional growers as necessary for industry development, but not yet in place.	Potential for significantly improved quality in production systems.	Improved relationships with training institutions could result in producer and staff training, with improved product quality outcomes, and potentially higher returns to producers.
Other income source(s) – for example, off-farm income; pension	Personal (economic) survival strategies	As indicated in Figure 5.12, the majority of growers indicated they had other income sources. For most, income generated from wildflowers was supplementary to other sources.	Many producers indicating other income were dependent upon that other income to fund their participation in the lifestyle-driven activity in the wildflower industry.	Without other income, many producers would not be able to afford to participate in the wildflower industry at the scale at which they were operating. Increased wildflower income may result in less dependence on other income sources.
Rural extension / development agents	Production-related relationships. Local extension agents were regularly suggested as positive influences by many growers.	The depth of relationships with extension agents varied. However, some local officers, particularly in the Great Southern area, were highly regarded and strong personal and professional relationships existed for many growers.	Significant impacts where extension agents and producers developed rapport and trust. Impacts included trialing of new or alternate species or production and harvesting techniques.	At the time of the research, the Department of Agriculture was withdrawing extension services to wildflower producers. This was seen as a backward step by many producers unable to access independent advice from other means.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Knowledge	Underpins the Production / Consumption / Protection values	The depth of producer knowledge varied significantly.	Producer possession of, and access to, wildflower production knowledge and knowledge networks, has the potential to greatly assist production and marketing opportunities for wildflower products.	Increased industry-specific and marketing knowledge is essential for industry development.
Biophysical resources – land, water	Based on Production / Consumption / Protection values	With the majority of producers indicating (positively) that environmental factors were motivational in their decisions to enter the wildflower industry, and with access to land and water resources (farmers) and local forest blocks (pickers), the relationships between producers and their biophysical resources are generally strong.	Access to biophysical resources is fundamental to the production of wildflowers, in both cultivated and bushpicked scenarios. A sound relationship between the producer and the biophysical resources with which the producer works is fundamental to the production system.	Reduction in access to, or knowledge of, biophysical resources and processes will negatively affect the ability of producers to engage in the wildflower industry.
Climate	Production / Consumption values impacted	As with biophysical resources, climate factors have a motivational role in affecting producer behaviour, as well as physical impacts on production. Mediterranean climate benefits to individual producers are largely encapsulated in the lifestyle motivational factors discussed in Section 6.2.	Practical impacts include the adequate growth and quality of crops (or bushpicked product) in relation to water availability, solar and wind damage.	Loss of wildflower crops due to water shortages, wind or solar damage was noted by a number of producers. Such impacts of climate can significantly affect industry production in terms of quality and quantity of produce.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Farm	Production / Consumption	Many producers have emotional ties to farms or the land they are on, particularly in the case of family farms where intergenerational transfer may have occurred. This is in addition to the physical relationship with the farm resources (see “Biophysical resources” discussion earlier in this table).	Some producers may choose to enter the industry as a survival means to ensure they can remain farming, others may see wildflower production as complementary to existing farming activities (see Figure 5.13). Access to land, and the capital resources provided by existing or complementary on-farm practices and industries, may assist in wildflower production.	Spatial linkages between producers and their land are often complex and can be emotional. Changes in the relationships between producers and land – for example, the loss of land, or the degradation of the land resources – may have emotional as well as physical implications for the ability of producers to continue production.
Tourism	Consumption-driven	Relationships with tourism are variable, dependent upon individual producers and their responses to demand for consumption of the rural environment. See Section 6.3 for further discussion.	May have positive outcomes for wildflower marketing, in terms of the sale of rural amenity with specific regard to wildflowers.	Variable. See Section 6.3 for in depth analysis.

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Family	Personal ¹ Producers indicated, in many circumstances, the role of family situations (as a sub-set of lifestyle factors) influencing the decision to enter and remain in the wildflower industry.	Depths of producer-family relationships vary.	Family relationships have the ability to greatly affect the contribution a producer is able to make to the wildflower industry.	Changes in family dynamics and situations can affect the industry in multiple ways. (Lifestyle issues, including family issues, are discussed in Section 6.2).
Emotions and personal health	Personal factors	Producer health and emotional stability varies.	Health and emotional stability can impact on production, particularly in a physically demanding industry such as wildflower cultivation or picking. A clear example of the impact of emotional turmoil on production within the wildflower industry was from a (former) grower whose partner had recently died and who had ceased wildflower production).	Such factors are difficult to quantify and predict, but need to be recognised for their ability to impact upon local wildflower production, particularly within the set of producers classified as small-scale.

¹ *Personal values are seen to be important drivers in any decision-making process, as discussed in Section 6.2. The implications of personal values on the situatedness of producers in relation to agricultural multifunctionality are discussed in Chapter Seven.*

Table 6.2 Actor-Network Analysis Summary – Relationships between producers and actors in their production networks (continued)

ENTITY / ACTOR (Human and Non-human)	NATURE OF RELATIONSHIP WITH WILDFLOWER PRODUCER	DEPTH OF RELATIONSHIP WITH WILDFLOWER PRODUCER	IMPACT OF THE RELATIONSHIP ON THE WILDFLOWER PRODUCTION AND MARKETING SYSTEM	IMPLICATIONS OF CHANGES IN THE RELATIONSHIP FOR THE WILDFLOWER INDUSTRY
Lifestyle	Personal	The depth of lifestyle factors in motivating producers varies. Refer to Section 6.2 for in depth analysis of lifestyle issues in relation to the wildflower industry.	Lifestyle factors contribute significantly to the motivations for entering, and the rationale for remaining in, the wildflower industry for many producers.	Discussed further in Section 6.2 and Chapter Seven.

Which of the relationships considered in Table 6.2 are the most important or have the most potential influence upon wildflower industry development? Producers generally identified their relationships with wholesalers and exporters as either very strong, or should be stronger, acknowledging the importance of these actors in the production system. Pickers, in particular, took advice from wholesalers. The importance of other relationships depicted in Table 6.2 varies according to the mode of production in which the producers operate. However, the exporter/wholesaler group stands out as being a significant association.

The implication for regional or agricultural development is that agencies and support organisations need to influence the influencers. This observation should not be new for people working in agricultural extension or any sort of development work. At the scale at which most producer participants in this study operate, the majority of growers or pickers could be considered to be too remote from most of the entities in the political economy described in Table 6.1 for those entities to influence individuals' production decisions directly. Local wholesalers and exporters thus become very important as the links between the producers and the political economy in which they operate.

Worthy of further discussion is the question of how the network is formed. This assists in identifying network strengths and thus weaknesses and thereby the potential risks where multiple core actors (wildflower producers) exhibit similar network attributes. In the case of the wildflower industry in southern Western Australia, most participants noted that their local production networks had evolved through personal efforts to engage with others in the processes of learning about their industry.

The use of industry groups such as Flowerswest and specific wildflower product groups supported by the Department of Agriculture was an information-sharing and gathering method used by some producers. Those involved with industry groups at the time of the research indicated benefits to their wildflower business from this participation, although the majority (eight of ten) of those who indicated industry group membership were self-identified 'newcomers' to the industry. More established growers who had previously been involved in such groups generally no longer saw value for money from being group members, indicating that the ability of industry groups to offer "new" information to satisfy producer needs may decline as

producers become more experienced. This links to the concerns raised by new growers that it was difficult to access the advice of more experienced producers. As a result, the newcomers opted to source information from whichever sources might best fill their knowledge voids. Once producer knowledge levels increased (using the advice of grower groups, and other sources such as the Department of Agriculture), the relative value obtained by producers from participating in such groups declined. This was expressed through the indication by more experienced growers (see Section 5.2.2.5), that they were no longer involved in producer groups because the value obtained from their involvement could no longer be personally (or perhaps financially) justified.

What this thesis does not do is analyse the cross-relationships within the network depicted in Figure 5.20 and described in relation to producers in Table 6.2. The cross-relationships between human and non-human actors other than the central producer, provide a guide to the knowledge flows and linked responsibilities between actors within the wildflower production system.

Are local influences more powerful than the remote ones? On the basis of the research undertaken with wildflower producers, and the advice that they have provided on their sources of industry information, it is argued that local, endogenous factors (at agency level) are at least on par with remote (national / global) influences (at a structural level). This is further discussed in Chapter Seven, where a multifunctionality analytical framework is used to show that while exogenous factors and underlying productivist tendencies affect producer behaviour, local level tangible and intangible factors have a strong role to play in both the situatedness of the producer, and in any tendencies that they might exhibit to engage in other rural activity. Table 6.2 has endeavoured to describe the producer relationships, and the strength of those relationships, in the wildflower production system. Impacts from changes to the relationships, as presented in the final column of Table 6.2, indicate that significant industry development outcomes are possible, from relationship changes between actors even at the local level.

The summary provided in Table 6.2, and in particular the consumption / protection / production / personal values assessments contained within the column "Nature of Relationship with Wildflower Producer", inform the discussion contained in Chapter Seven in relation to the situatedness of the wildflower industry in the multifunctional rural transition framework.

6.2 MOTIVATIONS AND LIFESTYLE ISSUES

This section focuses on the personal motivations and influences on participants in the wildflower industry. Many of these issues have been touched upon on the previous discussion in regard to the relationships of producers to other entities. They are considered again here with specific reference to the producers themselves in order to assist in gaining an understanding of the producers' positions within the industry. This section considers the extent to which lifestyle choices and preferences have affected producers' decisions to enter the wildflower industry, and discusses whether the data are sufficient to suggest that a 'sea change' may have occurred as a result of their decision-making.

As depicted in Figure 5.14, of the reasons given by producers for entering the wildflower industry, 50% could be considered lifestyle-related, while 47% of the reasons related to economic or production (for income) factors.

The conclusion to be drawn from these data is that while lifestyle reasons were important in industry *entry* decisions, income generation, and in particular, supplementing other sources of income (such as from other farming activities or to financially support semi-retirement), are equally important in motivating producers. As will be explained in Chapter Seven, in addition to lifestyle factors influencing industry entry, these factors are evident throughout many elements of producer decision-making once the wildflower business has been established. Furthermore, they may influence the depth to which many producers choose to participate in the industry over time.

6.2.1 SEA CHANGE?

Is there evidence of a 'sea change' (or 'tree change') or of counterurbanisation occurring in the southern wildflower industry? Based on the responses provided by producers, the answer to this question is largely no. Nearly two-thirds of growers nominated a nearby (within the same region) postcode when responding to the question about their previous location, and those who did indicate time spent at their previous address averaged nine years at that location. Predominantly, those involved in the industry had not shifted far, if at all, in recent years, and this had not affected their decision to produce wildflowers.

Some suggestion of elements of a 'sea change' may be drawn from the small number (five) of growers and one picker whose previous occupations were categorised as 'professional'. However, there was little evidence of a significant physical shift to a new locality *to produce wildflowers*. Moreover, the shift to producing wildflowers was often a response to the availability of land in a near-to-urban area within the study area – that is, a property purchased (for lifestyle reasons) near to the main source of employment, such as Albany in the Great Southern region. A desire to generate additional income, accompanied by a personal interest in wildflowers, biodiversity, native plants or similar issues, may then combine to contribute to a decision to enter the industry. Elements of 'hobby farming', where there was less imperative to make a profit, were also identified here. The small proportion of producers who may have 'sea change' characteristics predominantly fell within the 'rural amenity mode' identified by Holmes (2006) which was suggested earlier in this thesis as being evident in the southern wildflower industry.

Furthermore, while a 'sea change' phenomenon cannot clearly be identified across the entire southern wildflower industry, an initial vision of a relatively easy and stress-free lifestyle with the primary use of one's time spent picking flowers was noted by numerous growers, across multiple modes of production, in the interviews. When asked how their current lifestyle compared to that of previous occupations, slightly more than a third offered negative or undecided responses, including "what lifestyle?", more hectic, harder, financially challenging, "different", or simply "okay". The physically demanding nature of wildflower production was identified by many as something not quite expected, particularly by those in older age brackets.

However, an almost equivalent number of growers felt that the lifestyle offered was better than initially anticipated. Pickers, in particular, enjoyed wildflower production (picking) and the lifestyle it offers. Given that the majority of pickers were current or former unskilled or semi-skilled labourers (with timber mill labouring and general farming the most common previous roles), their reasons for enjoying participation in this industry often related to being self-employed and setting their own work targets. Independence in employment was clearly a factor for many pickers, whose employment options outside of this industry, as unskilled or semi-skilled labour, would be limited. Personal pride in their contribution to the industry was also evident from many pickers, and was reflected in the high number (80%) of pickers

who identified as being 'professional'. Job satisfaction was thus very important, and may not have been evident in their previous labouring roles for many pickers.

6.2.2 NON-TANGIBLE INDICATORS – LIFESTYLE AND TIME

The discussion above has indicated that while income generation is fundamental to the participation of the majority of growers and pickers across the wildflower industry some less-tangible considerations were noted during the research and may have implications for industry development.

For many industry participants, particularly those in older age brackets, and for those who identified lifestyle variables among their reasons for entering the wildflower industry, any shift towards increased production may have negative externalities which impact upon lifestyle. For a small numbers of growers and pickers, as depicted in Figure 5.11, an interest in earning increased income from wildflowers was therefore not clearly evident. This largely related to the perception that increased income requires increased work. For most producers, however, (that is, those generally falling within Holmes' (2006) 'pluriactive mode'), increased work for increased income was not necessarily a negative outcome, given that income diversification was fundamental to their involvement in the industry.

The critical nature of "time availability" became evident from discussions with producers and from the review of survey questionnaire responses. The divide between those producers who could be classified as 'pluriactive' and potentially "productivist", and those who fell within the 'rural amenity' mode as discussed earlier, largely relates to time management, and to a willingness and ability to deal with time availability or shortages.

For single-operator production businesses, available time to expand operations and increase income generation opportunities is limited unless producers are prepared and able to hire labour or employ staff and to obtain economies of scale. Employing labour would indicate a significant change in the nature of the business, and may reduce the importance of hobby or lifestyle dimensions within an individual's decision-making process. This issue is explored further in Chapter Seven in relation to the situatedness of producers on the multifunctionality spectrum.

The study participants falling within the 'pluriactive' and 'productivist' production modes described by Holmes (2006) were predominantly willing to expand in scale and to utilise the time of others (such as employed labour) to contribute to their own business expansion. Proximity to labour markets, as identified in the political economy summary (Table 6.1), greatly affected the ability of producers to capture the time of others to meet their own personal objectives (be they lifestyle or production-focused).

Those producers identifying a shortage of time, or the erosion of family time, as reasons not to expand production or picking, could thus be largely classified as existing within the 'rural amenity' mode of production within Holmes' classification. However, as Chapter Seven will illustrate, producers do not necessarily remain positioned at any one point on this spectrum of productivism and non-productivism, and the relative importance of any one factor, such as family time, at any given time, will affect where they sit within a given agricultural arrangement.

6.2.3 DRIVING FORCES IN THE WILDFLOWER INDUSTRY

Based on this analysis of the motivations, backgrounds and lifestyle considerations suggested by wildflower industry producers, the conclusion is drawn that for the majority of participants in this study, while lifestyle benefits were clearly factors in their decision to commence producing wildflowers, income diversification was the dominant factor. Evidence of urban to rural migration was not clearly ascertainable, and while a small number of producers ventured from professional occupations into wildflower production, often due to the availability of land, this was largely a secondary income or a semi-retirement pastime.

These factors align with the suggestion by Holmes (2006) (see Figure 2.1) that consumption forces may be significant in driving rural change, and in particular, that they may contribute to a shift towards multifunctionality in rural areas. Specifically, Holmes notes the following characteristics of a consumption-based transition within rural areas: "Enhanced access, higher incomes and lifestyle changes [contributing to] urban penetration; residential, recreation; tourism [contributing to] Amenity premium on land values; [contributing to] Farm adjustment via pluriactivity and off-farm income" (Holmes 2006: 144). The implications of the evidence of each of these factors within the wildflower industry, in relation to broader socio-economic and political conditions in the South West and Great Southern regions, are

considered further in Chapter Seven in order to identify the status of rural change in the study area and the implications of this for wildflower industry development locally. However, as Chapter Seven will argue, the status of any one producer, or a group of producers, is not fixed, and may exhibit both productivist and non-productivist tendencies, depending upon the particular lifestyle, local relationship or political economy factor being considered.

The relationship between the wildflower industry and tourism in the study area will now be considered in order to provide an assessment of the diversification opportunities to be gained from aligning tourism with wildflower production within the general trajectory of rural change occurring across the study area in recent decades. The tourism assessment provides further evidence to support the assertion that consumption and lifestyle values are significant factors driving wildflower producers, and that any further diversification must provide clear economic benefits to outweigh any perceived detriment to the lifestyle values encapsulated within the wildflower production systems described in this thesis.

Fundamentally, however, as will be argued in Chapter Seven, wildflower producers are producers first and foremost, and their backgrounds and activities indicate their primary interest as being in commodity production rather than in the servicing of consumer demand – as is required by tourism. This underlying factor has significant implications for any efforts to encourage wildflower tourism business development in the South West and Great Southern Regions.

6.3 TOURISM AND THE SOUTHERN WILDFLOWER INDUSTRY

Study participants were asked if they had considered and/or were interested in developing complementary rural industries, such as tourism.

The relationship of the wildflower industry to tourism was investigated from a number of perspectives. These included those of the growers and pickers involved in wildflower production in the South West and Great Southern regions, and those of existing tourism business operators, including tourist bureaux, and tourism industry support officers. The approach largely addressed supply issues. It looked at the potential for diversification into tourism by the set of wildflower growers participating in the industry during 2001-2003. Demand issues were considered from the viewpoint of operators, providing insights into what they saw as industry

opportunities, or otherwise, for the study area. The driver for this assessment was the request, on behalf of the South West Development Commission, a contributor to this study, to investigate the potential for increasing regional revenue and development through wildflower tourism. The success of the wine industry and related tourism in southern Western Australia provides a benchmark against which wildflower tourism opportunities could be considered.

The question of commoditisation, as discussed in Chapter Two, comes into play here. Do wildflowers on the farm add more value as a tourism object to a crop for domestic or export sales? Do producers and tourism business operators identify and/or desire this? Does this provide opportunities for local or regional economic development?

It should be emphasised that wildflower tourism opportunities in Western Australia have historically been focused within the drier Mid-west, Wheatbelt and Goldfields regions during the spring months (September – November), due to the existence of multiple naturally occurring wildflower species on roadsides and in native vegetation in these areas. These northern and eastern regions thus provide significant naturally occurring competition for the wetter South West and Great Southern regions. The naturally occurring wildflowers in the southern regions are often foliage species, as discussed in Chapter Four, which may provide less sensory pleasure or visual appeal than do flowers *per se*, and more specifically, than do the flowers of the State's more arid areas, where they make a large contribution to Western Australia's tourism industry.

Many tourism operators who operate in other parts of the State were hesitant to suggest that their tourist clientele would be particularly interested in visiting the study area for the purposes of viewing South West and Great Southern wildflowers (alone).

These points are further explored in the discussion which follows.

6.3.1 WILDFLOWER INDUSTRY PARTICIPANTS' PERSPECTIVES ON TOURISM

"Tourists bring disease." This was a clear statement made during the research program by a wildflower picker not keen to see an expansion in wildflower tourism in the study area. As mentioned in Section 5.2.7, the majority of producer responses

in relation to tourism were negative, with perceived hindrances and reasons for not wanting to be involved in tourism including:

- Concerns with quarantine or biosecurity issues if tourists visit wildflower production properties (for example, from risk of the spread of fungal diseases on shoes).
- Concerns regarding the business viability of wildflower tourism opportunities.
- Suggestions that tourism industry seasonality does not warrant the level of investment required.
- Concerns regarding increased costs associated with allowing tourists onto property – including insurance costs (for items such as public liability insurance), and local government rates charges for tourism-related activity, which were noted by some participants to be significantly higher than the rates charged for general farm production activities.
- Concerns that tourists may disrupt the personal serenity of wildflower producers.
- Suggestions that intensive wildflower production, in cropping situations, would not be particularly attractive to tourists and thus would not support a tourism business.

Lifestyle influences upon producer motivations for entering the wildflower industry may have some role to play in these responses. As discussed previously in Section 6.2, lifestyle factors and often the initial perception of a relaxed rural income-source through wildflowers have a significant role to play in understanding the actions of many wildflower industry participants (that is, those in the “rural amenity mode” classification within Holmes’ (2006) framework). Tourism development, like any business expansion, would signify an increase in workloads and responsibilities. Many producers indicated their motivations for participating in the industry as being contrary to these increased responsibilities. The mature age of many producers may also be a factor in their disinclination to enter an additional high workload industry such as tourism. It stands to reason, then, that the “rural amenity mode” producers participating in this study would generally not personally consider establishing wildflower tourism businesses (and that those producers enjoying the

serenity of rural production would not seek to encourage mostly urban-based tourists into their personal (rural) space).

Interestingly, the four producer respondents who indicated a willingness to consider tourism operations on their properties would clearly fit within the 'pluriactive mode' classification of Holmes' (2006) multifunctional rural transition model. For producers existing within the 'pluriactive mode', wildflower tourism may provide income generating opportunities for some, or may not be a preferred business choice for others. A willingness to consider possible diversification opportunities as an economic survival strategy is characteristic of producers in this mode, and may underpin an acceptance of expanding tourism as a future possibility.

Representatives of both modes of producers, however, identified tourism as having the potential to make a healthy contribution to the wildflower industry in general – but they were not necessarily interested in operating tourism businesses themselves.

6.3.2 TOURISM OPERATORS' PERSPECTIVES ON WILDFLOWER TOURISM OPPORTUNITIES IN THE SOUTH WEST AND GREAT SOUTHERN REGIONS

As noted in Figure 5.21, 40 existing tourism industry operators with an interest in wildflowers provided advice to assist in the wildflower tourism analysis undertaken in this study. Tourism support organisations such as tourist bureaux accounted for 40% of this set of respondents, while the remainder represented bus charter companies, general tour operators and interpretation guides. The average time in the tourism business, for both groups, was in excess of 19 years, indicating a wealth of knowledge which informs significant experience-based advice on industry growth and development opportunities within the study area. This experience must, however, be considered in the light of the possibility that respondents who operated tourism businesses may have been protecting their own competitive advantages within the industry. However, there was no specific evidence that this occurred.

Figure 5.23 provides a graphic illustration of the age profile targeted by tourism business operators, with the age group 51-55 years being the modal response of operators regarding the age of their client-base. Significantly, the most frequently cited clientele ages were within the 50 to 70 years age brackets, indicating a generally mature or early-retiree/retiree market. While all younger age groupings

were noted to varying degrees, there was a clear trend of increasing responses on the question of clientele age, peaking at 51-55 years then slowly declining. The implication of this for industry development relates to the wildflower experiences desired by the mature client base. The commodity value of a wildflower in-situ may be significant for tourists in older age brackets, content to view and explore beauty in harsh (often arid) landscapes, and pay for the privilege, rather than solely to purchase products.

Traditional experiences such as chartered bus tours were identified by participants as being very popular with older tourists. However, the respondents suggested that the business opportunities in Western Australia for wildflower tourism experiences from bus charters are largely located in the drier parts of the State. The biophysical differences, including visual attractiveness, in the varieties and locations of wildflowers between the wetter South West and Great Southern regions, and the drier areas – the Midwest, Gascoyne-Murchison, Goldfields and Wheatbelt regions – are significant enough to greatly affect demand for tours (Source: Bus Charter Company Director with 27 years' experience).

Generally, responses from operators regarding the specific possibilities for wildflower tourism in the South West and Great Southern regions were not positive. Given the longevity of the operators in the tourism industry in Western Australia, it can be considered that they have sound insight into the existing client trends and the potential for future development. As Figure 5.24 depicts, the majority of business operators felt that there were already sufficient opportunities for tourists in the region.

Tourism support organisations, however, varied in their opinions, and the majority clearly disagreed with the synopsis from the tourism business respondents. The support organisations are largely those that deal directly with the enquiries from tourists – the demand side of the wildflower tourism equation – and they endeavour to link tourists with tourism businesses. Their insight could be significant. (Further research directly into tourist desires with regard to wildflowers may shed additional light on actual demand within the study area. However, this was outside of the scope of this study).

Probable explanations for the difference in opinion between the majority of tourism operators and the majority of tourism support organisations may relate to the depth

of industry knowledge and to the decision-making processes required to further expand business operations based on demand. The tourism business operators were presumably profitable given their average length of time in the industry, and they would have developed, over time, the ability to make business investment decisions related to actual demand. Even if the businesses had changed ownership during the time of business operation, it can be assumed that corporate and market knowledge would have been partially captured in the exchange. As a result, it may be safe to say that if wildflower tourism opportunities existed – that is, if the demand for tours and experiences exceeded their ability to supply the market – the operators could have expanded their businesses to account for the demand.

However, this course of action was not indicated by tourism business operators at the time of the study. Instead, they noted that they were cautious of assumptions regarding increased demand and the potential for industry expansion, because they had not noticed sufficient increased demand to warrant the establishment of new, or the expansion of existing, wildflower tourism opportunities in the study region.

Tourism support organisation staff may experience demand from clients (tourists) contacting their organisations. However, this demand may not be at a level substantial enough to sustain further businesses or business expansion. Yet the response from these organisations to the enquiry regarding demand appears to indicate a belief that there are insufficient wildflower tourism opportunities in the regions. Thus, it is argued that, while tourism support organisations may indicate there is demand for further wildflower tourism opportunities, they may not be in a position or have the knowledge to make a business decision on the viability of such demand. On this basis, it is suggested that the advice provided by tourism operators may have more economic credibility and may be more reflective of the actual wildflower tourism demand in the study area.

6.3.3 WILDFLOWER TOURISM – DO INDUSTRY DEVELOPMENT OPPORTUNITIES EXIST IN THE STUDY AREA?

Tourism business operators have said the supply of wildflower tourism opportunities for consumers is satisfactory in the study area. Tourism support organisations disagree, and wildflower producers are mostly not really interested in expanding into tourism due, in part, to perceptions of negative impacts upon their agricultural

production systems and their lifestyles. Is there potential for wildflower tourism growth in the South West and Great Southern regions?

The short answer is therefore “maybe”, but not necessarily to any great extent. Across southern Western Australia, the past two decades have witnessed significant increases in the “sale of rural amenity” through tourism, particularly in relation to forests, beaches, vineyards and gourmet food products. Wildflower tourism opportunities could, at face value, tap into this interest. Opportunities for the commoditisation of the in-situ wildflower may evolve, and tourism businesses may be developed but, given the results of this research, the producer interest in this occurring appears very limited.

A clear research opportunity arising from this assessment is a full tourism potential analysis, considering actual demand from tourists and not the anecdotal perceptions of tourism business operators and support organisations.

6.4 CHAPTER SUMMARY

This chapter has sought to consider those trends in the development of the wildflower industry that might shape its presence in southern Western Australia into the future. The motivational factors driving participants, the industry demographics, the array and depths of relationships within industry networks, the broader political economy affecting wildflower production and sales, and the opportunities for expansion into complementary industries such as tourism have all been discussed.

The chapter has identified three potential modes of rural occupance existing within the wildflower industry during the time of this research, with representatives of two of these modes (‘rural amenity’ and ‘pluriactive’) responding positively to the research by participating and contributing, and producers who may, from a distance, be classified as representing the third mode (‘productivist agriculture’) largely choosing not to engage. This thesis does not suggest that other modes of rural occupance, as described by Holmes (2006), are not present in the southern wildflower industry. Instead, it suggests that, by using empirical data gathered during the research program, and by triangulating this data with advice provided by wildflower industry support officers, three clear modes can be identified.

Chapter Seven extends upon this basic classification of producers under Holmes' (2006) modes of production framework, to look closely at factors affecting the situatedness of producers along a spectrum of productivism and non-productivism which Wilson (2007) argues provides a sound basis for understanding producer behaviour in relation to multifunctional outcomes. Chapter Seven tests Wilson's approach, to determine whether it can shed light on how, if at all, producers may be influenced to shift towards consumption based or other non-productivist objectives in rural spaces, such as tourism. Chapter Seven also sheds light on the significance of individual personal decision-making upon agency at the local (farm) production level, and how this, albeit within a broader perspective of structural and exogenous factors, may still result in a producer making specific decisions which do not necessarily align with the general productivist ethos which he or she may have.

CHAPTER SEVEN – THE WILDFLOWER INDUSTRY IN A MULTIFUNCTIONAL RURALITY

7.0 CHAPTER OVERVIEW

This chapter considers the wildflower industry using the conceptual framework of multifunctionality in rural and agricultural scenarios, within the contexts described by authors such as Wilson (2007; 2008b) and Holmes (Holmes 2002; 2006). The purpose is to provide a framework in which to consider wildflower tourism opportunities and the level of interest in such opportunities, as expressed by the majority of producers during this research program. Due to the diversity in producers' aspirations from their involvement and the wide range of their levels of participation in the industry, a conceptual framework which considers the existence of 'multiple rurals' has been adopted. The integration of Wilson's (2007) multifunctionality spectrum discourse and Holmes' (2006) rural occupancy modes provides a platform upon which the industry can be described and considered in relation to future pluriactivity opportunities – particularly in relation to tourism. (Further background literature relating to the use of the concept of 'multifunctionality' in rural areas within this thesis can be found in Section 2.3.4).

In an earlier work, Wilson (2001) argued that political economy discourses on agriculture focus predominantly on external or exogenous factors, such as State-level policies, in driving agricultural change, and exclude local, internal or endogenous issues. Wilson's (2007) analysis of multifunctionality in agriculture, emphasises the value of incorporating grassroots level social and cultural capital in multifunctionality assessment. Wilson suggests that multifunctionality needs to be spatially located if it is to be meaningfully understood. Specifically, he argues that multifunctionality is about "the link between *human decision-making* and *spatial expression* of these decisions on the ground" (Wilson 2007: 257; emphasis in original) – with farm scale thoughts and actions being fundamental to multifunctional agricultural outcomes.

As such, multifunctionality, in Wilson's interpretation of the concept (which aligns with other recent discourses, including those of Holmes (2002; 2006) and an increasing rejection of the concept of 'post-productivism' by authors such as Argent

(2002)). Wilson suggests multifunctionality is not only about the physical or economic expression of pluriactivity and the capturing of its environmental and social benefits, *but it is about the thought processes and motivational drivers which affect the decision-making processes and actions at farm level*. It is within this context that multifunctionality is considered in this discussion. How do individual producers' thought processes affect their positions on the various aspects of rural production, land management and social factors which constitute multifunctionality? An understanding of the answers to this question will provide a platform upon which to consider future development opportunities for this small-scale agricultural industry.

To inform this analysis of the multifunctionality of the southern wildflower industry, Chapter Six of this thesis tabulated the local networks and the relationships within the industry in an effort to go beyond the political economy discourse and to reflect on local level drivers and influences that affect the trajectories of rural industry activity. This information is further considered herewith in conjunction with the specific backgrounds and experiences of, and influences identified by, the wildflower industry participants. Chapter Seven utilises this information, including the actor-network assessment provided previously, to propose that farm level thought and action affect the abilities of the industry to become more or less multifunctional. In order to address the multifunctionality statuses of wildflower producers, and their implications for industry development and diversification, this chapter analyses the position of the wildflower industry on the productivist/non-productivist spectrum which Wilson (2007) argues underpins multifunctional (rural or agricultural) transitioning.

Chapter Eight will then discuss the ability of producers to engage in tourism or other diversified and potentially socially and environmentally sustainable rural activities (that is, to shift to more multifunctionality), or to 'professionalise' in an agribusiness sense, and shift towards a more defined commodity production focus (and thus potentially embrace less multifunctionality), based on this discourse. Chapter Eight addresses how farm or local-level factors, including the motivations and lifestyle aspirations of industry participants, affect the position of the industry along the multifunctionality spectrum, and address the implications of this for

- the southern wildflower industry itself; and

- the development of tourism and other complementary rural industries in the study area.

The diversity and range of levels of engagement of wildflower industry participants creates a complex policy environment for agencies and authorities seeking to develop and/or regulate the industry. A response to the follow-on question “how can policy-makers address the complexities of a small-scale agricultural industry in considering and developing policy for multifunctional rural outcomes?” will be provided in Chapter Nine. That chapter will seek to identify how understanding the positioning of an industry, in this case the wildflower industry, along the multifunctionality spectrum, can assist in rural and regional policy development for small rural industries in contemporary Australia.

The intention of Chapters Seven, Eight and Nine is not to consider multifunctionality within the wildflower industry as a means of fostering, promoting, encouraging or facilitating the protection of this industry (or of any other) due to the positive external benefits of such production upon the region’s environment or social relations. Instead, the chapters adopt the notion of multifunctionality as a transitional process rather than “a relatively static and compartmentalised descriptor of agricultural and non-agricultural decision-making at a specific point in time” (Wilson 2007: 327). This notion of multifunctionality can be utilised in descriptive analyses in order to better understand rural change. Shifts in the wildflower industry are very much subject to individual decisions, influenced by a multiple array of social or family considerations, environmental concerns and economic objectives. This is particularly so at the small scale at which the wildflower industry exists in the study area. The desired outcomes for the reader are to be aware that possible movements within the wildflower industry are largely dependent on individual decisions, and to understand why tourism development (at this scale) was not seen as an option by the set of producers participating in this research.

7.1 ASSESSING THE SITUATEDNESS OF WILDFLOWER PRODUCERS ON THE MULTIFUNCTIONALITY SPECTRUM

To what extent is there evidence of a multifunctional transition occurring in the wildflower industry? To answer this question, this chapter reviews the data

presented in Chapters Five and Six in relation to factors which can express progress along the multifunctionality spectrum.

Wilson (2007; 2008b) warns against the inherent reductionism contained in the quantitative analysis which is implicit in many suggested frameworks for assessing multifunctionality, particularly those used in assessments associated with farm subsidy programs, such as those evidenced in Europe. As such, alternative, qualitative factors underpin Wilson's (2007) preferred framework for conceptualising the degree of multifunctionality occurring within a given rural system. These factors inform his argument that strong multifunctionality *morally* provides the best outcomes for agriculture (see also Wilson (2008b)), as discussed earlier in Chapter Two. The factors which Wilson considers to be useful in assessing multifunctionality are summarised in Table 7.1

Table 7.1 Qualitative multifunctionality assessment considerations

Qualitative multifunctionality assessment considerations after Wilson (2007)
(a) Productivist and non-productivist tendencies present within a farm decision-making arrangement;
(b) Degree of environmental stability;
(c) Embeddedness of farm activity into the local community (that is, "horizontally integrated rural/farming communities" (Wilson 2007: 229));
(d) Length of supply chain;
(e) Farm production intensity;
(f) Degree of (on-farm) diversification;
(g) Producer and community perceptions of the roles of agriculture and change occurring within agriculture and rural areas.

Previously, in Chapter Six, this thesis has suggested that wildflower producers in the South West and Great Southern regions during the study period (2001-2003) could be broadly classified under three of Holmes' (2006) 'modes of rural occupance' – rural amenity mode, pluriactive mode, and productivist agriculture mode. Section 7.2 will now seek to further explore this assertion, by reviewing the position of wildflower producers on the multifunctionality spectrum, and by utilising Wilson's qualitative assessment considerations as indicated in Table 7.1.

7.2 QUALITATIVE ASSESSMENT OF THE MULTIFUNCTIONALITY WITHIN THE WILDFLOWER INDUSTRY

7.2.1 PRODUCTIVIST AND NON-PRODUCTIVIST TENDENCIES PRESENT WITHIN A FARM DECISION-MAKING ARRANGEMENT

In order to assess the productivist and non-productivist tendencies present within a farm decision-making arrangement, information from a number of specific data sets provided by the industry participants are considered below. Specifically, these include:

- i. Producer age and demographics (utilising data from Figures 5.1; 5.2).
- ii. Backgrounds and previous occupations (of producers) (utilising data from Figures 5.4; 5.5; 5.12; 5.13; 5.19).
- iii. Current and previous residential locations, and time spent at current and previous addresses (utilising data from Figure 5.3; 5.3; Section 5.2.2.1).
- iv. Rate of participation and depth of industry involvement (utilising data from Figures 5.6; 5.7; 5.8; 5.10; 5.30; Table 5.3; Section 5.2.2.5; Section 3.2.2.5).
- v. Property size, tenure and area cultivated (utilising data from Figures 5.8; 5.9).
- vi. Annual income derived from wildflowers and desire to earn more income (utilising data from Figures 5.10; 5.11).
- vii. Other income sources (utilising data from Figure 5.12).
- viii. Motivations for entering the industry (utilising data from Figures 5.13; 5.14).
- ix. Expectations from industry involvement (utilising data from Figure 5.13, 5.15).
- x. Five-year intentions and future aspirations (utilising data from Figure 5.17).
- xi. Lifestyle comparisons with previous occupations (utilising data from Figure 5.13, 5.14, 5.18).
- xii. Identified industry issues (utilising data from Figure 5.19; Section 5.2.2.4).

Each of these points is considered below, in relation to how the responses of wildflower industry participants impact upon the situatedness of those participants along the productivist/non-productivist (p/np) 'thought and action' spectrum that, Wilson (2007) argues, underpins the 'new' multifunctionality interpretation which sees this concept as more than simply an agricultural externalities function. As discussed in Section 2.3.4, multifunctionality has been largely considered within the context of payments for the positive externalities of agricultural and rural activity within many European arrangements over recent years – see, for example, Marsden and Sonnino (2008). Wilson's approach extends beyond this interpretation, and fits partly with Marsden and Sonnino's (2008) classification of multifunctional agriculture as 'part of sustainable rural development'.

i) Producer age and demographics

The impact of producer age and general demographic profile upon the multifunctionality spectrum status of individual properties and of the southern wildflower industry as a whole relates to the producer's willingness, time, energy and personal physical capacity to diversify operations. With the modal age bracket for growers and pickers being 50-54 years, questions arise as to whether age is associated with diversification into wildflower production.

However, in considering multifunctionality as *more than* simply agricultural diversification, there is a likelihood that some wildflower producing farms will become more multifunctional (that is, exhibit tendencies of stronger multifunctionality) as the producers age. Why? Because the majority of producers represented owner-occupied farms, or 'family farms', where the labour supply is limited to that which can be obtained from the (family) occupants – generally at low or no direct cost. As age affects physical ability to participate, but financial returns are limited (and thereby producers are unable to recruit external labour), there is a probability that many farms will "scale back" wildflower operations. (This may also include the scaling back of other farm activities that require intensive, hard physical work). The result, potentially, may be an increase in other land-based activities which indicate stronger multifunctionality through various environmental, economic or community social benefits related to rural land management.

Furthermore, the majority of participants did not indicate – even when directly asked in interview situations – that adult children involved in the family farm (where

appropriate) were interested in or prepared to take over wildflower production activity. Responses to this question generally indicated insufficient returns and a lack of interest from others involved in the family farming operations.

Gender analysis adds some further value to this discussion. As noted in Figure 5.2, for wildflower growers, there was a near-even division participation rate of men and women, including where members of a partnership (husband and wife or family farming arrangement) both contributed to the research. However, this varied for pickers, where a majority ratio of nearly 2:1 males to females was noted. The hard, physical nature of wildflower picking was raised during interviews, and at times was given as a reason for the lesser participation of women in the picking industry. In relation to multifunctional transition pathways in the wildflower industry, it is suggested that, while picking attracts a different gender balance of participants than does cultivation, this may have little impact on transition pathways. This is because the contribution of wildflower picking (from State Forest or public land) towards agricultural multifunctionality in the South West and Great Southern is considered limited. (The primary reason underpinning this assertion relates to land tenure and the direct ability of producers to influence land or resource management for multifunctional outcomes). The difference in the roles of pickers and growers in the multifunctional transition is discussed further in Section 7.2.2.

In summary, however, the impact of demographics on the productivist and non-productivist decision-making tendencies within the set of wildflower producers in this study relates predominantly to the decisions which producers make that are influenced by their age and willingness to take on more or less (physical) work. The growers surveyed during this research program were predominantly owner-occupiers (89%) with reasonably secure land tenure and freehold status (63%) while having a strong ability to make decisions about *their own property's multifunctionality* (and therefore to potentially contribute directly to stronger or weaker multifunctionality if so desired).

ii) Backgrounds and previous occupations (of producers)

Consideration of the backgrounds and previous occupations of producers provides scope to discuss the range of experiences that may influence decision-making within the industry. As depicted in Figure 5.4, pickers and growers could again be differentiated in a review of previous occupations.

The majority of industry participants cultivating wildflowers self-identified as being from professional backgrounds, which included professions such as dentistry and engineering. 'Farmer' was the next highest response, although this must be qualified by the fact that many respondents indicated that they were 'always farming' (as per Figure 5.5 – 26% of respondents), so the agricultural background of participants is actually higher than that indicated in Figure 5.4.

The decisions of existing farmers to enter the wildflower industry potentially imply some movement along the multifunctional spectrum (with diversification from more traditional agricultural products). However, *if* the individual farmer chose to enter the industry with a very commodity focused, agri-business approach, there is a likelihood that less multifunctionality could occur. With the (known) set of wildflower producers in the South West and Great Southern regions at the time of this study, there were growers who, it can be assumed by their apparent scale and relative level of professionalism, would sit close to the 'productivist' end of the p/np spectrum. However, as noted earlier, there was a tendency for such producers to *not* participate in the research.

For those with a 'professional' background, there is an assumed level of education and associated ability to investigate (and potentially fund – dependent on their success in their previous career) new agricultural opportunities.

The majority of producers identifying previous employment which could be classified as 'unskilled labour' (for example, mill workers, farmhands) were pickers, who thus had potentially lower access to capital than did those with previous farming or professional careers. (This assertion is also related to the assumption that lack of land tenure over picking areas could be associated with a limited ability to raise capital against land).

What this information indicates is that the backgrounds of producers affect where they may sit along the multifunctionality spectrum at any point in time. Furthermore, the backgrounds will affect the decisions that producers make regarding the directions they choose to follow along the spectrum. What cannot be assumed, however, is that the backgrounds of producers will automatically drive them in a given direction along the multifunctionality spectrum. There were no clear linkages between the multifunctionality trajectories followed and the specific backgrounds of producers. This was also evident in the "Motivations for entering the wildflower

industry” (Figure 5.13) and the “Industry issues – identified by producers” (Figure 5.19), where there were no clear correlations between the issues and motivations noted by producers, and the backgrounds of those producers.

Thus, while the producer backgrounds, including the influence of these backgrounds upon their access to capital and (land) resources, may influence their *ability* to transition in either direction along the multifunctionality spectrum, they do not necessarily affect the direction followed along the spectrum.

iii) Current and previous residential location, and time spent at current and previous addresses

The implication of the ‘current and previous residential location and time spent at current and previous addresses’ in influencing the productivist and non-productivist tendencies of wildflower producers relates to the embeddedness of the producer within agriculture and within a community, as well as to their financial security, and to general lifestyle issues. It is also affected, depending upon the specific location, by the nature of the actual locality and the geographical attributes which may render it more or less suitable for non-productivist paths such as agricultural or rural tourism to be followed.

Wilson (2007) discusses the impact of geography and location upon multifunctionality in rural spaces, taking into account factors such as the distance from/to urban areas (and thus from consumers, such as tourists) and the existence of attractive features (for example, beaches, mountains), especially in relation to the ‘sale of rural amenity’ through tourism. Dibden and Cocklin (2009) note similar implications from the distance to urban areas, for more remote rural spaces in Victoria, Australia. In line with these findings, for those wildflower producers located near major urban centres such as Bunbury and Albany, and within reasonable commuting distance from Western Australia’s capital city (Perth), opportunities for diversifying into activities such as tourism may exist. Existing strong tourism activity in places such as Denmark and Margaret River exemplifies this.

However, as Wilson points out, the opposite also applies. “Regional and local weak multifunctionality pathways may, therefore, not be a matter of choice but of *necessity* due to lack of alternative non-productivist pathways” (Wilson 2007: 281).

This was recognised by producers within the case study in inland, lower rainfall, 'wheatbelt/woolbelt' localities where tourism opportunities were very limited. As a result, it can be seen that, specifically in relation to tourism diversification, the geographical attributes of a property and its locality will have an important influence upon the productivist and non-productivist tendencies of producers on that property.

This is not to say that those in inland areas with less apparent tourism value or capacity have a lower ability or tendency to be strongly multifunctional. Tourism diversification is but one element of many aspects of multifunctionality which a producer can consider either consciously or sub-consciously. Others include the non-farming (or protection or stewardship) of remnant vegetation on property, or the use of water regimes in production which may be more environmentally sustainable for Australian native species than those required by introduced cultivars. These ideas are explained further in Section 7.2.2.

The time spent at current and previous addresses indicates, to a certain degree, the potential for community embeddedness – based on an assumption that producers who have been present in a locality or community for an extended period of time will be likely to have local networks which may have positive community development implications. The opposite also applies for newcomers or new migrants, where they may not have had time to develop significant local networks at a personal, social, cultural, production or industry support level. However, particularly in areas with high rural amenity value, there exists the potential for newcomers to strongly pursue lifestyle values which include the development of strong community networks. This concept has been discussed by authors such as Curry *et al* (2001) and Selwood *et al* (1996) in relation to parts of southern Western Australia. Where newcomers enter rural communities with preferences for strong community engagement and interaction, tendencies towards strong community embeddedness can further affect rural change by creating a more attractive, cohesive, multifunctional rural space which in turn attracts other newcomers and/or tourists seeking their own rural idyll.

Both wildflower producer segments (growers and pickers) indicated their average lengths of time in the industry as being greater than nine years, which can be considered to indicate relatively long tenure within social, industry and economic networks at a local level. Long-term commitment to a locality, particularly at owner-occupier level, *may* signify tendencies towards stronger multifunctionality through social interactions or community embeddedness. However, this cannot be assumed

because there is no guarantee that a long-term presence will result in engagement and activity within the local community, or lead to community development outcomes.

Furthermore, as noted above, the opposite may apply – newcomers may bring with them a rural idyllism which leads to strong personal engagement at a local community level. The willingness of rural communities to engage with ‘others’, including new residents, also requires some consideration. A mutual responsibility exists here, or a ‘two-way street,’ in which communities must be prepared to accept diversity and newcomers in order for difference to contribute to increased multifunctionality at the local community level.

Thus, strong conclusions regarding the length of time spent at an address and the implications for multifunctionality at the rural community level cannot necessarily be drawn.

iv) Rate of participation in the industry and depth of industry involvement

Rate of participation

The relationship of this factor to the overall Section 7.2.1 heading “Productivist and non-productivist tendencies present within a farm decision-making arrangement” lies within the oft-quoted description of the southern wildflower industry as having a ‘cottage-industry mentality’.

The notion of a ‘cottage industry mentality’ relates (generally in a negative way) to the perception that the industry participants are small-scale and unsophisticated operators, with relatively low levels of commercialisation and integration into the corporatised agricultural economy. A ‘cottage industry’ may, using Wilson’s (2007) p/np spectrum, be situated towards the non-productivist end of the continuum.

The data obtained in this research program in relation to the level of participant involvement indicates that half of the growers considered themselves to be amateur, and the other half, professional (Table 5.3). The majority were part-time wildflower producers, and approximately one third indicated gross wildflower incomes over \$50,000 (Figure 5.10). What this suggests is that the majority of growers are part-time, with relatively low incomes from wildflower production yet, as noted in Figure

5.8, two thirds had freehold property tenure, and thus potential to mortgage property to raise capital for expansion if so desired. However, as discussed in Section 5.2.3.3, growers at smaller scales aspired to comparatively small income returns, compared with the larger scale producers, and were more satisfied to earn lesser amounts.

The implication of the combination of these data sets is that, for many smaller scale producers there appears to be a disinclination to expand effort and production to a scale that could enable full-time, professional participation. Thus, there are indications of a desire to remain small-scale or 'cottage industry'. Based on this assessment, such producers would be located within the moderate multifunctionality (middle) classification along the p/np spectrum. Either the 'pluriactive mode' or 'rural amenity mode' described by Holmes (2006) may be appropriate classifications for these growers, depending on other factors relating to lifestyle.

Growers operating as full-time wildflower producers were those with higher income levels. These producers were more inclined to raise concerns regarding corporate development issues for the wildflower industries – for example, in relation to labour supply, staff training and variety development. These growers would be classified as being within the 'productivist agriculture mode' suggested by Holmes (2006), and situated towards the productivist end of Wilson's (2007) spectrum.

The purpose of the above discussion is to indicate that the extent to which producers participate, and the endogenous factors which affect that extent – such as their desired level of income, both reflect and affect the tendencies towards productivism or non-productivism within any particular farm business.

Furthermore, it may be possible to draw a partial conclusion that there exists, within the industry, a group of wildflower producers who are quite satisfied with their moderate to low level of production activity, and who do not possess a significant desire to greatly increase their production effort.

It should also be noted that data from wildflower pickers have been specifically excluded from the discussion above, because the actions of pickers do not necessarily reflect productivism or non-productivism under the agricultural context of these terms as used within this thesis. Eighty per cent of pickers considered themselves to be professional operators, and a similar proportion desired a greater

income from picking. However, pickers need very limited capital investment requirements in order to participate in the industry, and can be considered as 'owner/operator' small businesses (usually an individual or occasionally a couple, with both requiring a picker's licence). The ability to expand on their individual levels of industry participation is bounded by parameters of individual time availability, fitness, personal drivers, access to forest blocks, and licensing issues. The factors relevant to growers, relating to land, levels of capital investment needed, employment and training of staff, etc, are more complex.

Thus, the ability of the individual picker to choose a location along the p/np spectrum in relation to wildflower production is limited, because many of the factors being assessed in this multifunctionality discourse – such as 'farm production intensity' and 'degree of on-farm diversification' are not directly relevant to the majority of pickers. However, the aggregated impact of pickers in relation to production and environmental management functions within the wildflower industry is important and has significant implications for future industry trajectories. This is further discussed in Chapter Eight.

Depth of involvement in industry activities

The depth of producer involvement was examined during the research program through the questionnaire and survey phase, and again in considering the actor-network relationships presented in Figure 5.20.

From the initiation of the research the advice provided from industry support officers was that some of the larger producers were not involved in industry development activities, including interaction with Flowerswest and other groups. This aligned with the non-participation in the study of many of those growers whose operations could be classified as productivist, corporatised and very professional.

Industry group participation was undertaken by newer, less experienced producers, who endeavoured to obtain as much information as possible relating to wildflower production, especially given the difficulties for newcomers as highlighted in Section 5.2.2.5. More experienced producers generally indicated that they had previous involvement with producer groups, but that the information and support obtainable from industry groups became less relevant and/or less sophisticated and appropriate to their needs, as the growers became more experienced.

As such, it can be summarised that experienced and more professional growers were *generally* (although not always) less inclined to participate in grower groups than newcomers whose information and support needs were much greater. The tendency, therefore, in relation to productivist and non-productivist decision-making processes of newer producers was that producer groups were accessed in order to assist newer producers to become more productivist, through the acquisition of knowledge and advice from industry sources.

v) *Property size, tenure and area cultivated*

The factors of property size, tenure and area cultivated both affected, and are affected by, the tendencies of producers to make decisions to shift in either direction along the p/np spectrum. These relate to economies of scale, where the producer has the land and the security of tenure, *and the inclination*, to increase production. The age demographic, as discussed earlier, may be a significant factor in the large proportion of producers who identified freehold status and thus secure tenure of their properties.

The nature of their property tenure (Figure 5.8) affects the ability of producers to take a risk. For wildflower pickers, the weak form of tenure, whereby State Forest blocks are allocated by government to pickers means that, while pickers have limited power to influence their own ability to expand their picking area, they also take on very little risk due to the minimal capital investment involved. The 'tenure' associated with the allocation of State Forest or Crown Land blocks to pickers provides for usage rights within a defined area over a specific period of time. However, these pickers have very little ability to influence resource or land management practices for stronger or weaker multifunctionality outcomes, due to their lack of management responsibility.

The majority of growers, however, are owner-occupiers, and, in line with Wilson's (2007) acknowledgement, they have the most control over their ownership/property management decisions, since they are generally not constrained by others in their decision-making activities. This is particularly so for the large proportion of growers with freehold land tenure. This factor implies that there is not a significant financial profitability imperative (that is, to meet mortgage payments) that may drive an increase or decrease in their wildflower production levels.

However, within the owner/occupier (predominantly 'family farm') status, there may be complexities which affect the decision-making ability of producers. For example, for some family farms, decisions may require input from more than one farmer or farming couple, and this can lead to complexities in how, and over what time scales, decisions to adapt and modify agricultural trajectories can be made. In this current wildflower industry research, only one producer identified complex family farming arrangements, with siblings, parents and uncles involved in a broader agricultural operation. This affected the family's ability to make decisions to expand, reduce or diversify activity, but it did not necessarily affect the outcome of decision-making. The implication is, however, that family relationships may impact upon choices made and paths taken, where several family members have an economic or other stake in a farming enterprise.

This aligns with the model provided by Wilson (2007: 278) which identifies that owner occupiers have available to them a wider range of 'enabling factors', which allows for greater control over the trajectories of farm activity. Tenant farmers, according to Wilson (2007), have the lowest ability to influence their position on the p/np spectrum. However, as he notes, while farm ownership patterns affect the range of decision-making opportunities available, they do not influence the *quality* of the chosen multifunctionality pathways. 'Quality', to Wilson, relates to his ongoing preference for strong multifunctionality as being morally superior to weak multifunctionality in agricultural enterprises and systems. While this thesis does not necessarily take Wilson's stance on the moral superiority of strong multifunctionality, it does accept that the author's modelling of multifunctionality transitioning and the influences upon that transitioning provide a sound tool for analysing the state of, and predicting future pathways for, the wildflower industry.

Property size and area cultivated (Figure 5.9) indicate another 'enabling factor' for growers to move in either direction along the p/np spectrum, particularly for owner/operated farms, where there is additional arable land and available water resources to expand floriculture as and if desired. Producers without secure tenure have relatively less ability to expand operations where to do so will require input and decision-making from third parties (such as landlords).

vi) Annual income derived from wildflowers, and desire to earn more income

The significance to the producer of the annual wildflower income and the desire to earn more is likely to influence the position of a grower on the p/np spectrum, if, for example, their desire for increased income shifts them towards economies of scale, increased production and higher turnover. However, while the majority of wildflower producers were interested in some income increase, the level of interest expressed by producers was not necessarily sufficient to argue an industry-wide shift towards weaker multifunctionality based on this aspect alone.

In the case of the southern wildflower industry, there was limited evidence of debt levels in relation to farm ownership, or related explicitly to the wildflower business within an existing pluriactive or mixed farming arrangement. If high debt levels had been apparent, there could be an argument that the need to service debt could influence a shift towards the productivist end of the spectrum, in order to meet required payments.

Thus, the income (earned and desired) and debt levels of a wildflower producer have the ability to greatly affect their decision-making tendencies towards lesser or greater levels of productivism. These factors contribute to the overall decision-making of an individual producer, which will include other values and desires such as lifestyle goals.

vii) Other income sources

Most other income sources indicated by producers were from existing farming activities (in relation to growers) or unskilled or semi-skilled labour (in relation to pickers). Having other income sources enables personal financial risk management, and may be associated with an ability to remain 'on the land' should any one (or more) of the income sources decline or fail. Livelihood diversification is thus used for personal income security.

Although a large proportion of pickers indicated no other income sources (supported by their self-assessment as professional, full-time producers), their situatedness in the multifunctional transition assessment is unique because the majority do not have tenure over any land, even though they 'produce' export-quality agricultural product. Pickers could not readily be classified as 'farmers' but were fundamentally

producers. On the p/np spectrum, therefore, for those pickers for whom the entire income was reliant on picking, but was limited by access to forest blocks and personal ability in relation to volumes able to be picked, a desire for generating more income would require either a shift towards picking more product, or personal income diversification into other (non-picking) activities. This does not necessarily indicate a willingness to shift in either direction along the p/np spectrum, because income earned and desired must be seen in line with other factors influencing decision-making at a farm or individual level.

viii) Motivations for entering the industry

As detailed in Figure 5.13 and summarised in Figure 5.14, 47% of the industry entry motivations of producers can be classified as economics or productivity based, while 50% can be deemed to be lifestyle-related reasons. This category encompasses a broad spectrum of factors being considered in the multifunctionality analysis throughout this Chapter.

Producers, when interviewed or surveyed, could suggest one or many motivational factors for their involvement in the wildflower industry – and there was no mutual exclusivity about lifestyle, environmental and economic factors. Many producers indicated both economic and lifestyle reasons, while some also mentioned perceived environmental benefits from wildflower production compared with the cultivation of non-native species in the Australian environment. The overall indication was that income was a very important consideration in entering the industry, but so were lifestyle factors, and there was no mutual exclusivity between the two sets of considerations. Producers can thus be identified as shifting in either direction along the p/np spectrum even within this one element of the multifunctionality assessment. Both productivist and non-productivist tendencies could be identified within individual actors.

The implication from this for the multifunctional transition assessment, and in relation to producer decisions, is that growers can, and do, shift in their thinking processes, between productivist and non-productivist outcomes associated with producing an agricultural commodity. This signifies that transition along the multifunctionality spectrum is indeed possible and plausible at any given time, for the individual producer, based on the weightings that they personally apply to lifestyle and productivity at that time. Furthermore, these weightings are likely to

vary through time, because they will be affected by the influences upon a producer's decision-making at any given point.

ix) *Expectations from industry involvement*

The expectations of the producer prior to entering the wildflower industry indicate not only their initial thoughts and actions, but also how they intend to continue within the industry, and thus their situatedness on the p/np spectrum. While the majority of study participants did not indicate whether their initial expectations were met (see Figure 5.15), those who did provide an indication predominantly (over 50%) felt that their expectations had not been met. One third believed their expectations were met, and less than 10% of growers felt their expectations had been exceeded or they had no expectations at the outset.

This factor can affect the personal or individual decision-making processes of producers, because it can signify their potential dissatisfaction with personal progress as a producer, or with the workload, risk or returns. The implication for the position of the producer on the p/np spectrum is that the producer's individual contributions to the industry may be affected by whether they feel they are obtaining due financial or lifestyle reward or satisfaction. The producer's degree of industry involvement and production may change depending upon their self-assessed level of satisfaction or reward from participating in wildflower production.

Pickers were asked about the level of enjoyment achieved from their involvement in the wildflower industry. While this does not directly reflect their initial aspirations, it indicates their situatedness on the n/np spectrum at the time of the research program, and may signify their level of desire to remain in the industry. As depicted in Figure 5.16, a clear majority enjoyed the lifestyle and picking, although pickers were divided over whether they would recommend the job. As discussed earlier, this may be related to personal protection of their own business and preference against competition for State Forest blocks in the future.

Whether or not pickers had *initially* expected enjoyable jobs and a satisfactory lifestyle, their indications that both were achieved assists in positioning pickers somewhere in the centre of the p/np spectrum.

x) Five-year intentions and future aspirations

Producers were asked where they would be in five years time, in relation to wildflower production. Three quarters, as depicted in Figure 5.17, were keen to remain in the industry, with less than 10% believing they would not be producing wildflowers. In relation to the productivist and non-productivist tendencies present within farm decision-making arrangements, it is probable that this intent to remain in production (or picking) will remain. This is, however, subject to exogenous influences such as changes to government policies in relation to picking and exporting, economic returns, and other supply-chain issues. With regard to factors over which producers have direct control (that is, over their own thoughts and actions) they expressed an intent to remain in production.

xi) Lifestyle comparisons (to previous occupation)

At the commencement of this research, and following advice from industry support officers, it was envisaged that many producers tended towards small-scale activity and a preference to maintain lifestyle rather than achieve economic reward at the expense of lifestyle attributes. The 'trade-off' between economic return and lifestyle benefits, according to personal desires and expectations, correlates somewhat with the productivist and non-productivist spectrum, albeit at an individual producer level. 'Hobby' farmers, or those not seeking to earn a significant profit from agricultural activity, are described by Wilson (2007) as being situated near the non-productivist end of the spectrum.

While Figures 5.13 and 5.14 indicate the depth and importance of lifestyle factors to producers' motivations, there was no direct evidence from the study participants that they *did not* seek to make a profit. While a small proportion of producers identified themselves as 'hobby farming' – in terms of not *needing* to make a profit, some financial return was still desirable, as long as their lifestyles were not compromised beyond personal limits in the process. This suggests the existence of a target income (range) to support a preferred lifestyle, rather than income maximising behaviour which may be perceived to result in maximum economic return with a probable loss of lifestyle benefits.

Many part-time producers (including both growers and pickers) further noted that they were happy to shift the supply chain management to someone else, such as

local wholesalers, in order to limit their personal involvement to the lifestyle-friendly aspects of wildflower production, rather than concentrating effort on value-adding, marketing or sales opportunities which could, in theory, generate greater levels of income. This behaviour indicates potential shifts, however minor, in both directions on the p/np spectrum, dependent upon the individual producer's thoughts and actions.

The example of part-time farmers is particularly interesting as these farmers often choose moderately multifunctional development pathways, precisely because they lack the time and commitment to embark on purely productivist trajectories on the one hand (which often require full-time commitment) while also lacking the time and energy needed to move the farm completely towards the non-productivist end of the spectrum. (Wilson 2007: 275).

The above quote illustrates both the importance of 'time and energy' – as lifestyle related influences – and the dichotomy that can exist in the decision-making influences of an individual agricultural operation. Wilson makes this statement with reference to the ability (and willingness) to commit to production goals, and the implications of this upon the level of multifunctionality (as opposed to being simply pluriactive, which part-time farming may imply).

The changes to lifestyle that resulted from the entry of a grower into the wildflower industry are depicted in Figure 5.18. Of those who indicated that a change had occurred to their lifestyle from wildflower production, approximately 45% felt their lifestyle had improved, while the remainder were at best non-committal ('Different, OK'), or expressed negativity or concern about the impact of this move.

Lifestyle issues have the ability to strongly influence the productivist and non-productivist tendencies of producers, and this may be especially so in the wildflower industry where a high proportion of producers are aged over 50, and are financially stable (as indicated by high levels of freehold land tenure). The physically demanding nature of cultivating, harvesting, preparing for transport and packing a very perishable product indicates "hard work". Those producers in a relatively comfortable financial position will have a higher ability to choose at what level they wish to trade lifestyle for income, than those who are either full-time dependent upon wildflower production for income, or who have financial commitments for which (additional) income must be generated – such as a mortgage.

xii) Identified industry issues

The broad range of industry issues identified by producers, as depicted in Figure 5.19, address the political economy or supply chain concerns of producers. These factors can directly influence the productivist and non-productivist tendencies of producers, depending on how great they perceive the impact of these issues upon their own wildflower production paths.

The outcomes of industry activity relating to any of the product research and development, agronomy, marketing or government regulation issues, for example, may influence a producer to shift along the p/np spectrum in either direction, depending on how they see the impact of such factors on their production and marketing arrangements.

7.2.2 DEGREE OF ENVIRONMENTAL STABILITY

The degree of environmental stability present within individual wildflower-producing farms and within the action of wildflower pickers varies. However, a number of environmental themes emerged during the research program. Environmental stewardship, remnant vegetation protection, and cultivation aligned to more sustainable water management regimes were all cited. Such issues are further discussed further below.

Wildflower pickers were generally adamant that their practices were sustainable, and that their individual and combined knowledge of forest ecology, as a result of (on average) ten years picking, was exceptional. Pickers believed that their harvesting was relatively benign, although most acknowledged that unprofessional pickers, referred to colloquially as “cowboys” could be destructive and also provided a bad image for the industry. Many pickers saw themselves as stewards of the environment, with deep knowledge of specific, yet controversial, issues such as controlled burning practices, and the impact of these on the regeneration of forest vegetation. Furthermore, the adoption of a number of standard practices, such as only harvesting 10% of any given plant or any given area, supports the argument that there is some environmental sustainability associated with wildflower picking.

Further *potential* environmental stability arguments can be cited when comparing the land management requirements for cultivating crops that are more aligned to the

water and landscape capabilities of southern Western Australian ecosystems. Many growers flagged this issue as both a motivation and a personal justification for involvement in wildflower production. This sense of 'environmental stewardship' or a feeling of 'doing the right thing by the environment,' was regularly identified by producers in interviews and questionnaires.

In the broader Australian context, environmental stewardship lies within a complex policy arena. The provision of ecosystem services as a positive externality of agriculture has been discussed by many authors, including Cocklin *et al* (2006), Dibden and Cocklin (2009), Hamblin (2009), and Roberts and Pannell (2009). This issue is the focus of significant policy debate in Australia at present, particularly given Australia's official rejection of multifunctionality within the context used in relation European agricultural subsidies (Cairns Group 1999; Dibden and Cocklin 2009).

Whether specific ecosystem services are being delivered by the cultivation of wildflowers or by harvesting from native vegetation, is debatable. Where stands of (remnant) native vegetation on properties are managed predominantly for the environment but occasionally selectively harvested by pickers (three properties in the study), there could be some argument for the agricultural system to be considered multifunctional due to this service. However, as Wilson (2007) notes, environmental sustainability is an important component of multifunctionality, but it is only one component. This differs from the European Union / Common Agricultural Policy sense of multifunctionality, where the provision of environmental services (for payment or agricultural subsidy) may be justified as a multifunctionality activity on its own.

7.2.3 EMBEDDEDNESS OF FARM ACTIVITY INTO THE LOCAL COMMUNITY

Embeddedness in the *local community*

The embeddedness of farm activity into the local community is considered by Wilson (2007) to be an essential element of the classification of farms or farmers along the multifunctionality spectrum:

Actors in moderately multifunctional systems have higher levels of local embeddedness than those in weakly multifunctional systems, and show

some evidence of horizontally integrated rural/farming communities with close(r) interaction between local rural communities and their farming populations. (Wilson 2007: 233).

This aligns with the postulate that endogenous and local factors affecting the individual decision-maker have a determining role in the position of the producer on the p/np spectrum. Where a producer feels comfortable and integrated within and committed to a local (rural) community, there may be an inclination to remain so.

The assertion that local embeddedness can impact upon the position of a producer on the p/np spectrum relates to the question of the influence of endogenous versus exogenous factors upon human decision-making. Where producers are comfortable and relatively stable in a community, emotional, family or lifestyle factors associated with that comfort may impact upon their production decisions, such that purely productivist thought may not underpin all decisions.

Where producers do not have emotional, family or friendship ties within a community, there is the potential to sit more towards the productivist end of the spectrum, with the purpose of operating in a locality merely relating to the producer's ability to achieve maximum production in that locality. Where producers are influenced by emotion and factors such as a 'sense of place' and a personal commitment to improved environmental stewardship in the local area (as exemplified in the noting by a number of producers that they were current or previous community Landcare group members), production decisions which are not solely based on economic return potential (that is, productivism) are possible. The implication is that such factors may be illustrated through decisions which reflect non-productivist ideals, but take into account other, more personal values of the decision-maker.

In the case of the southern wildflower industry, producers averaged approximately ten years in the industry, with the majority not shifting a significant distance in their most recent (if any) property relocation (see Figure 5.5 and Section 5.2.2.1). This provides a potential indicator of commitment to the locality, if not the community, as well as to the industry.

Where many producers of one product exist locally, there is also the potential for a support network to build, albeit given the concern noted in Section 5.2.2.5, that new

growers found difficulty in engaging with existing growers for advice. This has been noted in other work, with Wilson (2007) identifying that local embeddedness may be fairly weak if the producer is a newcomer or an urban-rural migrant. Issues of power and class, at an industry level and at a local level, can emerge, as reflected by both older and newer growers highlighting this concern. This is also reflected in the picker/grower dichotomy by which growers treat pickers as 'lesser' producers (although pickers provided the bulk of Western Australia's export wildflower volume). Similarly, pickers expressed dissatisfaction at being treated with contempt by growers who they perceived as having assumed a superior hierarchical position in the industry.

Furthermore, as noted by Murdoch (2006: 414), the ability of rural areas to "participate in the broader economy is contingent upon flexible networks of interactive, trust-based relations". This is so at the community level in relation to the impacts upon producer decision-making, but also at an industry level, as discussed below in relation to *industry* embeddedness. The lack of trust which is shown when representatives of various sectors of the industry question the role of other sectors – such as in the picker versus grower arguments – has the ability to undermine industry development.

Also warranting further discussion is the argument that "globalisation leads to a progressive lack of self-reliance and the loss of local social embeddedness of farmers" (Wilson 2007: 230), particularly in relation to contract agriculture, where farmers are contractually obligated to supply specific quantities of product. Wilson identifies the corporatisation of agriculture (associated with globalisation tendencies and a high productivist ethos) as being weakly multifunctional. Within this current study, there was no evidence of large, multinational and/or corporate farms being involved in wildflower production. As discussed earlier, the majority were owner/operator establishments, with moderate or low turnover. As such, for the wildflower industry, with the majority of producers being self-reliant, residing in or very close to the locality of their wildflower-producing property, and with many years in the industry, it can be concluded that *on this aspect of multifunctionality*, the producers can be classified as moderately to strongly multifunctional within Wilson's (2007) model.

Industry embeddedness of individual producers

In addition to embeddedness within the local community, the embeddedness of the individual producer within the industry – as indicated by the depths of the relationships between actors highlighted in the wildflower industry network diagram (Figure 5.20) – has additional implications for both their positioning and for the trajectories they take along the p/np spectrum.

For those producers consulted in this research program, the degree of integration of the individual or farm business into the network of the industry was a very important factor impacting upon the length of stay, depth of involvement, productivity and innovation.

The question of whether strong embeddedness in *industry*, as evidenced from factors such as involvement in industry groups and understanding and knowledge of the specific supply chain management, can be linked to weaker or stronger multifunctionality was considered, yet no strong conclusion could be reached. Many more established wildflower producers indicated they were no longer members of industry groups. The trend shown was that producers joined an industry group when entering the wildflower industry, then ceased involvement when the ‘rate of return’ from the investment of one’s time declined to a level that individuals felt they were no longer getting value from the group(s). The ability of an industry group to meet growers’ needs may decline, or producers might professionalise and become more productivism-oriented and not want to share information and help new entrants. However, this was not always the case, and there was evidence of some growers remaining in grower groups after longer periods in the industry, albeit to a limited degree.

What became apparent, however, was that the producers who tended towards the more productivist end of the p/np spectrum were those with greater awareness of, and involvement in, the commodity chain, and a higher degree of experience in the wildflower industry activity at a national and international level. Vertical integration in the supply chain, and the depth of relationships within that chain, were stronger for those who tended towards higher degrees of productivism.

As discussed in Chapter Two in relation to actor-network analysis, it is the depth of relationships that is important in understanding the implications of an actor-network.

With regard to the wildflower industry, those producers who had stronger linkages to the actors and entities whose roles related predominantly to the production function and who appear vertically along the supply chain, could clearly be differentiated from others as tending towards productivism. Those producers who showed little interest in the vertical networks and relied instead on others (for example, wholesalers) to maintain the vertical-network relationships, and chose instead to maintain horizontal networks (a potential indicator of community embeddedness), were those whose participation in the industry fell within the strong-to-moderate multifunctionality positionality.

7.2.4 LENGTH OF SUPPLY CHAIN

Wilson (2007) argues that, in agricultural industries, shorter supply chains indicate less risk and stronger multifunctionality, and vice versa. For the wildflower industry, with the bulk of produce being exported, there is an overall tendency for weak multifunctionality on this aspect. Furthermore, as argued in the previous section, those producers who focused on developing the relationships along the vertical networks of the supply chain are those with a more productivist approach.

In relation to horizontal networks and shorter supply chains, while Wilson (2007) sees this as contributing to stronger multifunctionality, it can be argued that the implication for the industry is that the 'cottage industry mentality' will be maintained should these characteristics intensify. Hobby farmers and part-time or lifestyle producers may be satisfied in leaving the marketing and monitoring of supply chains to others on the vertical networks. They could therefore be seen as shifting in both directions along p/np spectrum. This duality may occur where industry participants are *producing* at the bottom of a lengthy export supply chain, but are simultaneously influenced by lifestyle or other non-production factors to a greater degree than by income generation or productivism.

7.2.5 FARM PRODUCTION INTENSITY

The degree of farm production intensity is a further factor which may inform the understanding of the positioning of a producer on the p/np spectrum. As noted above, a high level of corporatisation in an agricultural business may suggest a productivist positioning on the multifunctionality spectrum. However, in the case of

the wildflower industry, modest- or small-scale family farm or owner/operator establishments predominated.

For the majority of producers, the level of integration with global capitalist markets was limited. Most did not employ staff, and were restricted in production intensity by the supply of (often unpaid) family labour. Capital investment in wildflower production was also quite low for the bulk of producers engaged in the study. As a result, farm debt levels were relatively low for wildflower producers, and as such they were generally not caught on an 'agricultural treadmill' whereby intensified production was necessary to service debt.

The implication of these factors is that, in relation to production intensity, the majority of wildflower producers would be positioned at the weak-to-moderately multifunctional end of the p/np spectrum.

7.2.6 DEGREE OF (ON-FARM) DIVERSIFICATION

The degree of diversification in an agricultural business assists in informing the position of producers on the p/np spectrum, although it is only one component of what multifunctionality is about, according to Wilson (2007). Diversification is indicated through the part-time status of half of the growers surveyed (signifying pluriactivity), and through information provided in relation to other income sources. Only two growers had no income other than that generated from wildflower production, suggesting that diversified income strategies were common among other growers. The majority of wildflower pickers did not have an alternative income stream, signifying weak multifunctionality on the part of pickers *in relation to this aspect* of the p/np situatedness assessment.

Mixed farming enterprises, with multiple, diversified streams of production and income, may have both weak and strong multifunctionality, depending upon the nature, drivers, scope and scale of each activity. This criterion needs to be interpreted on a case by case basis due to the "complex multifunctional pathway opportunities open to these farms" (Wilson 2007: 246). It is the combined, overall effect of the positions of farming enterprises on the p/np spectrum in relation to the many and various aspects of multifunctionality that defines the place of the producer on the p/np spectrum at any given point in time. The aggregation of the positions of

many producers on this spectrum may then provide an industry picture which illustrates the collective industry location with regard to multifunctionality.

Strong conclusions on this aspect of the assessment, for growers involved in diversified agriculture (as most were), cannot be simply drawn. However, when taking into account that weak multifunctionality exhibits the attribute of minimal diversification, and that only two growers identified no diversified income source, it can be suggested that a moderate or strong multifunctionality position on the p/np spectrum may be plausible for the majority of growers in relation to this factor.

7.2.7 PRODUCER AND COMMUNITY PERCEPTIONS OF THE ROLES OF AGRICULTURE AND OF THE CHANGES OCCURRING WITHIN AGRICULTURE AND RURAL AREAS

Producer perceptions

How producers see themselves has a significant impact on where they are located with regards to the multifunctionality spectrum, and on their decision-making processes.

Marsden (1998: 23) poses the question “how are commodity relations and values generated, and challenged, through the active strategising, network building and knowledge construction of particular producers, consumers and other relevant users of rural resources?” This question links directly to the issue of the impact of producers and consumers on rural change and the transition towards or away from multifunctionality. For producers actively engaging vertically along the supply chain, and keenly interested in maximising productivity, the ability to strengthen one’s own level of productivism and position at the productive end of the p/np spectrum is strong. Producers who see themselves as actors in a corporatised or commoditised agricultural system, and engage and act accordingly, will strengthen their embeddedness within a productivist system as well as their position as weakly multifunctional. In strengthening their positions in a productivist industry and through building stronger relationships in the vertical supply chain, producers can potentially influence the commodity relations of their product, and thus their economic returns.

Conversely, those who recognise lifestyle and family relations in their personal balance of productivism and non-productivism will tend towards being moderately or strongly multifunctional, and make decisions and build (horizontally integrated) relationships which reflect this stance. Where such producers see agriculture as having a stewardship function, or are influenced by trends towards the consumption of the countryside, for example, this will be reflected in the decisions they make, and thus in the position of themselves, and possibly their industry, on the p/np spectrum.

Consumer perceptions

According to Perkins (2006), new agricultural and horticultural products represent a class of commodity which denote

...economic changes emphasising the diversity of rural commodity production to serve largely urban markets with niche products catering for well-resourced consumers. The production of such commodities is ... underpinned by technological innovation, but more particularly is influenced by changes associated with consumer lifestyle, health and fashion. ...The key to high returns for such products revolves around branding and advertising strategies which combine desirable images of often exotic places and novel consumer goods, promising one or a combination of quality, social status, novel or stylish experience, the attainment of natural capital, and better health. (Perkins 2006: 248).

Consumer perceptions are fundamental to the production of non-essential commodities such as flowers and foliage. They have the potential to influence the positionality of producers on the multifunctional spectrum by 'voting with their wallets' against products which they feel may be, for example, produced in systems they deem unethical, or as having unsatisfactory externalities. Conversely, consumers may choose not to pay potentially higher prices for products perceived to be 'ethical' (for example, originating from organic-certified farms) as opposed to those produced under 'normal' production regimes. As such, consumers can influence the multifunctionality trajectories by causing producers to respond accordingly to demand.

Wilson (2007) argues that in a moderately multifunctional agricultural regime, society and consumers value both productivist and non-productivist agricultural

outcomes. This is evident in the commitment of both the Department of Agriculture and the South West Development Commission to invest in this research program as industry partners. These organisations, in principle at least, recognise the potentially beneficial non-productivist externalities of the wildflower industry, while supporting, at least in principle, agricultural income generation within the study area.

The question that will now be considered (in Chapter Eight) is how the positions of producers on the multifunctionality spectrum affect or inform their responses to perceived consumer demand for wildflower tourism in the South West and Great Southern regions. This will provide a sound understanding of why producers may have responded as they did (in a largely negative manner), and assist policy-makers by providing insights into those factors which play a strong role in the decisions made by wildflower producers in relation to diversifying into tourism opportunities.

7.4 CHAPTER SUMMARY

This chapter has addressed factors impacting upon the positioning of the southern wildflower industry producers on the p/np spectrum. However, it is vital that a warning provided by Wilson (2007), in relation to the ability of farms to shift between weak, moderate and strong multifunctionality on the p/np spectrum is noted:

...even farming systems that intuitively appear easy to categorise... may show elements of both productivism and non-productivism. The latter highlights the danger of broad generalisations and emphasises the need for case-by-case investigations of the positionality of agricultural actors/institutions/holdings along the multifunctionality spectrum. (Wilson 2007: 246)

Part of what this thesis is endeavouring to do is to consider, for a small-scale industry, whether the specific responses of producers which reflect their situatedness on the p/np spectrum can be extrapolated to provide an 'industry picture' which reflects multiple positions on the spectrum (albeit with a relatively small number of producers compared with other industries). This information can then enable a stronger appreciation of the responses given to questions regarding tourism diversification, and establish the groundwork for the development of sound policy which either supports or influences the positions of wildflower producers on

the subject of wildflower tourism in particular and on the development of the wildflower industry more generally.

Taking into account Wilson's (2007) warning about generalising, it is however possible to differentiate clearly the types of producers and their locations on the p/np spectrum at the time the research was undertaken. However, this is not to say that the location of any or all producers on the n/np spectrum is permanent. Producers may shift in either direction along the p/np spectrum, and any broader political economy or supply chain factors which may affect production decisions and industry development trajectories will influence their situatedness on the spectrum.

Finally, weak, moderate and strong multifunctionality are not mutually exclusive concepts in any one farming operation. Flexibility within the multifunctional (agricultural) spectrum, as evidenced through the ability of producers to transition along the spectrum, in either direction, is considered in Chapter Eight, in the context of a discussion of tourism opportunities which may or may not emerge depending on the situatedness of wildflower producers on this spectrum.

CHAPTER EIGHT – CHANGING PRODUCTION AND CONSUMPTION PATTERNS AND THEIR IMPLICATIONS FOR THE SOUTHERN WILDFLOWER INDUSTRY

8.0 CHAPTER OVERVIEW

This chapter initially considers the implications of the responses from producers and tourism operators to questions regarding potential wildflower tourism opportunities in the study area. Attention is given to the positions of producers on the productivist/post-productivist spectrum, in order to further understand the generally negative attitude towards (increased) wildflower tourism activity in the South West and Great Southern regions. The discussion addresses the reasons why, although rural tourism may provide opportunities to transform “a positive externality of multifunctionality into an income-generating opportunity (or the internalisation of an externality)” (Ohe 2007: 2), information provided by wildflower producers suggests that few, if any, have an inclination to enter into tourism-supply activity.

The discussion then turns to how, if at all, producer perceptions on tourism opportunities might be influenced. Section 8.2 considers whether changes to the intensities of relationships in the actor network, and to the situatedness of producers on the p/np spectrum, might lead to differing perceptions of wildflower tourism potential.

The third part of this chapter addresses changes to the State government’s forest policies, which have partly been driven by societal environmental demands, including demands to passively ‘consume’ forested rural environments through tourism. This discussion is necessary to provide an understanding the overall implications of consumption-driven rural change on the wildflower industry.

8.1 WILDFLOWER PRODUCERS, A PRODUCTIVIST ETHOS, AND THE IMPLICATIONS FOR TOURISM

“Tourism is often seen as the panacea for the ills of declining rural communities” (Walmsley 2003: 61; see also Jenkins 1993). Interest in tourism opportunities for the wildflower industry was likewise strongly expressed by one of the industry partners supporting this research program, and therefore its inclusion in the project.

The discussion provided in Chapter Seven considered multiple variables that influence a producer’s positionality on the productivist/non-productivist spectrum, while Chapter Five provided data to suggest that neither producers nor existing tourism operators believe that increased wildflower tourism would be beneficial to their personal businesses and/or lifestyles. As discussed in Chapter Six, the factors behind these beliefs include from a perception that demand is not sufficient to sustain future wildflower tourism businesses (as was also suggested by some tourism operators). Other factors include unwillingness on the part of many producers to ‘compromise’ the profitability and biosecurity of their production systems, or their time and lifestyle trade-offs, to expand their activities into tourism.

It should be noted that a differentiation between (on)-farm tourism and other forms of tourism in rural areas was not made when discussing these issues with producers. Some producers talked of tourism in relation to farm-stay accommodation and guided tours of cultivated crops, while others considered the term in relation to the local sale of product to tourists through retail outlets. The subject was thus generalised to reflect all forms of tourism in discussions, since the study participants did not, themselves, show either in-depth understanding of, or interest in, differentiated forms of tourism.

The multifunctionality assessment provided in Chapter Seven has suggested that the majority of producers exhibit moderate tendencies towards non-productivism and multifunctionality. Farm tourism *may* offer specific non-productivist alternatives to productivist farming trajectories (Wilson 2007), especially for women on farms (Alston 2005). Ohe (2003: 67) suggests that “health and recreational functions are the easiest among [farm] functions in a setting of multifunctionality to be internalised into rural tourism activity”. However, the negative responses from the majority of producers, in relation to tourism, reflected a preference for production-related diversification activity, rather than for diversifying into consumer-focused practices.

This factor was also evident in the number of wildflower producers who indicated that they have always farmed, and intend continuing to do so. For many of this group, this on-farm diversification is already evident from their entry into the wildflower industry.

This situation is not unique, with other researchers finding that farmers are more likely to diversify into production activities than consumption-related activities (such as tourism) (Hoggart and Paniagua 2001). In relation to *wine* tourism, common in the study regions (which contain, amongst others, the Margaret River, Great Southern and Blackwood Valley wine regions), Beames (2003) suggests that the focus of wine *producers* on wine *production*, means that “wine makers do not see themselves in the tourism industry, and that, while the extra sales from the cellar door may be welcome it is clear that many wineries feel that the tourism side of their business can be a distraction” (Beames 2003: 208). The conclusion may be drawn that should wildflower producers venture into tourism, there is a large risk based on their backgrounds in agricultural *production* and their disinterest in creating tourism activities, this situation may also emerge in this industry. Further research and comparison of wine and wildflower industry tourism in the study area may provide answers to why wine tourism is still significant in scale and scope across the region, notwithstanding Beames’ (2003) synopsis noted above.

This concept has been described as “entrenched productivist farmer selves” (Burton and Wilson 2006), whereby farmers (predictably) see themselves primarily as producers. In this circumstance, “any move towards post-productivist behaviour is likely to be underlain, at least in the short-medium term, by strong productivist identities that could rapidly become dominant again...” (Burton and Wilson 2006: 110).

Tourism is also seen by some wildflower growers as being linked to a reduction in farm production intensity “through the loss of one or more family members working for tourists instead of agricultural commodity production” (Wilson 2007: 108). However, there is also the possibility that on-farm tourism opportunities may attract family farm members and encourage the on-farm retention of family labour, thus potentially contributing to positive social or family outcomes.

Furthermore, as indicated by a number of producers interviewed in this study, the (limited) seasonality of wildflowers would not warrant the increased public liability

insurance, local government rate imposts and other additional costs that would apply year-round, for a seasonal tourism activity. These capital investment requirements for tourism may thus be a hindrance to achieving wildflower tourism potential within the study area.

In addition, it has been suggested that farm tourism

...is not a good business for all. Records from different countries show poor turnover and negligible revenue... It seems clear that farm tourism would not have existed as an organised form without the back-up of interest groups.
Nilsson (2002: 21)

While Nilsson's finding will not be universally accepted, especially amongst pro-tourism groups, it does indicate the presence of a real financial risk alongside of Wilson's acknowledgement of the risks to other farm activities through the redirection of family (or staff) labour to tourism-related activities where this is done to the detriment of other on-farm work.

Compounding these arguments, it has been contended that "achieving strong multifunctionality at a rural community level is predicated on the need to achieve critical mass to build up and sustain a 'multifunctional reputation' for the area for external customers (for example, tourists)" (Belletti et al. 2003, cited in Wilson 2007: 259). Without significant tourism industry interest from wildflower producers (and thus the ability to achieve critical mass), and since these areas lack the level of the roadside appeal of wildflowers that is present in drier regions such as the Mid-west and Goldfields regions of Western Australia, the opportunities for significant wildflower tourism development in the South West and Great Southern regions seem very slim. However, viewed in conjunction with existing tourism developments within the study area – for example, those offered by the wine tourism industry – there may already be potential to add value to experiences to the consumer visiting the region, should some wildflower producers choose to do so.

Critical mass, in this circumstance, could be achieved through the interaction of complementary tourism activities across a geographic area – in this case, the South West and Great Southern regions. The Government of Western Australia injected A\$2.25 billion into tourism infrastructure during the 2002-03 financial year (Western Australian Tourism Commission 2003), suggesting a strong public sector

commitment to achieving this critical mass. Tourism Western Australia (2008) figures for the period 2000 to 2007 show, on average, approximately two million domestic visitors to Australia's South West¹ per annum over this period. Interestingly, in the three years immediately following this research project, domestic visitors to the South West exceeded those visiting Western Australia from interstate and overseas, indicating significant internal (State) demand for a broad array of tourism experiences. Both during and since this period, environmental and nature-based tourism experiences have been a strategic focus of the Western Australian Tourism Commission (now Tourism Western Australia).

Thus it appears that while wildflower producers were generally nonchalant about or dismissive of tourism opportunities, broader strategic directions and tourism trends were indicating strong tourist preferences for the South West and Great Southern regions. Region-wide investment in tourism may have been strong during the study period, but it was nonetheless insufficient to encourage the majority of wildflower producers to enter into tourism activity.

While the 'supply' perspective offered by wildflower producers must be considered against the State effort towards achieving critical tourism supply mass, the consumer 'demand' perspective for southern wildflower tourism also needs to be considered. In this research project, indirect information on wildflower tourism demand was provided by existing industry operators. Again, as described in earlier chapters, their views tended towards negativity from businesses operating tourist activities, but towards positivity from those servicing demand through local tourist information centres.

However, specific, localised options for wildflower tourism may exist. Glover and Prideaux (2009) suggest that the ageing 'baby boomer' population (that is, those born between 1946 and 1965) in Australia will have a strong impact upon the trajectories of tourism activities and destinations. Baby boomers, according to the authors, are more inclined to undertake overseas travel or more active tourism pursuits (such as hiking). This generation differs from previous generations (whom tourism operators identified as a significant proportion of their clientele – see Figure

¹ During 2002-2003, the Western Australian Tourism Commission redefined its promotional regions, with "Australia's South West" being the geographic comprised of the South West and Great Southern regions – that is, the area covered by this research project. (Western Australian Tourism Commission 2003)

5.23), who have traditionally engaged in passive retirement tourism pursuits, such as wildflower tours. The implication of this for wildflower tourism lies in a need for future tourism ventures to consider active tourism opportunities – whereas traditional wildflower tourism, such as bus charters, can be described as passive. Furthermore, the baby boomer generation is also more likely than previous older generations to travel overseas for tourism activity (Glover and Prideaux 2009). As a result, the wildflower tourism market faces significantly more competition than may have been previously experienced, and needs to adapt accordingly by establishing either active tourism pursuits, or marketing arrangements to attract tourists who diverge from the former ageing tourist demographic associated with wildflower viewing. This is likely to be the case for domestic tourists, and may also be relevant for mobile and active ageing international tourists. These issues support the concerns of many tourism operators participating in the research, that increased demand for wildflower tourism in the study region is unlikely and, as such, unlikely to sustain additional wildflower tourism businesses.

Walmsley (2003: 70) suggests that the challenge to regional Australia (to attract tourism income) is to market the post-rural “in such a way as to attract visitors.” For the wildflower production industry, this opportunity does not clearly exist given the attitudes of the current set of producers and the nature of existing tourism operations. Put simply, cultivated rows of wildflowers do not necessarily offer the modern tourist a significant experience. This fundamental issue further contributes to the attitudes of producers towards tourism.

8.2 WILL PRODUCERS’ POSITIONS ON TOURISM CHANGE?

The discussion in Section 8.1 suggests the following factors affect the position of the southern wildflower industry in relation to tourism:

- Wildflower producers see themselves as *producers*, not suppliers of consumption demands. Tourists are perceived to present challenges which producers are reluctant to address.
- Cultivated wildflowers are not seen by producers as presenting many direct, attractive tourism opportunities, and significant time and effort would be required to shift grower activities to make them attractive to tourists.

- Changing tourism demographics will require that tourism ventures in the future will need to meet the needs of a fitter, more educated, more travelled market with *active* tourism demands, in order to obtain market share and be viable. (This aligns with Glover and Prideaux's (2009) reflections on attracting the 'baby boomer' market. Cultivated rows of wildflowers *could* provide opportunities herewith although, as many producers observed, this may conflict with their existing farming operations).

This thesis has utilised actor-network analysis and the positionality of producers on the multifunctionality spectrum to endeavour to understand their situatedness in the industry, given changing production and consumption trends in the rural sphere. To analyse whether producers' positions on tourism are likely to change, there is value in considering how producer opinions are influenced by their networks and how these may shift in relation to their endogenous and exogenous pressures and drivers.

Changes to the depths of relationships in the actor-network may influence the position of producers not only on the productivism/non-productivism spectrum, but also with regard to their personal interest in tourism and other multifunctionality opportunities. The actor-network diagram presented in Figure 5.20, and the resultant discussion on the relationships provided in Table 6.2, suggests that for many, especially smaller, producers their relationships with the wholesalers/exporters were very strong. Interviews with producers and wholesalers suggested that this relationship had a strong exogenous influence on the wildflower business operation, being the first link in the supply chain, and the one to which producers had the most association, particularly in relation to sourcing agronomic and marketing advice. Wholesalers/exporters therefore have the potential ability to influence producers in any direction. Wholesalers/exporters could potentially be utilised by policy-makers or others to influence decision-making by producers, where direct attempts to influence producers have not been successful. This is particularly so in relation to changing forest policy and the wildflower pickers (see Section 8.3), whereby wholesalers/exporters could support policy-makers through the diffusion of industry policy information to their suppliers.

With regard to tourism, although it is possible that wholesalers/exporters have the capacity to influence the thought processes of producers, it is considered unlikely that they would do so unless they perceived economic benefits for themselves from

such an initiative. Given the relatively insignificant level of local demand for their suppliers' product, this would seem to be unlikely.

Other actors and entities directly influencing the producers' decision-making include their families and lifestyle and health considerations. These form powerful elements of the multifunctionality assessment considerations discussed in Chapter Seven, and are reflected in the positionality of a producer along the p/np spectrum at any time.

Productivist and non-productivist tendencies present within a farm decision-making arrangement

The wildflower industry participants involved in this study fundamentally see themselves as producers, though there are some indications towards non-productivist tendencies, including environmental concern and some slight interest in tourism opportunities (or at least the identification of where tourism opportunities might exist 'for someone else'). However, the stronger tendency with this set of producers is towards productivism and thus, while they may individually shift along the p/np spectrum with respect to individual endogenous decision-making factors, there does not appear to be sufficient producer interest in diversifying into tourism. No clear opportunities for changing this status are evident from the analysis provided in Section 7.2.1.

Degree of environmental stability

Changing producer attitudes regarding farm environmental stability have some potential to shift their perceptions of tourism, if producers see tourism as less environmentally damaging than their usual production activities and change their behaviour accordingly. However, with tourism being fundamentally about consumption, arguments suggesting the non-environmental sustainability of travel and tourism could counteract these perceptions.

Embeddedness of farm activity into the local community

Opportunities for increasing wildflower tourism in relation to this factor of multifunctionality may emerge if other (wildflower) tourism activities develop within local communities, or where local communities and networks grasp tourism as a local goal. This factor relates, at a local scale, to the 'critical mass' discussion

provided earlier. For many parts of the South West and Great Southern, particularly those within commuting distance of major urban areas, the embeddedness of tourism activity at the local level may already be influencing other community members to enter tourism.

Achieving perception change at this level is subject to the producer firstly being embedded in the local community in order to be able to be influenced by change at that level, and secondly expressing non-productivist tendencies or shifting preferences for servicing consumption demands over production.

Length of supply chain

A shorter supply chain, indicating strong(er) multifunctionality, may increase producer interest in entering tourism activity, where producers are more closely aligned to market demand and consumer product expectations. If this occurs, and producers directly witness tourism consumption demand at the local level, it may encourage producers to enter into tourism activity.

Farm production intensity

As discussed earlier, producers focused on intensive production (thus indicating weak multifunctionality), are likely to be disinclined towards tourism. More extensive production, such as the harvesting of wildflowers from private stands of native vegetation (that is, private bushpicking rather than cultivation practices), may result in more time availability to enter tourism, subject to the other factors affecting producer decision-making.

Degree of on-farm diversification

For producers who have diversified into consumption-related activities, entering into tourism may not be a difficult decision. However, the growers in this study predominantly indicated that wildflower production was another production activity in addition to other farming, and remained positioned towards the productivist end of the p/np spectrum with regards to this factor.

Producer and community perceptions of agriculture and change occurring within agriculture and rural areas

Producers who see agriculture and thus rural areas as sites of production are likely to remain disinclined to enter consumption-based activities such as tourism. However, where producers experience, acknowledge and appreciate the trend towards the consumption of the countryside, a shift along the multifunctionality spectrum is possible. Furthermore, where such producers see economic potential from changing rural scenarios, tourism opportunities may be identified and possibly pursued.

Section 8.2 Summary

This section has endeavoured to utilise the multifunctionality and actor-network analyses undertaken on the wildflower industry to identify where there might be opportunities to influence otherwise reluctant producers towards a stronger interest in wildflower tourism. However, the fundamental issue, as described earlier, is that wildflower industry participants see themselves as producers and not as suppliers of consumption demand. The set of producers present in the industry during the study period were unlikely to venture into tourism activity or other non-productivist diversification options unless significant personal or economic changes occurred.

8.3 CHANGING COMMUNITY EXPECTATIONS, FOREST POLICY, AND THE WILDFLOWER INDUSTRY

The contribution of State Forest or Crown Land in Western Australia to wildflower exports, via 'bushpicked' wildflower and foliage product, is significant, and therefore the implications of changing societal values upon forest policy, and upon the picker's ability to source flowers from State Forest, must be considered. Linkages can be drawn to tourism trends within the study area, as part of an overall social affinity with forests and the rural idyll, and the consumption of rural environments.

Specifically, the relationship between changing forest policy and the wildflower industry directly affects the role and income of wildflower pickers, and indirectly affects growers via the impacts on export volumes and market presence.

Changing forest policy in Western Australia in the 1990s and 2000s has its roots in both science-based environmentalism and community concern for the conservation of nature, and, to a lesser degree, in the commoditisation of in-situ forest resources – including the demand for recreation and tourism (Conservation Commission of Western Australia 2003). The *Regional Forest Agreement for the South-West Forest Region of Western Australia* (The Commonwealth of Australia and The State of Western Australia 1999) established a framework for managing State Forests in the study area in a sustainable manner. The Regional Forest Agreement (RFA) area included the forests of the South West and Great Southern regions, but not the entirety of the land mass of those regions (given that neither is entirely forested). Importantly, the RFA area covered the forests of the Manjimup, Denmark and Walpole areas, where the majority of pickers are located and operate.

The primary driver for the establishment of the RFA was changing community perceptions of environmental sustainability in relation to forest management – and specifically, to the production of timber from native forests. An element of the framework included agreement by the parties to facilitate industry development in relation to tourism and recreation (The Commonwealth of Australia and The State of Western Australia 1999: Section 73(d)). In relation to ‘other,’ non-timber production forest uses, such as wildflower and foliage picking, the Agreement states that Western Australian legislation will determine the status of other uses “with due regard for protection of environmental and heritage values” (The Commonwealth of Australia and The State of Western Australia 1999: Section 84).

Tourism assessment was an integral part of the RFA process, given that forests were considered to be “an important drawcard to leisure-based tourism and recreation, and form a significant part of the nature-based package that the State of Western Australia has to offer” (Joint Commonwealth and Western Australian Regional Forest Agreement (RFA) Steering Committee 1998: vii). Tourism facility development to the value of \$17.5 million was committed as part of this Agreement (Department of Conservation and Land Management undated). This investment resulted from the expectation that visitor trips to forests in the RFA area were anticipated to increase from 812,500 in 1996 to between 1.28 million and 1.33 million by 2018 (Joint Commonwealth and Western Australian Regional Forest Agreement (RFA) Steering Committee 1998), although it should be noted that some of these tourists will visit non-South West or Great Southern forest areas, due to the

slightly broader scope of the RFA (which includes the Swan Forest Region, adjacent to Perth).

In relation to the picking of wildflowers from public land, the RFA resulted in the establishment of conservation reserves for land previously classified as State Forest or timber reserve. This land is that which bushpickers accessed for foliage and flower harvesting. At the time of the research, pickers were very uncertain about the implications of the RFA upon their livelihoods, given that, once forest blocks are declared 'Reserve', they are no longer open for flower and foliage harvesting.

Associated with the RFA is the *Forest Management Plan 2004-2013* (FMP) (Conservation Commission of Western Australia 2003). The FMP was being developed at the time of the research, with many pickers again expressing the uncertainty noted above about the impact of the FMP on their income (and on the lifestyles enabled by their picking industry involvement).

Pickers maintained that their activities in State Forests were largely environmentally benign and self-managed (in their own interest, in order to remain sustainable, as well as due to government regulation and monitoring). However, at the time of the research, pickers did not indicate the existence of an organised, singular voice for their industry, although at least one wholesaler/exporter was strongly arguing the case for wildflower picking with policy makers.

In relation to the situatedness of pickers on the multifunctionality (p/np) spectrum, the majority could be considered to be moderately multifunctional, with productivism the underlying driver (evident from the large proportion of pickers who are self-declared full-time professionals with no other income source and a desire to earn more income). Yet this productivism was tempered by the perception, held by many pickers, that they contribute to sustainable forest use through the (environmental) quality controls they practiced individually, such as picking only limited proportions of individual plants and limiting the numbers of plants harvested within a forest block.

Regardless, however, of the pickers' personal perceptions, positions and desires as indicated in this thesis, forest policy changes threatened to have a severe impact upon their role in the industry, and upon the position of Western Australian-produced wildflowers on international export markets. The threatened policy changes and

forest access implications, however, potentially provide growers (and also tourism operators), with opportunities for expansion – should they desire to seize the opportunities.

The overall implication of changing forest policies on the wildflower industry in southern Western Australia is summarised in Figure 8.1:

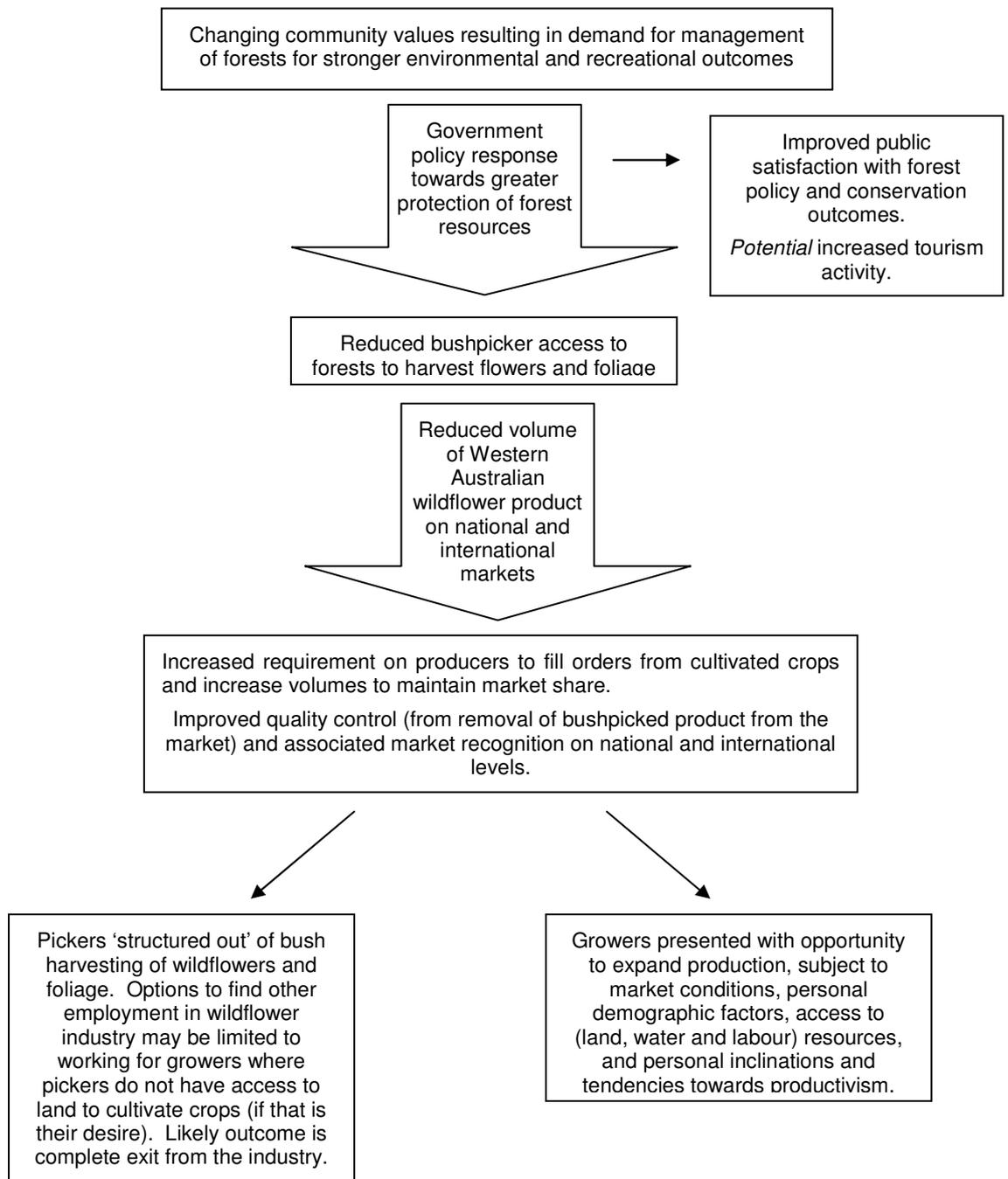


Figure 8.1 Implications of changing forest policy for the southern wildflower industry

Further information on changes which have occurred in the wildflower industry since the research period (2001-2003) are summarised in the post-script following Chapter Ten.

8.4 CHAPTER SUMMARY

This chapter has addressed the direct relationships between the wildflower industry, consumption values, tourism and changing forest policy respectively. The chapter findings are that wildflower growers, with backgrounds in agriculture and with preferences for production over consumption-serving activities, will be inclined to remain indifferent to wildflower tourism opportunities. While a paradigm shift towards rural tourist servicing may be occurring around wildflower producers in the study area, and a critical mass of tourism activity may be emerging, this may not be enough in itself to encourage the set of producers involved in this research to shift towards tourism. Specific opportunities for influencing producers, based on the findings of the actor-network analysis, have been suggested.

Changing forest policies in Western Australia, and their impacts upon the wildflower industry, have also been discussed in Chapter Eight. The purpose of this discourse is to address, from an alternate perspective, the influence and impacts of changing societal values towards both environmental protection and the consumption of the rural idyll in a developed world context.

CHAPTER NINE – POLICY IMPLICATIONS AND RECOMMENDATIONS

9.0 CHAPTER OVERVIEW

How can policy-makers address the complexities of a small-scale agricultural industry in considering and developing policy for beneficial multifunctional rural outcomes and sustainable regional development? This thesis has suggested that multifunctionality assessment may assist in *understanding* individual producer perspectives in relation to their farming activities and to their interest (or otherwise) in diversifying into related agricultural or non-agricultural activities. This approach to understanding agency may inform policy for developing small rural industries in contemporary Australia. It may also complement structural policy at broader levels, such as in relation to agricultural exports or, in the case of the wildflower industry, forest management policy.

This chapter takes into account the suggestion from Wilson (2008b) that, in considering both agency and structural influences upon farming and rural decision-making:

Each region and agricultural community will have different governance structures with differing opportunities for policy to act as a trigger for strong multifunctionality. The solution for finding the best pathway towards strong multifunctionality will be to accept that different governance structures exist, and that not one specific transitional strategy can be developed that would suit all multi-layered actor spaces and power structures. (Wilson 2008b: 19).

Wilson's approach to multifunctionality (Wilson 2001; 2007; 2008a; 2008b) is considered to provide a useful assessment framework, but it is applied in this study from a neutral or non-judgmental perspective. Wilson's philosophical stance, whereby 'strong' multifunctionality is considered *morally superior*¹ and the main goal for rural policy development, is not necessarily in tune with the responses from wildflower industry participants. As such, the recommendations in this chapter are

¹ Wilson's argument for strong multifunctionality is discussed in Section 2.3.4.

made from a neutral perspective, which does not choose either productivism or non-productivism as the ultimate goal. Instead, the goal here is to assess the research findings presented in the preceding chapters in relation to the more amorphous concept of improved 'regional development' in a rural area. Regional development will be driven by and will impact upon both productivist and non-productivist stakeholders, and may be expected to deliver moderate but potentially increasable levels of multifunctionality within the study area. Through this approach, policies to facilitate both productivist and non-productivist goals may be developed and applied simultaneously, enabling producers to choose their preferred trajectories. The aim is to encourage regional development outcomes that suit both the industry participants, and the broader goals of society – including environmental and social outcomes for rural areas.

This concept of simultaneous approaches to diverse economic outcomes is not new to rural policy. Potter (2006: 195) suggests that policy-makers "are signalling acceptance of the idea that a productivist agriculture will exist side by side with some sort of alternative consumption countryside". In the Australian context, Anderson (2000) suggests close scrutiny of instruments for 'non-trade concerns', including re-training and structural adjustment packages, to address non-production goals for rural areas. More recently, Cocklin *et al* (2006) and Dibden and Cocklin (2009), amongst others, have identified signals of a shift towards

... 'multifunctional-type' policies which recognise the value of other aspects of a farmer's activities other than production – particularly environmental work – and also the contribution of farming to rural community viability. (Dibden and Cocklin 2009: 165)

Programs aimed at encouraging environmental stewardship in rural Australia provide examples of multifunctional-type policies which cover the 'middle ground' between 'neo-liberal productivism' and 'state interventionism' (Cocklin *et al.* 2006). These authors suggest that the sustainability-oriented rural development model of multifunctionality observed by Potter (2006) and others including Marsden and Sonnino (2005) has the potential to accommodate rather than challenge market rule. This capacity emerges from the implementation of simultaneous policies designed to achieve ecological, social and economic goals.

This chapter seeks to add value to current debate by suggesting policy options at a regional development scale for achieving the economic, social and ecological sustainability goals espoused by wildflower industry participants and/or desired by the agencies investing in this research. Policy suggestions for fostering wildflower productivity improvements and rural and farm tourism are made. The chapter concludes with recommendations for future research as a result of this study.

9.1 POLICY IMPLICATIONS FOR WILDFLOWER INDUSTRY

DEVELOPMENT

Objective IV of this thesis aimed to “contribute to recommendations for the development of strategies to strengthen the wildflower industry within the regional economy, with a particular focus on any emerging tourism opportunities”. This assumes productivist outcomes, but it can also indicate other attributes such as strengthened business arrangements within local networks, improved regional employment, and potentially also environmental objectives.

From a regional perspective, policy which increases the contribution of an industry to positive economic, social and environmental outcomes may be considered to be desirable. While it is likely to suggest elements of multifunctionality, the difference between this viewpoint and Wilson’s (2007) multifunctionality perspective is that this argument does not exclude productivism as a desirable outcome.

It is clear from the multifunctionality assessment and the actor-network analysis that local wildflower production is affected by both structure and agency. Policy measures aimed at influencing agency – for example, by influencing farm-level decision-making trajectories – could utilise actors in the network from whom producers might seek advice. The clear example here is through wholesalers and exporters. Strengthening local networks, between producers, may also assist in influencing the ability of these actors to participate at a more (or less, depending on the objective) productive level within the industry. Murdoch (2000) suggests a dual role for the state in supporting industry, with both a “rather traditional development role while seeking to strengthen the networking capacities of such areas” (Murdoch 2000: 416).

Wildflower industry policy-makers could also benefit from utilising the existing wealth of knowledge available on the wine industry, and wine tourism, in the South West

and Great Southern Regions. Comparisons with various studies relating to the wine industry could provide a guide for future industry development, and advice regarding potential risks and pitfalls, whether or not the proposed developments are tourism-related. For example, research by the Department of Training and Employment (1999a) suggested that the ability of the WA Wine Industry to grow and maintain product quality depends on the management expertise of operators, the availability of skilled workers, and a need for significant investment in storage capacity, expanded processing facilities and appropriate product transport. These issues align with many of those raised by wildflower producers during the research program. Industry comparisons would also provide an opportunity for Wilson's (2007) qualitative multifunctionality assessment approach to be tested at a larger industry scale.

A warning to policy-makers is also provided. At the outset of this research, an assumption was made that the wildflower industry may be expanding, but research evidence suggests that the producers themselves were not willing to expand their operations. In terms of regional development outcomes, overcoming the 'cottage industry mentality' of a large proportion of industry participants therefore needs to be addressed with targeted policies if there is an intention, by state agricultural development agencies, to shift this set of producers towards increased productivism. An alternative strategy may be to focus on those who are keen to expand, and assist with extension advice as necessary.

For those within this 'cottage industry' classification who are comfortable and satisfied with operating at a small and/or local scale, regional development agencies may be wise to encourage more sustainable practices, but not necessarily a shift in either direction along the productivism/non-productivism spectrum. For example, in relation to biosecurity concerns, agencies focused on industry development could also provide (limited) advice to small-scale producers on quarantine and related issues, in order to minimise quarantine threats to the larger, productivist wildflower enterprises which may be the focus of agency efforts. These activities could simultaneously occur within a broader neo-liberal political economy with its focus on free trade, as per the current Australian context.

Similarly, within the broader forest management arrangements applied in Western Australia, the apparent expertise of wildflower pickers in the environmental management of forest resources, resulting from an average of nine years' on-ground

work in State Forests, could be sought and utilised. Numerous options exist for policy-makers to access such knowledge and to integrate it within other aspects of rural development, such as by efforts to cultivate endemic species for commercial production, or into the management of nature-based tourism activities and impacts. Multiple objectives, including the securing of ecological knowledge and the maintenance of local communities through the re-employment of pickers, could be achieved. However, at the scale of the wildflower industry in the study area, it is considered unlikely that governments will see significant merit in the channelling of limited (forest) industry restructuring and regional development resources into such a small industry.

9.2 POLICY IMPLICATIONS FOR RURAL, FARM AND NATURE-BASED TOURISM

Rural and farm tourism

Ohe (2003) argues that, (in the context of the traditional European Union-Central Agricultural Policy (EU-CAP) approach to the subsidisation of externalities) “promoting rural tourism has an effect on integrating farming policy and rural policy in an efficient way, which is the significance of rural tourism for policy planning” (Ohe 2003: 67). However, while this may be so in situations where externalities are indeed subsidised, in the broad Australian political economy context, the option to fund promotional activities to encourage entry into the rural tourism market as an alternative to direct subsidies does not exist. As such, any policy efforts and/or promotional investment by government or industry organisations cannot readily be traded off as an alternative to other investments. The implication of this is that, should policy-makers decide to promote or invest in the wildflower tourism industry development in the study region, funds to do so could not be easily leveraged from another source aimed at the same or similar outcomes, as might be the case in countries where multifunctionality initiatives are formally subsidised.

Furthermore, there is a need to address the demands of a changing tourist market – and in particular, the ‘baby boomers’, who are now entering the senior age groups which have traditionally supported wildflower tourism in Western Australia. The needs of this market must be assessed and tourism products developed accordingly.

Wildflower tourism development policies should address the need to obtain a critical mass of participants in order to compete with other regions such as the Mid-west and Goldfields. This could prove difficult, given that much of the wildflower appeal of competitor regions lies in the natural occurrence of wildflowers which grow in harsher climatic and landscape conditions than those evident across much of the study area. This may be particularly so in forested areas with access challenges – especially for elderly tourists.

Policy-makers and potential wildflower tourism businesses can take advice from specific suggestions for maximising regional tourism made by Sorenson and Epps (2003), in relation to research undertaken in Central Western Queensland. The authors suggest benefits can be obtained by:

- 1) developing a greater and more diverse pool of attractions and events;
- 2) extending the tourist season;
- 3) packaging and marketing the region;
- 4) creating a wider range of accommodation; and
- 5) becoming part of an integrated State tourism development plan”

(Sorenson and Epps 2003: 88)

This relates to the need to reach a critical mass in order to maximise wildflower tourism opportunities (which, this study argues, is unlikely if the set of producers involved in this research are seen as the primary providers of tourism product). The results of this research concur with the findings of Sorenson and Epps that achieving these aims “requires strong regional leadership and... considerable culture shifting among the local and often apathetic or sceptical communities, many of whom have only grudgingly tolerated the influx of tourists” (Sorenson and Epps 2003: 88). As is the case for the southern wildflower industry, these authors recognise that the suggested level of leadership did not exist in their study area.

As noted in Chapter Two, research into wine tourism in Western Australia was conducted in a study region close to and/or overlapping that of this research program. It concluded that the development of a strong regional focus and associated marketing would benefit wine tourism. The acknowledgement and

recognition of wine tourism operations by wineries (including cooperation in promotions and a strong customer focus) and staff development in relation to servicing customer needs, were all seen to be potentially beneficial (Department of Training and Employment 1999a). Furthermore, this work suggests that “Regional, State and national tourism bodies have similar and complementary wine tourism strategies to co-ordinate their activities” (Department of Training and Employment 1999a: 3). These findings provide useful guidance for wildflower tourism development. A coordinated promotional approach across regional, state and national levels of activity is essential if any tourism businesses which may develop are to obtain maximum benefit from tourist expenditure. Beames (2003: 212) adds to this argument by concluding that, at a local level, “wine bodies, tourism bodies and local councils need to address the provision of infrastructure and activities in order to give tourists a broader holiday experience and extend the length of stay and the value of the holiday spend.” Thus, policies to develop wildflower tourism, should the choice be made to progress in this direction, need to be comprehensive and unified across multiple sectors and scales related to the wildflower industry, in order to achieve a viable market presence.

Furthermore:

To date, rural tourism promotion has been viewed as a reactive strategy designed to diversify cash flows. A proactive approach that recognises the salience of leisure, recreation and tourism in a lifestyle-led consumption-oriented society presents considerable potential for enhancing the well-being of communities in rural Australia, particularly those within day-trip travel of metropolitan centres and those able to identify and fill a niche in the leisure, recreation and tourism market. (Walmsley 2003: 70)

Thus, policies and strategies aimed at improving the place of tourism within the regional economy need to consider both supply and demand factors.

However, there is also a strong argument that tourism opportunities should not be facilitated by government agencies unless the tourism demand is already there, in which case it is probable that at least some industry development would be happening without the assistance of government. Sorenson (1993) argues that tourism research and development funding should be the responsibility of industry,

and that government assistance should be limited to international or interstate destination promotion.

The evidence from this research indicates that investment aimed at encouraging *this present set of producers* into tourism is unlikely to work. This is because the industry is comprised largely of participants who seeing themselves primarily as producers, and not as servers of a consumer demand for their place and their practices.

Nature-based tourism

In relation to nature-based (in this case, forest) tourism and wildflower picking, policies aimed at maximising regional development through generating tourism revenue will, and have had, a negative impact upon the wildflower industry. The transfer of State Forest blocks to National Park (or other conservation reserve) status necessarily excludes commercial harvesting practices – including picking. Whether there is a (scientific) ecological sustainability argument to exclude picking from these reserves is secondary to the overall policy decision to exclude commercial harvesting activity.

In the forested areas of the South West and Great Southern regions where commercial harvesting has been progressively restricted in the past decade, there has been a simultaneous increase in nature-based tourism activity. In 2004-05, for example, CALM increased its areas of conservation reserves (including National Parks) in Western Australia by over 500,000 hectares (Department of Conservation and Land Management 2005), in line with the 'Protecting our Old Growth Forests Policy' of the State government. This effectively removed large blocks from the areas available for the harvesting of flowers and foliage from State Forest. (Simultaneously, the number of Commercial Purposes licences for the harvesting of wildflowers in Western Australia decreased by 30% between 2001-02 and 2007-08, although this may have occurred due to other factors, including the recent economic 'boom' in the State, which provided numerous alternative employment options for unskilled labour).

Research into the economic value of recreation and tourism in the Southern Forest Region estimated that *\$62M in direct tourist expenditure could be attributed to the presence of national parks and forests*. The authors found that this equated to

between 10% and 14% of the total tourism income generated in the South West Region (Carlsen and Wood 2004). These values, while not directly competing with income generated from wildflower production from natural sources, indicate the relative value of nature-based tourism as compared with that of bushpicked flowers and foliage from southern forests.

This scenario indicates that policy decisions made by authorities need to take into account the broader community social and environmental values which, in this case, also indicated a significantly higher revenue return – and potentially, positive triple-bottom-line outcomes. However, the implications for the *wildflower industry*, in this instance, were negative, with both the number of pickers and industry value declining in recent years. The trade-off which has occurred in this situation, albeit within a broader forest management context (driven by changes to Old Growth Forest logging policies), has resulted in a negative impact on the wildflower industry, but a more positive impact on regional development through increased tourism income and activity.

(Further information on changes occurring within the wildflower industry since the completion of the research is provided in the post-script to this thesis).

9.3 RECOMMENDATIONS FOR FUTURE RESEARCH

A number of future research opportunities have become apparent as a result of this study.

Wilson's (2007) approach to multifunctionality has provided a useful framework for considering the position of wildflower producers in relation to endogenous influences over their situatedness on the productivism/non-productivism spectrum. However, it would be desirable to apply this approach to a larger agricultural industry in order to test its utility at other scales. Specifically in relation to the southern wildflower industry, applying the multifunctionality assessment to the southern wine industry may provide lessons for direct comparison with wildflower industry trajectories, as well as testing the approach on an industry at a somewhat larger scale and with an established tourism/consumption component.

Further research directly into tourist desires (that is, tourism research from the consumption perspective) with regard to wildflowers in the study area may shed

additional light on *actual demand*. This may differ from the *perceptions of demand* currently held by producers and the opinions on demand by existing wildflower operators (who may have responded cautiously to questions regarding future opportunities in order to protect their own competitive advantages). A demand-analysis was beyond the scope of this study, but would add value to the understanding of future wildflower tourism opportunities. An analysis and evaluation of 'baby-boomer' and other demographic group tourism demands could also assist in furthering the understanding of future opportunities.

Wilson (2007) argues strongly that conceptualisations about multifunctionality in agriculture are based on moral judgments about what constitutes a better or worse agricultural regime, and he maintains that the ultimate aim should be for a shift towards strong multifunctionality, which he sees as stable. An extension of this concept relates to a holistic notion of sustainability, which takes into account economic, social, cultural and environmental factors. A sustainability assessment of the wildflower industry in southern Western Australia could readily utilise the seven broad assessment factors used in Section 7.2 to consider how sustainable this industry may be. This would ensure that local and global political, cultural, environmental/ecological, social, personal, economic, health and lifestyle aspirations could be taken into account in considering future industry trajectories.

An additional future research opportunity lies in an assessment of the impact of changing forest policy in southern Western Australia, both directly upon the wildflower pickers identified in this study (industry-wide, if a personal level approach is not plausible), and indirectly through changes to the volume and variety of wildflower exports from Western Australia. Such research would identify the outcomes of the structural policies which have gradually reduced the number of forest blocks, the number of pickers and the volumes picked in the study area (refer to the thesis post-script for detail on the actual changes that have occurred since the completion of the empirical research). Many wildflower growers were adamant that pickers undermined the industry by harvesting an inferior quality product and reducing overall returns when products were 'bulked up'. An assessment of this contention may add value to future wildflower industry development strategies and forest management policies in Western Australia.

9.4 CHAPTER SUMMARY

Policies for the development of the wildflower industry in southern Western Australia, and for the development of tourism opportunities to be provided by that industry, need to recognise that productivism is still dominant in the mentality of most wildflower producers. That is, production remains the strongest driver at a local or on-farm level, based on the backgrounds, current activities and aspirations expressed by producers in the study. This entrenchment of productivist tendencies will affect the success rate of any policies aimed at encouraging 'other' rural activities for farmers involved in wildflower production in the study area.

While this chapter has made suggestions for tourism development policies, it remains unlikely that the set of producers involved in this research, and others who may diversify into any niche agricultural industry, would be strongly in favour of a consumer-driven activity such as tourism if those producers originate from agricultural production backgrounds and see their roles as being production-oriented.

CHAPTER TEN – CONCLUSION

This thesis has provided a review of the wildflower industry, and its participants, in the South West and Great Southern regions of Western Australia, within the context of rural change. It has examined the backgrounds, motivations and network relations occurring within the industry in the study area, and concludes that, for the majority of participants, productivity remains the fundamental driver. While many producers acknowledge broader community trends towards the consumption of ‘the rural’, including through tourism, they do not themselves express a desire to enter into the direct servicing of consumer demands. Any policy initiatives aimed at influencing wildflower industry growth need to be cognisant of this factor.

However, in addition to these slightly dominant productivist drivers, the majority of industry participants indicated personal influences that can clearly be demarcated as non-productivist. Predominantly, these influences upon their decision-making included drivers such as balancing work, family and lifestyle ideals; a personal preference for Australian plants, in natural and/or commercial settings; and the existence of personal environmental values including a perception of the comparative sustainability of producing native species over imported varieties. As such, for the producers in this study, economic, social and environmental values were integrated to underpin their industry participation decisions, although economic factors largely remained the strongest drivers.

The inductive, or theory-generating, approach taken throughout the research program assisted in reaching these findings. Initial assumptions, such as the likelihood of a strong urban to rural migration presence in the industry, were discounted early, enabling the focus to shift towards drivers of change which were occurring within a fundamentally rural cohort.

At the time of the initiation of this research, rural geographers, sociologists and other analysts were questioning the discourses surrounding the emergence of a ‘post-productivist transition’ (which naively suggests that productivism will ‘end’ as ‘post-productivism emerges’). By the time this thesis neared completion, the academic discourse had shifted to a consideration of multifunctionality in rural and agricultural areas which had supplanted the post-productivist debate. The latter discourse had suggested that productivist and non-productivist activities could occur

simultaneously and that there could be multiple trajectories between the two. This provided a useful framework to assist in explaining the stances taken by producers on a number of issues, including, and perhaps especially, their perspectives on their possible involvement in tourism.

As part of this approach, this study has utilised actor-network analysis to identify and analyse the power relationships that exist within the wildflower industry and to consider their wider implications for regional development and policy. It has considered within this network analysis how macro-level (structural) factors, and endogenous (agency) relationships at the individual producer level can potentially impact upon business and industry trajectories along the productivist/non-productivist continuum. This research has paid attention to 'multiple voices' in the wildflower industry, by focusing on agency at the smallest unit of consideration – the individual producer. However, structural considerations have also been taken into account in order to construct an overall picture of the southern wildflower industry, and to consider its future trajectories (particularly in relation to tourism).

The study has achieved this by undertaking an analysis of the wildflower industry from a multifunctionality perspective, as described by Wilson (2007). Wilson's approach provides a useful framework for reviewing, at the individual producer level, a small industry such as this one. The multifunctional transition analytical process aggregated the structure/agency interrelationships at individual levels indicated through the actor-network analysis, and the personal desires and drivers affecting farm level decisions, to form a broader picture of productivist and non-productivist trends evident within the wildflower industry.

The producers in the southern wildflower industry at the time that this research was undertaken represented three of Holmes' (2006) six 'modes of production', and exhibited, at an individual level, shifting tendencies along the multifunctionality continuum, depending upon the factors being considered. As noted by Burton and Wilson (2006), tendencies at farm (agency) level towards non-productivist activity (indicating strong multifunctionality inclinations) are nonetheless positioned within a broader structural system, whereby regional, national and global agricultural trends are likely to retain a significant level of influence over the decisions made at agency level. As noted by these authors, agency and structure do not necessarily move at the same pace in either direction along the productivist/non-productivist spectrum,

thus multiple pathways of multifunctionality could be expected, and were found, within the wildflower industry.

The study indicates that producers will be unlikely to respond in a single way to wildflower industry structural or political economy changes in the wildflower industry, and that lifestyle considerations and aspirations at the local and personal levels will play a role in determining the individual responses. However, as noted above, this will all be played out in a context where the majority of producers primarily self-identified as ‘farmers’ and displayed an underlying preference for primary production rather than the service of consumer demand (for example, through tourism).

Furthermore, the research program has concluded that tourism opportunities for the set of wildflower industry participants at the time of this study were very limited, due to their productivist tendencies as outlined above, even though much of producers’ behaviour could be considered to be located at the moderate to strong multifunctionality end of the productivist/non-productivist spectrum. While this perception may have been supported by findings from the survey of tourism operators, nature-based tourism in forested parts of the study area has increased significantly since the time of the research.

Other findings suggest that class differentiations within the wildflower industry have exerted a significant impact on the ability of the industry to work together and grow and diversify. Established industry actors – including growers and wholesalers/exporters – understandably utilised their knowledge and experience as power, and, where appropriate to the size of their operations, used scale as a competitive advantage. Bushpickers, newcomers, and smaller-scale growers were largely viewed with contempt and disdain by larger and established growers. Newcomers expressed difficulty in accessing advice and acknowledged feelings of being treated with contempt. Bushpickers similarly expressed frustration that their roles in maintaining the export volumes necessary to keep Western Australia’s export markets viable were not recognised by the growers. The implications of these issues for industry development are negative, given the global competitiveness of floriculture industries, and the need for (Western) Australian producers to maintain volumes and quality for market presence.

Changing forest management policy, driven in part by changing environmental and social values at a broad community level, has been identified as having a

detrimental effect upon the wildflower industry and its potential for export growth. Specifically, this refers to the ability of pickers to access reduced areas of public land for wildflower harvesting, and as a consequence, supply volumes of product for the export market. The research has found, however, that while wildflower growers and pickers may not have embraced tourism opportunities, recent trends and research in southern Western Australia have shown that forest-based tourism adds significantly more economic value to the regional economy than does wildflower production.

The particular significance of this work lies in the practical assessment and worked example of the multifunctional rural transition discourse in relation to a contemporary, small-scale Australian rural production system. This thesis, in addressing change in the wildflower industry, has provided new insights into how the motivations, decisions and actions of participants in new agricultural industries in Australia can be identified and analysed.

The initial consideration of the political economy of the wildflower industry established a scaled framework within which the industry participants operate, and indicated the (very limited) degree of influence that producers have over their industry. The actor-network analysis of various producer relationships within the wildflower industry added value to this approach, through its in-depth consideration of the network-building and agronomic knowledge construction influences at a producer or local level.

Both of these analytical frameworks added value to the discourse on productivism and non-productivism, which formed the basis upon which the concept of multifunctionality was considered. By articulating this through the worked example of the wildflower industry, the thesis has thus contributed to an appreciation of the utility of the concepts of multifunctionality and of the multifunction rural transition within Australia. This approach provides a tool for evaluating rural circumstances upon which policies for rural change may be developed. That is, this thesis can assist in the development of locally applicable approaches to understanding why and how the many roles of agriculture can co-exist, and how these interact to affect the decisions of industry participants.

Furthermore, the simultaneous existence of 'multiple rurals' – in which industry participants may reflect attributes of productivism and non-productivism – has been

highlighted through the multifunctionality discussion. The individual responses (to the research survey questions), decisions and behaviours of the study participants reflected, for many, a combination of polar-opposite drivers on the productivist/non-productivist scale. This indicates that the transition approach to multifunctionality has merit in the context of understanding the decision-making arrangements of producers within this new Australian industry.

Agricultural policymaking could benefit from the application this multi-faceted approach which utilises the multifunctionality assessment approach for understanding the complicated interactions of factors affecting the decisions of producers in a small rural industry. Referring back to Marsden and Sonnino's (2008) multifunctionality paradigms discussed in Chapter 2, the utility of multifunctionality in achieving sustainable rural development becomes evident. The productivist-non productivist spectrum examination provides a mechanism with which to integrate the social, economic and environmental aspects of rural existence. The approach taken within this thesis has shown that, for the wildflower industry, a multifunctionality assessment has assisted in understanding the relative degrees of influence of the social, environmental and economic motivators at the individual level. Change in any of these variables can shift a producer in either direction towards or away from a more productivist approach. The behaviours of multiple producers in relation to economic, social, and environmental influences can thus combine to affect industry change at a broader level. The multifunctional transition assessment framework facilitates an understanding of how and why rural change may occur, and this thesis has shown that this concept has relevance and applicability within an Australian small rural industry context.

However, the rider to this statement emanates from the status of the wildflower industry which is small, somewhat alternative, and relatively new in comparison to other agricultural production and marketing systems in Australia. The test of the multifunctional transition assessment framework will lie in its application to larger, more established, and possibly less localised industries. This in itself provides a future research opportunity which looks at the interactions of political economy, actor-networks, and productivist and non-productivist thought processes within agricultural decision-making.

Australia has largely relied on agricultural economists to provide insight into rural change (Lawrence 1990). This research provides an alternative contribution to rural

studies which endeavour to explain rural change trajectories in this country, by reference to intensive, qualitative information and the analysis of a small-scale rural industry, operating within a range of mixed farming systems, in a study area subject to significant consumption demand and ongoing regional change.

POST-SCRIPT: WESTERN AUSTRALIA'S WILDFLOWER INDUSTRY SINCE THE COMPLETION OF THE RESEARCH PROGRAM

Due to the time lag between the empirical data collection period and the completion of this thesis, it is important to note the changes which have occurred in the southern wildflower industry in Western Australia. Further research to investigate trends and movements in the political economy structures and the combined agencies of individual participants could prove useful for comparative analyses of industry change.

1.0 Industry size and production levels

As discussed in Chapter Four of this thesis, estimates on the value of the wildflower industry varied significantly at the commencement of this research, and continue to do so. The Western Australian Agriculture Authority (2008) notes that the State's floricultural exports declined from \$15.5M to \$7.12M over the seven years from 2000-01 to 2007-08. This aligns with an overall reduction in WA's horticulture exports from \$198.9M to \$128M during the same period (Western Australian Agriculture Authority 2008). The DEC estimates from its Flora Return Database that approximately 65% of product exported in 2006-07 was from bushpicked (wild-harvested) flowers and foliage from private and public land (Department of Environment and Conservation 2008a). This indicates that bushpicked product volumes remain significant within the export industry.

Reasons for the decline in the value of wildflower exports include a relatively strong Australian dollar, biosecurity issues and high fuel prices (Department of Agriculture and Food Western Australia 2008). Recent wildflower industry publications tend towards negativity and low confidence (see, for example, Musson 2008). However, indications are that levels of cooperation within the industry have improved significantly since the research program was undertaken, and strong efforts are underway to improve its resilience within changing global markets (see Post-script Section 4.0, below).

The number of wildflower producing operations in WA has declined over recent years, although changes to reporting systems within the ABS make direct longitudinal comparison difficult. ABS data indicates 150 'Cut flower and flower seed growing' 'Establishments with Agricultural Activity' in Western Australia at June 30 2001 (ABS 2002), although this did not include an estimate of the standard error to indicate the organisation's confidence in the data¹. Within the two year period of this research program, the number of establishments had declined to 130, with a Relative Standard Error (RSE) of 10-25% indicating some lack of confidence in the information.

By June 30 2007, ABS records had changed to record 'Businesses with Agricultural Activity', of which 69 were producing floriculture 'outdoors' in WA (with a RSE of 10 to 25%), and a further 19 businesses were producing flowers 'undercover'. (This latter number had an error estimate of up to 50%, signifying very little confidence in the adequacy and or accuracy of the data).

These figures indicate a decline in the number of floriculture businesses by approximately 40% between 2001 and 2007 across the State, noting that data confidence errors remain.

Personal communication provided by staff from the Department of Agriculture and Food Western Australia (Poulish 2009) includes a current estimate of 110 wildflower growers in the South West and Great Southern Regions. Poulish suggests that there are approximately 55 growers in each of these regions in 2009, a decline of 15% since the study period.

2.0 Forest management and nature-based tourism

Trends in forest management in southern Western Australia over the period 2001 until 2009 predominantly related to the increasing role of conservation and consumption values, as discussed in Chapter Eight. Since the completion of the empirical research, a number of significant events have occurred in the management of public forests. Each of these events affects the relative value and/or supply of bushpicked flowers and foliage from the study area:

¹ After 2002, the ABS commenced including a measure of "Relative Standard Error" to indicate the degree of confidence in data estimates provided (ABS 2003b).

- A ten-year plan for forest management in Western Australia came into effect on 1 January 2004 (Conservation Commission of Western Australia 2003). The Forest Management Plan 2004-2013:

...formalises the end to logging in old-growth forests, the identification of a comprehensive, adequate and representative system of national parks and other conservation reserves in the south west, and the adoption of internationally-agreed principles of ecologically sustainable forest management (Department of Conservation and Land Management 2004: 31).

The transfer of land tenure from State Forest to various forms of conservation reserves removes the ability to source bushpicked product from those areas of public land subject to this tenure change.

- The 'Walpole Wilderness Area' policy was released in September 2004, including the establishment of new national parks and conservation areas (Department of Conservation and Land Management 2005). Land areas covered by this policy were, prior to the policy, significant sources of bushpicked foliage for export from WA.
- CALM increased its areas of conservation reserves (including National Parks) in Western Australia by over 500,000 hectares (Department of Conservation and Land Management 2005), in line with the "Protecting our Old Growth Forests Policy" of the State government. This effectively removed large blocks from the areas available for the harvesting of flowers and foliage from State Forest.
- A Sustainable Tourism Cooperative Research Centre (CRC) study into the economic value of recreation and tourism in the Southern Forest Region estimated that \$62M in direct tourist expenditure could be attributed to the presence of national parks and forests. The authors found that this equated to between 10% and 14% of the total tourism income generated in the South West Region (Carlsen and Wood 2004). These values, while not directly competing with income generated from wildflower production from natural sources, indicate the *relative value* of nature-based tourism over bushpicked flowers and foliage from southern forests.

- Tourism visits to (all) CALM/DEC managed sites in Western Australia increased from 8.9 million visits in 1998-99 to 12.06 million visits by 2006-07 (Department of Environment and Conservation 2007). DEC visitor surveys in 2006-07 indicated that 35% of tourists were aged 40-59 years, 29% aged 60 and over, and 20% aged between 25 and 39 years. This aligns with client information provided by tourism operators during the wildflower industry survey, and advice regarding the need to service the 'baby boomer' tourist market (Ohe 2006).

The combination of stricter conservation regulations over State owned native vegetation, and the increase occurring in nature-based tourism in the study area, effectively reduces the volumes of bushpicked flowers and foliage able to be sourced. The broader wildflower industry implication from this relates to the volume of bushpicked product as a proportion of overall exports and the presence of all WA-sourced flowers and foliage on export markets. With reductions in volumes of natural harvest product, the ability for WA producers to retain or increase international market share is also reduced.

What has clearly expanded, however, over the past decade, is a tourism market based on the environmental and rural idyll values contained within south west forests. The economic value of this tourism to the study area is significantly greater than that offered directly by wildflower exports. The closure of forest blocks to picking, in their conversion to conservation reserves or national parks, may or may not be scientifically proven to be more sustainable than previous regimes whereby picking was permitted. However, the perception that commercial activity such as picking is environmentally damaging and thus incompatible with conservation objectives has been sufficient for the area accessible to pickers to be reduced. This has contributed to reduced export volumes and industry turnover, as well as a decline in the number of pickers (see Section 3.0, below). The increases in tourism-generated economic returns to the forested areas and to the South West region overall, as shown above, far outweigh any losses in wildflower revenue and export market presence since the study period.

3.0 Industry regulation

Commercial harvesting of native flora in Western Australia remains managed under a framework established by the *Wildlife Conservation Act 1950* and the

Conservation and Land Management Act 1984 (Department of Environment and Conservation 2008a). In addition to this, the Department of Environment and Conservation (DEC) is obliged to conform to the Commonwealth *Environment Protection and Biodiversity Conservation (EPBC) Act 1999*. This obligation requires Commonwealth Government (Department of Environment, Water, Heritage and the Arts, or DEWHA) approval of a 'wildlife trade management plan'.

Within this requirement, a plan for the *Management of Commercial Harvesting of Protected Flora in Western Australia 1 July 2008 – 30 June 2013* has been developed by the DEC, and endorsed by DEWHA (Department of Environment and Conservation 2008a). This plan replaces the plan *Management of Commercial Harvesting of Protected Flora in Western Australia 1 July 2003 – 30 June 2008*, endorsed by the Commonwealth Government in June 2003 (Department of Environment and Heritage 2003). The implementation of the 2008-2013 plan is undertaken in line with the guidelines established through the *Policy Statement No. 13: Commercial Flora Harvesting* (Department of Conservation and Land Management 1993).

The number of Commercial Purposes licences issued for public land bushpicking declined from 480 (state-wide) in 2001-02 to 346 in 2007-08. Commercial Producers licences, which apply for harvesting of native plants on privately owned land, declined in number from 417 to 274 over the same period¹ (Department of Conservation and Land Management 2002; Department of Environment and Conservation 2008b).

4.0 Industry development and support

Since the empirical research program was undertaken, significant changes have occurred in wildflower industry development and support activities in Western Australia. Flowerswest ceased to operate in 2005, following which other producer groups in the State appeared to strengthen. The WA Protea Growers Association and the Wildflower Growers of WA functioning (Betteridge 2008) are still functioning (Daykin 2007; Betteridge 2008; Small 2008).

At the national level, WildFlowers Australia Limited was established in 2007 as a peak national body representing the industry, replacing the Australian Flower and

¹ *Commercial Producers licence numbers include Nurseryman licences.*

Protea Growers Association (AFPGA). WildFlowers Australia aims to achieve improved (wildflower business) profitability, to build the capacity of industry participants, to liaise more effectively with government, and to have broad representation from across the industry. Poulish (2008) notes that deregulation in many export markets has provided opportunities for the Australian wildflower industry to expand, and a move in this direction is being supported by WildFlowers Australia.

Concern has been raised that WildFlowers Australia will see the same fate as Flowerswest when government support ceases, potentially resulting in calls for an industry levy to maintain the organisation (Daykin 2007). Previous calls for industry research and development (R&D) levies have been rejected by producers.

Exporters and wholesalers continue to provide the extension support and marketing advice which was identified during the empirical research. However, this advice is now more sophisticated than that previously offered, indicating an increased depth of relationship between growers and wholesalers within the supply chain. Evidence of the level of exporter/wholesaler support can be obtained, for example, from WAFEX (2009).

At government level, the Rural Industries Research and Development Corporation (RIRDC) continues to invest in the wildflower industry. RIRDC has contributed \$4.9M in industry R&D activities since 1995, with an additional \$2.28M budgeted for the period 2008-2013 (Rural Industries Research and Development Corporation 2008). At the State level, Development Commissions are able to provide support and advice to producers with regard to exporting (Poulish 2008), while DAFWA continues to provide R&D support through its floriculture project investments (Department of Agriculture and Food Western Australia 2008).

These factors indicate a continued and possibly strengthened level of industry cooperation since the empirical research was undertaken. What appears to have emerged, regardless of contraction in industry turnover and participants, is significantly more professional and organised industry than previously noted.

APPENDIX A – LIST OF ORGANISATIONS CONSULTED

- Department of Agriculture
- Department of Conservation and Land Management
- Flowerswest
- Kings Park and Botanic Gardens
- University of Western Australia – Horticulture
- Tourism South West
- Western Australian Tourism Commission
- South West Development Commission
- Great Southern Development Commission
- South Coast Regional Initiative Partnership Team
- Multiple small organisations involved with tourism
- Local government authorities

APPENDIX B – GROWER SURVEY

A CASE STUDY OF THE WILDFLOWER INDUSTRY IN THE SOUTH WEST AND GREAT SOUTHERN REGIONS OF WESTERN AUSTRALIA

A PhD Study currently being undertaken by Debra Pearce, Curtin University.

WILDFLOWER & PROTEA INDUSTRY QUESTIONNAIRE

Dear <<Wildflower Grower Name>>

Attached please find a survey which I am conducting as part of a Doctor of Philosophy (PhD) case study of the wildflower industry of the South West and Great Southern Regions. The study is supported by Agriculture Western Australia's Sustainable Rural Development Program and the South West Development Commission. Wildflower and protea growers and others involved in the industry are being asked to participate.

Thank you for taking the time to read and complete this survey. All answers will be treated confidentially, and will be compiled to develop an overall picture of the industry. For those who would like to participate but do not wish to complete this form, the last page provides the opportunity to indicate if you would prefer a telephone or on-property interview, rather than complete the questionnaire. Please let me know if you prefer this option, so that we can arrange a time/date suitable to you. I can also email an electronic version to you if preferred.

For further information on this research, please feel free to contact me on 9726 1342, or my research supervisor, Dr George Curry at Curtin University, on 9266 3310. It is anticipated the results from this study will be used by the organisations sponsoring it to better understand and support the wildflower industry into the future.

I would be grateful if you could please return the survey in the enclosed, stamped envelope, by July 31st, 2001. **You are not obliged to answer all questions**, however your assistance with the survey is very much appreciated and I thank you for your involvement.

Yours sincerely

Debra Pearce
PhD (Geography) Candidate
Curtin University

PO Box 45
BRUNSWICK JN WA 6224
Ph/Fax (08) 9726 1342
Email pearce@geo.net.au

SECTION ONE - ABOUT YOURSELF

1. What is your current post-code? _____
2. How long have you been at this address? _____
3. Is this post-code the same as that of your wildflower plantation? If not, what is the postcode of your plantation/wildflower property? _____

4. What is your age-group? **(Please circle)**

20-24 25-29 30-34 35-39 40-44 45-49 50-54 55-59 60-64 65+

5. MALE FEMALE

6. What influenced you to enter the wildflower industry (please rank in order from most to least important influences)?

i.
ii.
iii.
iv.
v.

7. Do you consider yourself to be a newcomer to the wildflower industry or to agriculture?

YES / NO

(If NO, go to question 9)

COMMENTS:

8. If so, has this affected how you participate in the industry? In what ways?

9. What was your previous occupation?

--

10. What was your previous post-code? _____

11. How long were you at your previous address? _____

12. Are you currently employed in another occupation? YES / NO
(If NO, go to Question 14)

13. If so, what is that occupation? _____

14. What do you hope to achieve from being involved in the wildflower industry?

SECTION TWO - ABOUT YOUR WILDFLOWER BUSINESS

15. What are your main activities in the wildflower industry?
e.g bushpicking, cultivation, marketing, exporting

16. If cultivating wildflowers, what is the total size of your property? _____

17. How much of your land is allocated to cultivating wildflowers? _____

18. How long has your wildflower business been operating? _____

19. Do you consider yourself professional / amateur / full-time / part-time? **(Please circle)**

20 (A) If you are part-time in the industry, would you like to go full-time?

YES / NO **(If NO, go to question 20C)**

20 (B) If you would like to go full-time, what is preventing you from doing so?

20 (C) If you prefer to remain part-time in the industry, please explain why?

21. Please list the reasons you chose wildflowers as opposed to other industries or jobs.

22. Please rank your sources of income from highest (1) to lowest (5)

_____ Wildflowers _____ Other farm produce
_____ Superannuation _____ Off-farm employment/other job
_____ Other source of income (please describe): _____

23. What is your approximate gross annual income from wildflowers? _____

24. How much would you like to earn from wildflowers? _____

25. Are you freehold/leasehold/mortgaged? _____

26. Have you any intentions of retiring or leaving the industry within the next 5 years?

YES / NO **(Please circle)**

27. Are any of your family members interested in continuing the wildflower business if/when you decide to leave the industry or retire? YES / NO

COMMENTS:

SECTION THREE - ABOUT THE WILDFLOWER INDUSTRY

28. How would you describe the present state of wildflower industry in the South West and/or Great Southern?

29. In order of importance, please list any factors that you think may be impeding the development of the industry.

30. Do you think there is a role for government in the development of the wildflower industry? If so, what is it?

31. What issues related to the wildflower industry would you like to see investigated or researched in the future?

32. Please list 2 or 3 of the most important requirements that have to be met for the industry to succeed over the long term.

33 (A) Are you involved in any industry groups associated with the wildflower industry?

YES / NO **(If NO, go to question 33C)**

33 (B) If yes, which one(s)? _____

33 (C) If you are not associated with an industry group, are there any specific reasons why?

34. What advice would you offer new entrants to the wildflower industry?

SECTION FOUR - TOURISM

35 (A) Do you encourage tourists to visit your wildflower business? YES / NO

(If NO, go to question 36)

35 (B) If yes, what tourism activities are you involved with?

36 (A) If tourists are not part of your wildflower business, would you like to see this develop?

YES / NO **(If NO, go to question 36C)**

36 (B) If yes, what tourism activities would you like to become involved with?

(Go to question 37)

36 (C) If not, are there any specific reasons for your choice?

37. Do you see any advantages for the wildflower *industry* through developing stronger links with the tourism industry? YES / NO

COMMENTS:

SECTION FIVE - LIFESTYLE

38. How would you compare your current lifestyle in the wildflower industry with your previous one?

39. Has your lifestyle in the wildflower industry matched your expectations of what it would be when you entered the industry? YES / NO

COMMENTS:

40. Ideally how would you like to see your lifestyle situation in 5 years?

41. Are there any other comments or issues relating to the wildflower industry that you would like to raise?

42. Can you recommend any other growers or industry participants who may like to complete this survey?

43. How long did it take you to complete this survey? _____

Thank you again for your time in completing this survey.

Please return it in the enclosed, reply-paid envelope to:

Debra Pearce
PO Box 45
BRUNSWICK JN WA 6224

By July 31, 2001.

If you would like to be interviewed as a follow-up to this questionnaire, either by telephone or on your property, please indicate below. This page will be detached from your questionnaire answers when compiling the survey information, in order to maintain your privacy and confidentiality.

Name: _____

Company/Organisation: _____

Address: _____

Telephone: _____

Email: _____

APPENDIX C – PICKER SURVEY

Dear Wildflower Picker,

STUDY OF WILDFLOWER AND PROTEA INDUSTRY IN THE SOUTH WEST AND GREAT SOUTHERN REGIONS OF WESTERN AUSTRALIA

I would like to invite you to participate in a study of the wildflower industry, which is being undertaken as part of my Doctor of Philosophy (PhD) research through Curtin University. The study is looking at why wildflower pickers and growers in the South West and Great Southern Regions have entered the industry, and the goals they have for the industry's and their own futures. The project is also looking at existing and potential linkages between their operations and the tourism industry. Agriculture Western Australia and the South West Development Commission are participating in the research project, which will result in the wildflower industry being showcased as a case study of opportunities and experiences in new rural industry development.

My research will be conducted over the coming 12-18 months, and will involve the attached survey, as well as visits to, and interviews with, volunteers from wildflower pickers, growers and other industry representatives from across the region. Your participation in this research would be greatly appreciated. I am also looking for names of other people who may be involved with the industry, or who may be considering entering it, and I would be very grateful for any information that you could provide in this regard.

Following the initial survey, the research project will involve short interviews (of about an hour) with a number of pickers and growers who wish to speak with me. This may then be followed up by further work with others in the industry to investigate issues raised. Information obtained through the survey and interviews will be collated to present an overall picture of the wildflower industry. Confidentiality will be assured - no individuals or enterprises will be identified in the thesis or in any report based on this research.

I hope you will be able to participate. A reply-paid envelope is enclosed if you do wish to become involved. Please contact myself on 9726 1342 (or email pearce@geo.net.au) or my research supervisor Dr George Curry on 9266 3310 if you would like further information.

Thank you for your time, in anticipation.

Debra Pearce

July 3, 2001

A CASE STUDY OF THE WILDFLOWER INDUSTRY IN THE SOUTH WEST AND GREAT SOUTHERN REGIONS OF WESTERN AUSTRALIA

A PhD Study currently being undertaken by Debra Pearce, Curtin University.

Wildflower Pickers Survey

This survey is being undertaken as part of a study of the wildflower industry in the South West and Great Southern. Results will be used to support the future development of the wildflower industry in the Regions. All information gathered in this survey is confidential, and will be collated for summary purposes only.

Please complete and return this questionnaire in the enclosed envelope by July 31, 2001. If you would like to be involved in an interview to discuss the wildflower industry, or for further information, please contact Debra Pearce on 9726 1342, email pearce@geo.net.au or mobile 0411 717 570. Thank you for your participation.

1. How long have you been picking wildflowers? _____
2. Where are the main areas where you pick? _____
3. How many days per week do you pick? _____
4. What is your age group? **(Please circle)**
20-24 25-29 30-34 35-39 40-44 45-49 50-54 55-59 60-64 65+
5. What is your gender? MALE FEMALE **(Please circle)**
6. Please circle the appropriate answer:
 - 6.1 Wildflower picking is an enjoyable job **Disagree Undecided Agree**
 - 6.2 I would like to earn more from wildflowers **Disagree Undecided Agree**
 - 6.3 I consider myself a professional picker **Disagree Undecided Agree**
 - 6.4 I would recommend the job to others **Disagree Undecided Agree**
 - 6.5 Most of my income is from wildflowers **Disagree Undecided Agree**

6.6 I enjoy the lifestyle the industry offers **Disagree Undecided Agree**

7. How long do you plan to keep picking wildflowers? _____

8. Do you have another job? If so, what is it? _____

9. What was your previous occupation? _____

10. What are the main reasons you began picking wildflowers?

12. What is the post-code where you live? _____

13. Do you think that picking wildflowers fits in well with your lifestyle? YES / NO
(Please explain)

14. Please list any issues which you think the wildflower picking industry needs to address in the future.

Thank you for returning this form in the enclosed, reply paid envelope, to:

Debra Pearce

PO Box 45

BRUNSWICK WA 6224

Telephone/Fax: (08) 9726 1342

Email: pearce@geo.net.au

Mobile: 0411 717 570

If you would like to talk to me about your involvement in the wildflower industry, please write contact details below. All information received will be treated confidentially.

NAME: _____

ADDRESS: _____

TELEPHONE: _____

APPENDIX D – TOURISM SURVEY

A CASE STUDY OF THE WILDFLOWER INDUSTRY IN THE SOUTH WEST AND GREAT SOUTHERN REGIONS OF WESTERN AUSTRALIA

A PhD Study currently being undertaken by Debra Pearce, Curtin University.

WILDFLOWER TOURISM SURVEY

Thank you for taking the time to read and complete this survey. All answers will be treated confidentially, and will be compiled to develop an overall picture of the wildflower tourism industry in the South West and Great Southern. For those who would like to participate but do not wish to complete this form, the back page provides the opportunity to indicate if you would prefer a telephone or in-person interview, rather than completing the questionnaire. Please let me know if you prefer this option, so that we can arrange a time/date suitable to you. I can also email an electronic version to you if desired.

For further information on this research, please feel free to contact me on 9726 1342, or my research supervisor, Associate Professor Roy Jones at Curtin University, on 9266 7094.

When completed, please return this survey in the enclosed reply paid envelope, by May 31 2002. Results from the research will be made available to the tourism and wildflower industries, as well as to the sponsoring organisations, the South West Development Commission and the Department of Agriculture. Thank you.

[A] TOURISM INDUSTRY INVOLVEMENT

1. What is the role of your business in the tourism industry?

Bus charter operator / Other tour operator / Accommodation / Interpretation / Tourist Bureau /

Wildflower Products / Other

Please describe:

2. How long has your business been operating? _____

3. What is the post-code of your business premises? _____

4. How long have you been involved with wildflower tourism? _____

5. Where in the South West or Great Southern Regions do you operate?

6. What is the age range of the majority of your clients? _____

7. What is the country of origin of the majority of your clients? (If Australia, please indicate which state)

[B] WILDFLOWER INDUSTRY

8. Do you believe there are sufficient wildflower tourism opportunities for your clients within the South West and Great Southern? YES / NO (Please circle one) If YES, go to Q.10.

9. If no, where do you believe untapped or new opportunities for wildflower-related tourism businesses exist?

10. Do you consider wildflower tourism to be a growth area in the region? Please give reasons.

11. Do you believe there are opportunities for assistance or support to be given to the tourism or wildflower industries to help in achieving perceived potential? Please explain.

12. Are there any comments you would like to add about wildflower tourism or the wildflower industry in the South West and Great Southern Regions?

Thank you again for your time in completing this survey. Please return it in the enclosed, reply-paid envelope to:

Debra Pearce

PO Box 45

BRUNSWICK JN WA 6224

By May 31, 2002.

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