

The Limestone Coast Food, Wine, Tourism and Agriculture Collaborative

“Raising the Profile of the Limestone Coast”



LIMESTONE COAST COLLABORATIVE PRODUCER SURVEY 2015 - SUMMARY OF FINDINGS

A total of 80 individuals undertook the survey during the period June–July 2015 via Survey Monkey. The survey consisted of 16 questions designed by volunteer members of the LCC, with a mixture of restricted choice and open-ended questions. It was promoted via email to the LCC contact list and other associated producer groups such as Dairy SA, Coonawarra Vignerons Association and Livestock SA (please see list in Appendix 1).

The Producers Survey while not withstanding some design flaws provides some good information to drive the future directions of the LCC.

The title itself is somewhat misleading as in reality the respondents were a mixture of producers (livestock, horticulture, food and wine) and service providers (hospitality, accommodation, retail and tourism). What this does provide however is a good coverage of different businesses from which some common themes and clear messages emerge.

KEY FINDINGS

The majority of respondents represented small to medium enterprises, with over 90% indicating that they have twenty or less employees.

There was not one single challenge faced by all businesses. The five greatest challenges indicated by respondents were:

- visitation (40%)
- marketing (37%),
- skilled workforce (30%),
- sales avenues (29%)
- technology/social media (22%)

This aligned closely with training needs. Priorities for workshops were *Marketing/branding/packaging* selected by over half of respondents (53%), followed closely by *Social media/websites/technology* (46%). *Value adding and diversification* was equally popular with *Staff management and human resources*, selected by 30% of respondents.

NOTE:

This is consistent with the series of workshops currently being presented by the LCC. To date three workshops have been conducted:

- *Workshop 1 Starting and building a small business*
- *Workshop 2 Branding your products and services*
- *Workshop 3 Marketing for maximum consumer impact*

Workshop 4 is yet to be finalised but initial planning is heading towards a focus on social media.

In terms of what respondents would like the Limestone Coast Collaborative to achieve for the region, the **highest priority** was to:

Make a stronger regional brand & be main marketing body for the region

The **lowest priority** for the LCC was seen to be the provision of a quality marque – with half of the respondents (50%) selecting this as their lowest priority (no. 8 choice).

Other important priorities were seen to be *a conduit for better communication between sectors and disseminate news* and *increase visitation by taking the Limestone Coast brand/message to the broader public*.

The need for the LCC to undertake this branding and marketing role was reflected in the answers to questions 8 & 9. In question 8, (*How do you think the Limestone Coast is perceived by those outside of the region?*) nearly a third of respondents (32%) thought that *'No one knows where the Limestone Coast is'*, closely followed by 29% indicating that people outside the region think it is *"too far away"*. Less than 20% of respondents thought the Limestone Coast was perceived as *"an excellent food and wine producing region"*.

In response to question 9 (*What do you believe are the shortfalls in our region?*), *'Promotion of the region as a whole'* was the most commonly nominated shortfall (67%), followed by *transport* (46%) and *tourism activities/services* (32%). A comment that the Limestone Coast is promoted as a stopover or travel through, rather than a destination in its own right was repeated a number of times in response to different questions.

This is consistent with the results of the Visitor Survey (refer to Appendix 2), which highlighted that 30% of those surveyed were just *'passing through'*.

In terms of the strengths of the region, the two responses selected by three quarters of respondents were food and wine diversity (78%) and natural wonders (75%). This was followed by Agriculture, forestry and fishing being nominated by over half the respondents (52%).

This is consistent with responses to question 7, which asked respondents to describe the region for a visitor, and the comment that best encapsulates the themes expressed is:

"Diverse range of world-class nature, wine and food experiences"

The results of the Visitor Survey also highlighted that 74% of respondents selected *natural environment* as what they liked most about the region.

In essence the respondents would like the LCC to brand and market the Limestone Coast as a destination with quality food, wine and nature experiences and be a conduit for better communication between sectors.

The responses to individual questions are detailed on the next page.

PRODUCER SURVEY QUESTIONS

Q.1 Respondent Details

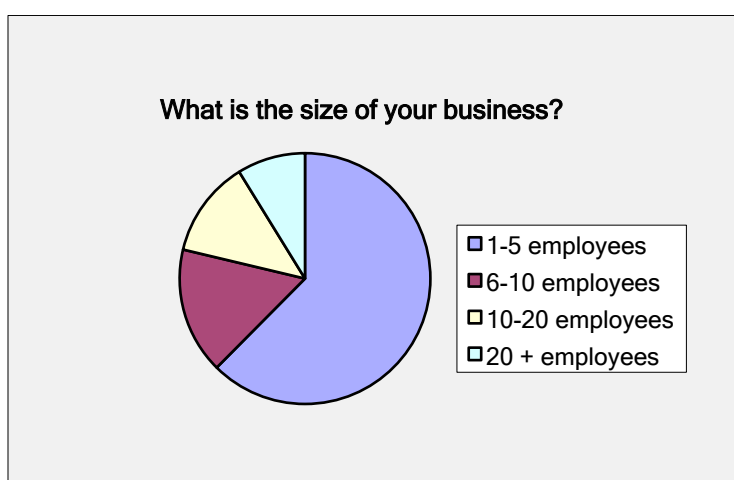
Individuals provided their contact details, which can be used for future communication about the LCC activities. A summary of respondents via postcode aggregation is below.

POSTCODE	LOCATION	NUMBER
5290/5291	MOUNT GAMBIER/KONGORONG/MOUNT SHANCK	18
5271	NARACOORTE/BOOL LAGOON	13
5277	PENOLA/GLENROY	9
5276	ROBE	7
5263	COONAWARRA	6
5272	LUCINDALE/CONMURRA	6
5275	KINGSTON/MOUNT BENSON	4
5280	MILLICENT/BEACHPORT	4
3292/3318	NELSON/PATYAH	3
5270	MUNDULLA	2
5278	KALANGADOO	2
5264	MENINGIE	1
5268	BORDERTOWN	1

Q.2 What is the size of your business?

The majority of respondents represented small to medium enterprises, with over 90% indicating that they have twenty or less employees. Over 60% (50 businesses) have five or less employees. Only seven respondents employed more than twenty people.

Note: the validity of this data is somewhat questionable as the categories are not clearly delineated –for example a business with ten employees could select either 6–10 or the 10–20 category.



Q.3 Which sector do you mainly operate in?

While there was a reasonable spread of industry sectors represented, the raw data can be interpreted in a variety of ways due to the requirement to select only one sector and the options provided i.e. dairy, beef and lamb - but no category for other livestock types (alpaca, pigs, etc.). Retail was included but not wholesale – this has resulted in a high number of ‘other’ responses, along with the fact that many businesses have multiple income streams rather than operate in one area only.

Answer Options	Response %	Response Count
Accommodation provider	20.0%	16
Wine	18.8%	15
Tourism provider	10.0%	8
Beef and Lamb	8.8%	7
Dairy	6.3%	5
Retail	6.3%	5
Grower or Horticulture	5.0%	4
Food producer	3.8%	3
Restaurant/Cafe/Bar/Pub	3.8%	3
Forestry	1.3%	1
Aquaculture/Fishing	0.0%	0
Other Agriculture	0.0%	0
Other (please specify)	16.3%	13
answered question		80

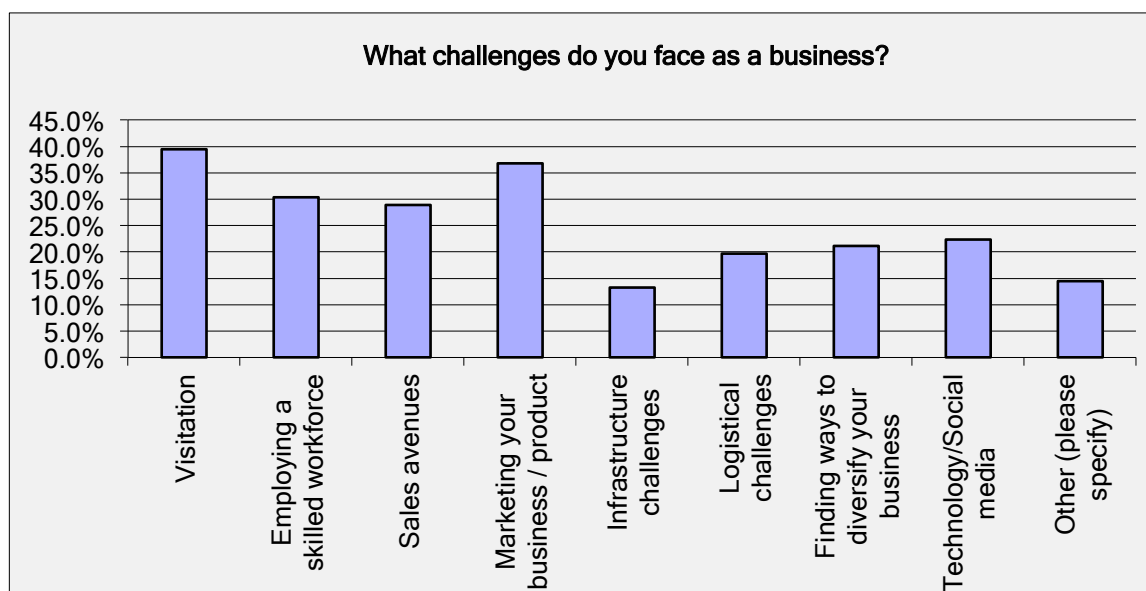
The high number of other responses indicated some issues with the categories provided. If similar responses are aggregated into broader categories a clearer picture emerges:

Answer Options	Response Count
Accommodation provider	16
Wine	15
Livestock	13
Tourism provider	9
Retail and wholesale	8
Hospitality (pub, café etc.)	5
Grower or Horticulture	4
Services	4
Food producer	3
Other misc.	3

Note: there were no responses from the aquaculture/fishing sector, primarily due to the timing of the survey – the key findings of this survey need to be validated by industry representatives to ensure the data is reflective of the issues and opinions of that sector.

Q.4 What challenges do you face as a business?

There was not one single challenge faced by all businesses. Given the high number of accommodation and tourism businesses it is not surprising that 'visitation' was the highest response category, selected by 40% of respondents. This was followed by marketing (37%), skilled workforce (30%), sales avenues (29%) and technology/social media (22%) to make the five greatest challenges.



Q.5 What sort of workshops would assist your business?

Priorities for workshops are clear with *Marketing/branding/packaging* the most popular (53%) followed closely by *Social media/websites/technology* (46%). *Value adding and diversification* was equally popular with *Staff management and human resources*, selected by 30% of respondents.

Answer Options	Response %	Response Count
Marketing/branding/packaging	52.9%	37
Social media/websites/technology	45.7%	32
Value adding and diversification	30.0%	21
Staff management and human resources	30.0%	21
Budgeting and financial planning	22.9%	16
Succession planning	20.0%	14
Customer service	17.1%	12
Export/import information	14.3%	10
Time management	12.9%	9
Corporate governance	5.7%	4
<i>Other (please specify)</i>	7.1%	5
answered question		70
skipped question		10

Q.6 What would you like the Limestone Coast Collaborative to achieve for the region?

Respondents were asked to number the following options from highest to lowest priority. Using only the number one priority response data, the order is:

Answer Options	Response Count
Make a stronger regional brand & be main marketing body for the region	29
Increase visitation by taking the Limestone Coast brand/message to the broader public	18
To be main liaison point for Tourism bodies and operators	7
Be a conduit for better communication between sectors and disseminate news	5
To provide a quality marque to help fill local product supply chains & further afield	5
To provide assistance to business in capacity building	1
To provide training and education to assist business	1
Recognition of the region's achievements	0

If the data is collated for the top five priorities for every respondent then the order of the options is:

Answer Options	Response Count
Make a stronger regional brand & be main marketing body for the region	61
Be a conduit for better communication between sectors and disseminate news	58
Increase visitation by taking the Limestone Coast brand/message to the broader public	55
To be main liaison point for Tourism bodies and operators	49
Recognition of the region's achievements	35
To provide training and education to assist business	28
To provide a quality marque to help fill local product supply chains & further afield	23
To provide assistance to business in capacity building	21

The lowest priority for the LCC was seen to be the provision of a quality marque – with half of the respondents (50%) selecting this as their lowest priority (no. 8 choice).

Q.7 In ten words or less describe the Limestone Coast region as you would to a visitor

This was an open-ended question that provided a wide range of descriptors. Commonly repeated terms include: Diverse, Clean, green, wine, food, scenery and quality. The comment that best encapsulates the themes expressed is:

“Diverse range of world-class nature, wine and food experiences”

Q.8 How do you think the Limestone Coast is perceived by those outside of the region?

Nearly a third of respondents (32%) thought that 'No one knows where the Limestone Coast is', closely followed by 29% indicating that people outside the region think it is "too far away". Less than 20% of respondents thought the Limestone Coast was perceived as "an excellent food and wine producing region".

Answer Options	Response %	Response Count
No one knows where the Limestone Coast is	31.8%	21
Too far away	28.8%	19
An excellent food and wine producing region	16.7%	11
Other (please specify)	10.6%	7
A holiday destination	9.1%	6
Great beach destination	1.5%	1
Crayfish capital	1.5%	1
The hub of the forestry industry	0.0%	0
answered question		66
skipped question		14

Q.9 What do you believe are the shortfalls in our region? Select max of 3

Promotion of the region as a whole was the most commonly nominated shortfall (67%), followed by transport (46%) and tourism activities/services (32%).

A repeated comment in the "other" option is that the Limestone Coast is promoted as a stopover or travel through, rather than a destination in its own right. This was also reflected in the other comments in question 6 above.

Answer Options	Response %	Response Count
Promotion of the region as a whole	66.7%	42
Transport	46.0%	29
Tourism activities/services	31.7%	20
Catering to the luxury sector	25.4%	16
Accommodation provisions	22.2%	14
Eco-tourism	20.6%	13
Customer service	17.5%	11
Availability of online information about the Limestone Coast	15.9%	10
Other (please specify)	19.0%	12
answered question		63
skipped question		17

Q.10 What do you believe are the strengths in our region?

Consistent with responses to question seven, the two responses selected by three quarters of respondents were food and wine diversity (78%) and natural wonders (75%). This was followed by Agriculture, forestry and fishing being nominated by over half the respondents (52%).

Answer Options	Response %	Response Count
Food and wine diversity	78.1%	50
Natural wonders (Caves etc.)	75.0%	48
Agriculture, forestry and fishing	51.6%	33
People and characters of the region	40.6%	26
Community	32.8%	21
Tourism activities/services	23.4%	15
Climate	20.3%	13
Accommodation provisions	14.1%	9
Customer service	9.4%	6
Eco-tourism	1.6%	1
Transport	1.6%	1
<i>Other (please specify)</i>	10.9%	7
<i>answered question</i>		64
<i>skipped question</i>		16

Q 11 If you had to nominate one, who you suggest as being a Limestone Coast regional success story?

Over twenty different options were nominated by respondents, with the most popular success stories being nominated by multiple respondents being:

- Mahalia Coffee (5)
- Coonawarra Wine (5)
- The Barn (5)
- Mayura Station Wagyu beef (3)
- Cape Jaffa wines (2)
- Mini Jumbuck (2)
- Generations in Jazz (2)
- SE Field Days (2)
- Robe Dairy (2)

Q 12 Do you belong to any other groups/committees in the Limestone Coast?

Answer Options	Response %	Response Count
Local tourism development association or chamber of commerce	33.3%	16
Regional wine/vineyard association	25.0%	12
Women in Business and Regional Development	14.6%	7
Limestone Coast Food Group	12.5%	6
MacKillop Farm Management Group	8.3%	4
Farmers Market Group	8.3%	4
Other (please specify)*	37.5%	18
<i>answered question</i>		48
<i>skipped question</i>		32

* included Lions Clubs, Tourism groups and event committees

Q 13 Do you require help in deciding which government and regulatory bodies to engage with?

Just over one quarter of respondents indicated they would require help (26%).

Answer Options	Response %	Response Count
Yes	26.3%	15
No	73.7%	42
<i>answered question</i>		57
<i>skipped question</i>		23

Q 14 Do you have skills that you would like to contribute to the Limestone Coast Collaborative?

Answer Options	Response %	Response Count
Yes	34.0%	18
No	66.0%	35
<i>answered question</i>		53
<i>skipped question</i>		27

Q 15 If yes, please detail these skills below

If yes, please detail these skills below:

We are a tourism association...let's collaborate ...we will provide venues for workshops....

Elke Hocking Consulting - facilitation and delivery of producer workshops (red meat supply chain - beef and lamb)

Regional Tourism development and marketing skills

Marketing and social media knowledge/skills

Tourism, Marketing, Event Management, Strategic Planning, Catering, Functions, Sales, Negotiation, Relationship brokering

Champion of change, Strategic perspective, Comprehensive Understanding of the influence of culture, Creative thinker

We already provide an event which showcases some of the Limestone Coast and it's produce, and have the capacity to develop this further

Governance, community engagement, meeting protocols, government liaison (12 years as Mayor of Mount Gambier & various representative positions).

Eventually yes - but being new in the area I would like to learn more about the area!

As a former vice-chairman of Limestone Coast Tourism, former vice-president of Naracoorte Tourism and former president of Naracoorte Chamber of Commerce, I have been involved in business and tourism bodies for 20+ years. Now operating 5 Bed & Breakfast properties in Naracoorte and an active member of the SA Tourism Industry Council and Accommodation Association of Australia. Interested in developing the Chinese tourism market. Strongly believe in the need for a regional body to replace the now defunct Limestone Coast Tourism. Without a regional voice, the LC is not getting enough attention from the SA Tourism Commission and government bodies.

although we have answered no to this question we are fully supporting of what is trying to be achieved and would be very willing to help in any way

12 years managing The Lady Nelson, 7 years Regional Finance Manager of National Parks

Currently operating national accommodation website, RoomsHere.com

12 years managing B&B enterprise or 3 properties

Happy to help out with facilitation if required.

Chairperson of Kingston Tourism & Development Association. Small business operator (Bliss)

Previously Employed in Tourism Industry in NT, Sales experience

Wine

Diverse experience in tourism/hospitality. Knowledge of other regions success endeavour's

Vast network of tourism/marketing/online providers
 Food and catering services knowledge

Q 16 Tell us in 20 words or less about your Limestone Coast business/operation

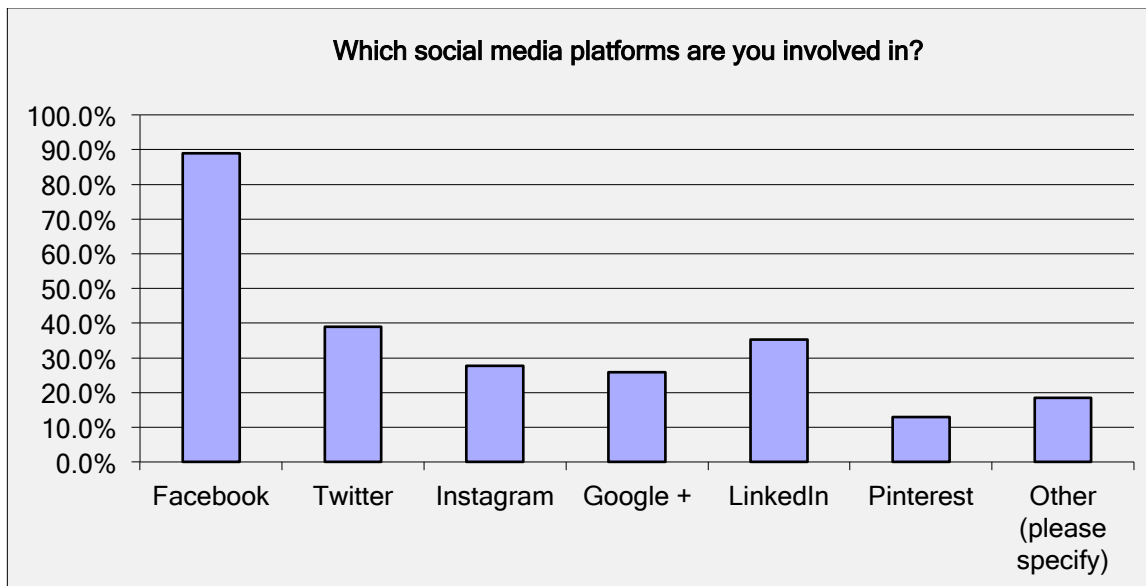
This is an open-ended question that does not really add any great information, other than to get a sense of the diversity of business operations. Some responses are just one word i.e. 'dairy' while others are more descriptive – 'A Hotel Motel that caters around 2000 meals per week and bottle shop catering mainly as a cellar door for locals to sell their wines.'

Q 17 Are you willing to share this story or be a featured business or person on our website and social media pages?

Nearly three quarters of respondents (40 businesses) were prepared to share their story and be featured on LCC social media pages or website.

Q 18 Which social media platforms are you involved in?

Facebook was by far the most popular social media platform with nearly 90% of respondents having a presence. Trip Advisor was mentioned twice in the "other" category.



Q 19 How did you hear about the Limestone Coast Collaborative?

The majority of respondents had heard about the LCCC via email from another group. In the other category a number of respondents indicated they had heard about the LCC at a Mount Gambier Tourism meeting.

Answer Options	Response %	Response Count
Email from another group	45.6%	26
Word of mouth	22.8%	13
Print media	12.3%	7
Social media	3.5%	2
Other (please specify)	15.8%	9
answered question		57
skipped question		23

Appendix 1 – Producer Survey Promotion

- Limestone Coast Collaborative Forum attendees
- Limestone Coast Collaborative Workshop attendees
- Limestone Coast Committee Members and volunteers
- South Eastern Professional Fishermen’s Association Inc (SEPFA)
- DAIRY SA
- MacKillop Farm Management Group
- Livestock SA
- South East Field Days
- Regional Development Australia Limestone Coast
- Beachport Business Development Association
- Red Meat Cluster
- Limestone Coast Food Group
- Kingston Tourism & Development Association
- Over 300 tourist operators via Tourism Industry Development Manager
- Coonawarra Vignerons Association

Appendix 2 – Visitor survey

LIMESTONE COAST COLLABORATIVE VISITOR SURVEY 2015 – SUMMARY OF FINDINGS

This survey was conducted through the Visitor Information Centres and completed by 171 respondents during the first half of 2015. Staff at the Wattle Range Council collated the results.

Visitor origin

Postcode prefix	Response Count
2...	16
3...	33
4...	13
5...	42
6...	13
7...	3
9...	2
Overseas	21

Of those who provided a postcode:

- 80 people were from interstate
- 42 were from South Australia
- 21 were from overseas.

Question 1: What brought you to the Limestone Coast Region?

Answer Options	Response Count	Response %
Natural Environment	62	74%
Passing through	62	74%
Visiting family and friends	45	22%
Food and Wine	14	7%
Advertised attractions	8	4%
Business	7	3%
Sport and recreation	7	3%
Event/Festival	1	<1%
total	206	

Note: Respondents were able to select more than one option

This information correlates with results from the LCC Producers Survey, which highlighted that the Limestone Coast is promoted as a stopover or travel through, rather than a destination in its own right.

The Producers Survey also indicated that In terms of the strengths of the region, the two responses selected by three quarters of respondents were food and wine diversity (78%) and natural wonders (75%).

Question 2: What improvements would you like to see?

Answer Options	Response Count	Response %
Kids' activities	29	28%
Accommodation options*	25	24%
Food experiences	23	22%
Visitor tourism experiences	10	10%
Tourism information	9	9%
Customer service	7	7%
total	103	

Note:

Four respondents mentioned signage.

In terms of accommodation options, more camping and low cost RV options were specifically mentioned by a number of respondents.

There were 25 respondents who indicated that everything was good/no improvement needed.

Question 3: What did you like most about the region?

Answer Options	Response Count	Response %
Natural Environment	127	35%
Tourism experiences	69	19%
Customer service	63	17%
Food quality/diversity	37	10%
Accommodation	34	9%
Wineries	21	6%
Event/festival	7	2%
Sport and recreation	3	1%
total	361	

Note: over 90 people selected more than one option.

If food and wine were aggregated then this would equate to 16%.

Clearly the natural environment is the major factor.