Sugar Research Australia

2023 Grower Survey

A survey of SRA members

June 2023

intuitive solutions

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Context for the research

background

Sugar Research Australia (SRA) invests in evidence-based research, development and adoption (RD&A) activities on behalf of sugarcane growers and millers to meet industry challenges and opportunities.

SRA is funded through levies from growers and millers and a co-contribution from the Commonwealth Government and grants through other government agencies, including the Queensland Government Department of Agriculture and Fisheries.

Central to achieving success of the SRA strategic plan is the engagement, support and advocacy of two key stakeholder audiences, namely:

- Growers; and
- Millers.

These two stakeholder audiences are, after all, the end recipients of the outcomes of the investment in RD&E. Building, nurturing, and sustaining good engagement with growers and millers is therefore vital.

SRA has previously undertaken an annual Grower Survey and a separate Miller Survey.

Both have provided an opportunity to stop, listen and reflect on the level of grower and miller awareness and engagement with SRA programs, communications and initiatives and their satisfaction with the outcomes being delivered through the SRA investments.

This report provides an overview of the feedback provided by growers. A separate report is provided to outline the feedback provided by Millers.

The research approach

The research reflects the views of SRA grower members

Membership of SRA is voluntary and free to all sugarcane growing and milling levy payers. There is a range of benefits associated with being a member, including eligibility to vote at the Annual General Meeting.

That said, growers need to apply for membership to SRA. As at June 2022, SRA had 2,426 members[1].

Currently not all growers are SRA members. Based on figures from the 2021-22 ABS Agricultural Commodities Survey, there are approximately 2,858 sugarcane farms across Australia[2].

As SRA currently only has details for SRA members, the research was therefore confined to seeking feedback from this grower cohort.

There is no information to determine whether any significant differences exist between the perceptions and experiences between members and non-members.

Interpretation of the results from the research should be cognisant of the scope for this program of work.

The research design

The research was aimed at gathering feedback from growers across several different focus areas, including:

1. Measure and report on grower & miller understanding, engagement and satisfaction with the range of services, support, and RD&E delivered by SRA.

2. Provide capacity to explore and investigate results at a segment level. This will include among other things – across regions and across farm size (production).

3. Utilise this and other available information to build insights into the Grower & Miller experience, needs and expectations and experiences with SRA. Describe opportunities to strengthen the relationship, expand the engagement and increase Grower/Miller satisfaction.

Feedback from growers was collected through a computer-assisted telephone interviewing (CATI) survey. A total of n = 300 growers provided feedback using the telephone survey.

Growers completed the survey between 9^{h} May 2023 and 26^{th} May 2023.

A summary of the key findings followed by details results across the research now follows.

1. https:sugarresearch.com.au/about/membership-of-sra/
2. https://www.abs.gov.au/statistics/industry/agriculture/agricultural-commodities-australia/latest-release

Management summary

Sugar Research Australia

2023 Grower Survey

We spoke to 300 levy-paying sugarcane growers who are members of SRA - this is a summary of their feedback.

Performance indicators

Satisfaction with R&D levy investment

0 Extremely dissatisfied 6.6 10 Extremely satisfied

Advocacy of the services, products and information SRA provide

0 Not at all likely 7.1 10 Extremely likely

SRA's organisational planning

	% Familiar	Satisfaction out of 10
SRA's Strategic Plan 2021-2026	28%	6.8
SRA's research investment planning	34%	6.9
SRA's district plans	46%	6.9

Satisfaction with key grower touchpoints

District Managers*	Researchers*	Investment in Areas of Research*	Plant Breeding Program*	Quality of Comms
6.8	7.0	7.1	7.2	7.3

Other notable measures

66% % rating very active or active in their perception of SRA staff engaging in industry matters and events in their district

6.8 out of 10 Ease of using the information from SRA research reports to make changes to their sugarcane farming business (scale of 0 = Not at all easy to 10 = Very easy)

7.0 out of 10 Agreeance that they have access to the right technical information about variety performance in different soil types / conditions (scale of 0 = Strongly disagree to 10 = Strongly agree)

* Average of satisfaction ratings provided underneath each topic.

Insights and observations

The 2023 SRA Grower Survey (restricted to just grower members of SRA) provides a range of feedback from growers on their interaction and engagement with SRA and their experiences with, and assessment of, the outcomes achieved by SRA.

The following discussion focuses on some of the key insights from this survey.

Growers upbeat and confident about the future

There was a much stronger outlook about the future of the Australian sugarcane industry over the next 12 months reported by growers in the 2023 research. The overwhelming majority of growers (83%) were positive about the future of the industry. There is little doubt the improved operating conditions and the current commodity prices have contributed to this outlook.

The results and analysis show that:

- the outlook was reasonably consistent across all grower size cohorts with growers of all sizes typically reporting an upbeat outlook.
- growers in Burdekin (+69) and FNQ (+65) districts were less positive in their outlook than growers from other districts.

+78 = **83%** − **5%**

2022: +44 | **2022: 58%** | **2022: 14%**

Nett Sentiment | % Positive sentiment | % Negative sentiment

A different approach may be required to build grower awareness of and familiarity with the plans

There continues to be a challenge to build grower awareness of, and familiarity with, SRA's Strategic Plan and research investment planning processes. Around one in three growers reported having at least some familiarity with these – indicating there remains work to be done to increase the visibility and reach of these foundation elements of the SRA strategy.

As reported in 2022, the results suggest that where growers are very familiar with these plans, there is typically a strong level of satisfaction.

The continued low level of familiarity suggests that continuing with the same approach is unlikely to create a step change in results. An alternative approach is likely to be required to better communicate, 'tell the story' and engage growers with these broad, high-level plans.

SRA's Strategic Plan 2021-2026

% Familiar 28%

6.8 Satisfaction out of 10

% Heard of but don't know details: 44%

% Wasn't aware: 28%

SRA's research investment planning

% Familiar 34%

6.9 Satisfaction out of 10

% Heard of but don't know details: 37%

% Wasn't aware: 30%

Insights and observations

Grower satisfaction improving

In 2023, growers reported an overall grower satisfaction of 6.6 (on a rating scale of 0 – 10). This represents an uplift of 0.4, a statistically significant improvement over the 2022 result. It is important to acknowledge this improvement in grower satisfaction, on a typically challenging metric.

Based on the ratings provided, we note that:

- Almost four in ten (37%, up 6%) rated their satisfaction strongly (at 8 or above);
- More than half of growers (53%, up 1%) provided a modest rating (5 – 7); while
- Just one in ten (10%, down 7%) rated at 4 or below.

The fall in growers rating low (0-4, down 7%), along with an uplift in growers rating 8+ (up 6%) are the key positive take-outs from this year's feedback from growers. While improved seasonal conditions, prices and the forward outlook have all contributed, growers have also clearly responded to the efforts by SRA over the last 12 months to deepen their engagement.

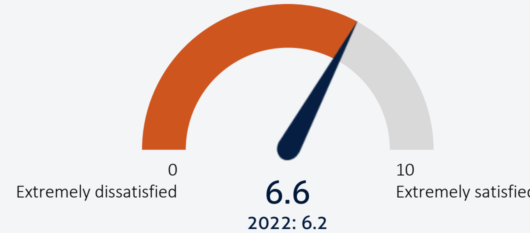
Analysis of the results shows that:

- Growers in Southern Queensland and NSW were more critical (rating 5.9); whilst
- Large (5.8) and extra-large (5.5) growers were more critical than their medium (6.3) and small (6.8) counterparts.

Grower satisfaction with the various grower interactions or touch points was collected across the 2023 survey (as shown opposite). From the feedback, we note that:

- There has been an uplift in satisfaction across almost all touchpoints. There is now a much more consistent level of satisfaction reported.
- Satisfaction with the 'people' touchpoints (District Manager and Researchers) remain slightly lower than other areas but, at the same time, have seen strong uplifts over the last 12 months (up 0.8 and 1.0 respectively). While there are likely to be a number of factors contributing to this, the efforts from SRA over the last 12 months is likely to have contributed to these improvements.

Satisfaction with R&D levy investment



satisfaction with key grower touchpoints

	District Managers*	Researchers*	Investment in Areas of Research*	Plant Breeding Program*	Quality of Comms
Satisfaction	6.8	7.0	7.1	7.2	7.3
	2022: 6.0	2022: 6.0	2022: 7.2†	2022: 6.8	2022: 7.0

* Average of satisfaction ratings provided underneath each topic.
† In 2022, satisfaction was asked across seven areas of research (2023: 10).

Insights and observations

There are some clear differences in the experiences across regions and among the larger growers.

Analysis of the 2023 results show that:

- Growers in Southern Queensland and NSW regions typically reported lower levels of satisfaction than growers in the other regions. We note specifically that:
  - NSW growers reported being less familiar with the key planning strategies, less satisfied with the research investment planning processes and district plans, and less likely to indicate SRA staff were active in engaging with growers. They were also less satisfied with their experience with the District Managers.
  - Growers in Southern Queensland were critical around the SRA strategic plan and investment planning processes and slightly less satisfied with the ease of using SRA information or that they had access to the right technical information. They were also less satisfied with their experience with the District Managers.
- We also note that larger growers (large >20K-50K tonnes and extra-large >50K tonnes) were consistently more critical of their SRA experiences. Specifically, we note that:
  - This larger grower cohort was less satisfied with the SRA Strategic Plan and district plans, and provided lower ratings around the quality of SRA communications and having access to the right technical information.

The differences point to a different experience among these specific grower cohorts. While caution should be exercised in necessarily just responding to the differences, the feedback warrants a review and reflection on the approach adopted and whether growers in these specific regions and sizes can be better accommodated with slightly adjusted engagement strategies.

	Overall	Southern Queensland	New South Wales	All other districts
Satisfaction with R&D levy investment	6.6	5.9	5.9	6.8
Advocacy of the services, products and information SRA provide	7.1	6.6	7.2	7.2
Familiar with SRA's Strategic Plan 2021-2026	28%	29%	22%	28%
Satisfaction with SRA's Strategic Plan 2021-2026	6.8	6.0	7.0	7.0
Familiar with SRA's research investment planning	34%	42%	26%	33%
Satisfaction with SRA's research investment planning	6.9	6.7	5.5	7.1
Familiar with SRA's district plans	46%	39%	40%	48%
Satisfaction with SRA's district plans	6.9	6.6	6.1	7.0
% believe SRA staff are active or very active in engaging in industry matters and events in your district	66%	50%	42%	72%
Satisfied with the quality of SRA communications for providing useful and credible information	7.3	7.0	7.3	7.4
Ease of using the info from SRA research reports to make changes to their sugarcane farming business	6.8	6.4	6.5	6.8
Mean agreeance that they have access to the right technical info about variety performance in different soil types / conditions	7.0	6.4	6.6	7.2

Insights and observations

Building grower engagement should deliver stronger satisfaction dividends

Intuitively, it makes good sense to have a strong engagement with your key stakeholders. Analysis of the 2022 and 2023 survey data clearly highlights the dividend for SRA of developing and nurturing strong grower engagement.

What's clear from the analysis opposite and throughout this report is that:

- There is a clear satisfaction dividend the more familiar growers are with what SRA does. The analysis suggests SRA could consider whether:
  - the current communication channels are likely to continue to be effective in reaching those growers who remain unfamiliar;
  - the content is relevant and likely to 'catch the interest' of growers;
  - the 'messages' are clear and easily understood; and
  - the value proposition around the investment areas is sufficiently strong enough (answering the 'what's in it for me' question).

One solution is likely to be a mix of all the above and more. We also recognise that sustaining familiarity with SRA and its programs and services is and will require an ongoing focus and effort.

	SRA's district plans		SRA staff engagement in industry matters / events in their district	
	Familiar	Not familiar	Active	Not active
OVERALL SATISFACTION	**7.0**	**6.3**	**7.1**	**5.0**
Satisfaction with touchpoints				
District Managers *	7.3	6.3	7.6	4.3
Researchers *	7.3	6.6	7.6	4.8
Investment in Areas of Research *	7.2	6.9	7.4	6.3
Plant Breeding Program *	7.4	6.9	7.5	6.1
Communications	7.7	7.0	7.8	6.2

* Average of satisfaction ratings provided underneath each topic.

Insights and observations

Other insights

The feedback from growers identified several other areas of interest including:

- The 2023 results indicate improvements on the measures associated with SRA District Managers.

  SRA District Managers are, in many respects, the 'shop front' for SRA providing local access for growers to the resources and research supported by SRA. The feedback suggests:

  - There remains a challenge in increasing the profile of District Mangers. The 'experience' of engagement with District Managers appears to be positive. Looking for further ways to improve the reach and visibility of District Managers remains a key challenge.

- Achieving a great uptake of the SRA-led knowledge transfer events should be an area of focus.

  - The results indicate most growers (84%, up from 68% in 2022) are aware of these knowledge transfer events. Uptake remains modest with just one in three (34%) of growers reporting having attended an event in the last 12 months. The 'impact' appears clear (see opposite). Looking for stronger incentives to create stronger levels of participation should be seen as an area of focus going forward.

- Awareness and uptake of SRA's products and services remains varied.

  - The results in 2023 were varied – almost all growers were aware of the Variety Guides and 88% reported having used or planning to use the Guides. By contrast, 74% of growers were not aware of the CliMate app, and just 9% had or were planning to use it. While there will be an ambition to boost familiarity and use across all SRA products and services, SRA may consider a staged approach to target specific services (relevant to the time of year and location) and trial some different approaches to achieve a stronger engagement among growers (this might consider specific grower cohorts or districts).

With this as context, a summary of the opportunities for improvement now follow.

	Sat with R&D levy
Familiarity with SRA-led knowledge transfer events e.g. workshops, field days	
Very familiar (n = 173)	6.9
I have some understanding of it (n = 73)	6.2
I've heard of it but don't know the details (n = 29)	6.2
I wasn't aware of this (n = 11)	5.1

Observations

Based on the feedback provided in the 2023 SRA Grower Survey, the following observations are noted:

- ✓ There have been some improvements over the 2022 results in several of the measures included in the Grower Survey. Clearly there is a much more positive outlook generally for the industry, but it should be acknowledged that the collective efforts from SRA over the last 12 months will have also likely contributed to these improvements.
- ✓ SRA should consider mechanisms to further improve awareness of the District Managers and the opportunities for a wider cohort of growers to engage with them. The satisfaction dividends from engagement are clear. Increasing the visibility and contact is now the challenge.
- ✓ Incentives to improve participation in SRA-led knowledge transfer events should be explored.
- ✓ Awareness and uptake of the SRA products and services varies. Attention should be directed towards exploring mechanisms to increase both awareness of and encouragement to use these products and services on offer.
- ✓ Invest further time considering the lower ratings provided by growers in Southern Queensland and NSW. Creating an uplift among these cohorts of growers will translate to an overall improved result.

As noted in the context for this research, the results and feedback in this survey are from SRA grower members only. It will be important, in the medium term, to consider how to expand the scope of the research to provide a full profile across all levy paying growers, members or otherwise.

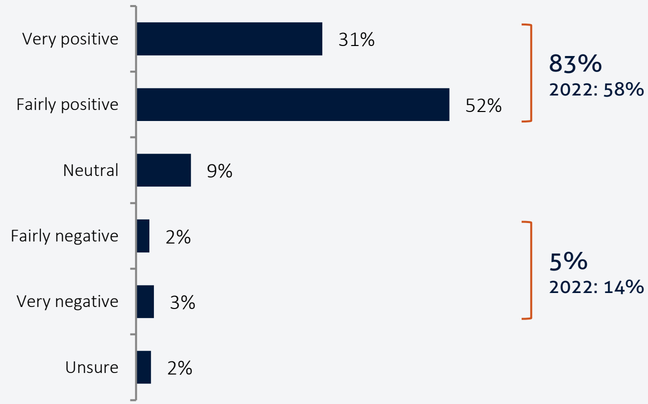
The detailed results from the 2023 SRA Grower Survey now follows.

Detailed results

Grower sentiment

Future of the Australian sugarcane industry

Q4. How do you feel about the future of the Australian sugarcane industry over the next 12 months? Would you say you feel...?
Base: All growers, n = 300



Nett Sentiment (scale of -100 to +100)

Nett Sentiment		% Positive sentiment		% Negative sentiment
+78 2022: +44	=	**83%** 2022: 58%	−	**5%** 2022: 14%

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
Nett Sentiment	+65	+85	+69	+81	+80	+100	+74	+90	+77	+83
% positive	78%	87%	73%	84%	85%	100%	80%	92%	88%	92%
% negative	13%	2%	5%	3%	6%	0%	6%	2%	10%	8%

* Low sample size (n < 30). Results are indicative only.

Detailed results

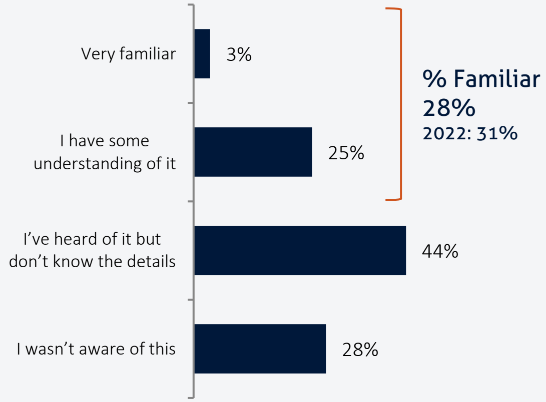
Connection to organisational goals

Familiarity of SRA's plans

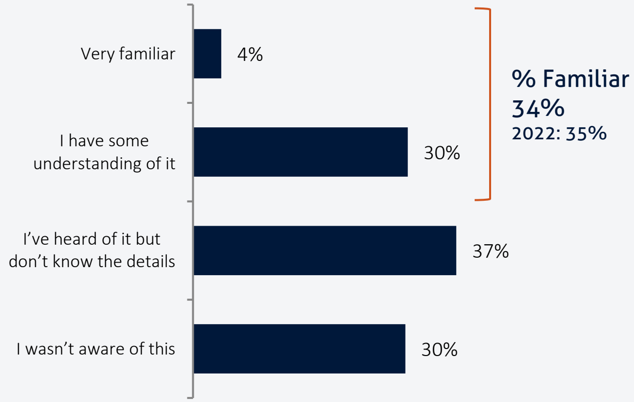
In the last 12 months, SRA has continued to work with growers, milling companies and other industry and government stakeholders to implement their Strategic Plan 2021-2026. It will be valuable to get your feedback on how effective SRA's efforts have been to raise awareness and engage with industry about district productivity issues and opportunities and research investment processes.

Q5. How familiar would you say you are of…
Base: All growers, n = 300

SRA's Strategic Plan 2021-2026 including the outcomes, research missions and service delivery model



SRA's research investment planning



% familiar	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
SRA's Strategic Plan 2021-2026	27%	39%	16%	30%	29%	22%	26%	31%	29%	33%
SRA's research investment planning	20%	41%	28%	38%	42%	26%	37%	31%	17%	25%

* Low sample size (n < 30). Results are indicative only.

Satisfaction with SRA's efforts

Q6. And, overall, how satisfied are you that these address the needs of your farm and district?

Base: All growers who are at least somewhat familiar with SRA's efforts (excluding "Can't say" answers), n varies

SRA's Strategic Plan 2021-2026
(n = 85)

0 Extremely dissatisfied

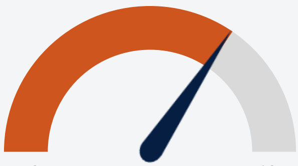
6.8

2022: 6.3

10 Extremely satisfied

Very familiar (n = 13*)	7.2
Have some understanding (n = 72)	6.8

SRA's research investment planning
(n = 90)



0 Extremely dissatisfied

6.9

2022: 6.2

10 Extremely satisfied

Very familiar (n = 10*)	7.2
Have some understanding (n = 80)	6.9

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*14**	*16**	*6**	*32*	*12**	*5**	*36*	*31*	*13**	*4**
SRA's Strategic Plan 2021-2026	6.8	7.4	7.6	6.8	6.0	7.0	7.0	6.5	6.2	6.5

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*11**	*14**	*9**	*35*	*16**	*5**	*48*	*31*	*8**	*3**
SRA's research investment planning	6.4	7.5	7.5	7.0	6.7	5.5	7.2	6.2	6.1	7.0

* Low sample size (n < 30). Results are indicative only.

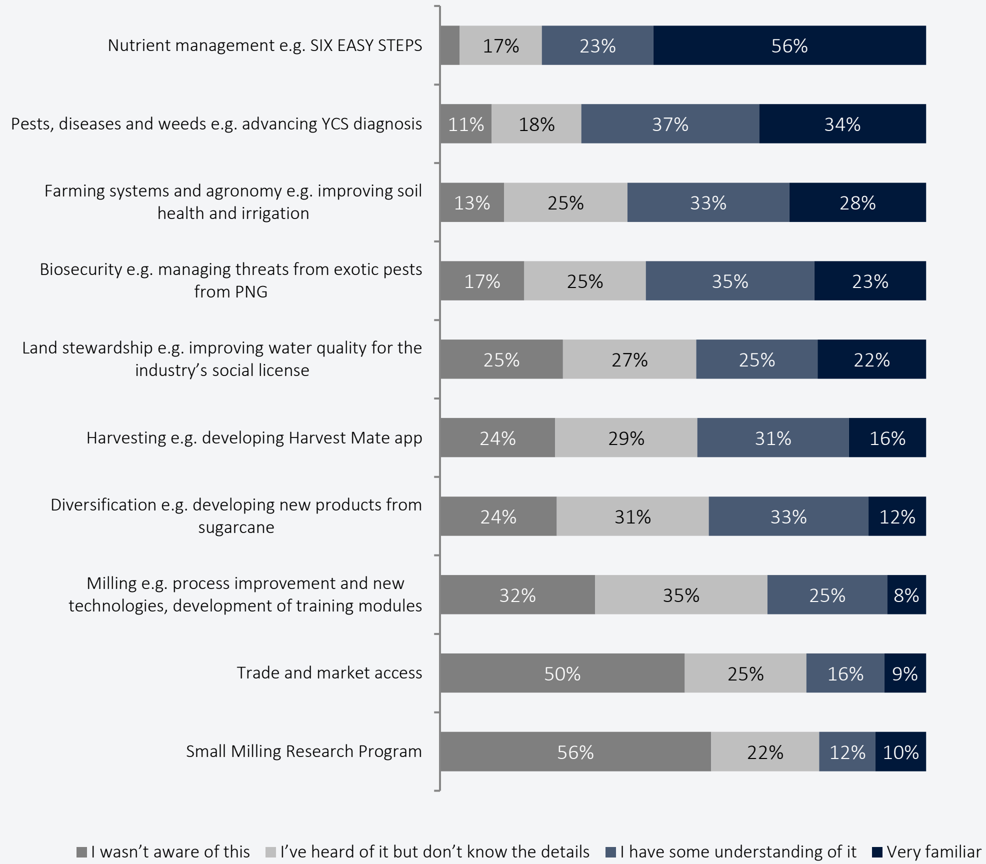
Detailed results

Perceptions about research portfolio

Familiarity of SRA's areas of research investment

SRA's research, development and extension portfolio is balanced across five research missions that deliver tangible solutions to advance the productivity, sustainability, and profitability of sugarcane growers and millers. The next questions focus in on your experiences with SRA's research investments.

Q29. How familiar would you say you are of the following areas of research funded by SRA?
Base: All growers, n = 300



	% Not aware	% Aware	% Familiar	2022 % Familiar
Nutrient management e.g. SIX EASY STEPS	4%	96%	79%	82%
Pests, diseases and weeds e.g. advancing YCS diagnosis	11%	89%	71%	79%
Farming systems and agronomy e.g. improving soil health and irrigation	13%	87%	61%	74%
Biosecurity e.g. managing threats from exotic pests from PNG	17%	83%	58%	70%
Land stewardship e.g. improving water quality for the industry's social license	25%	75%	47%	65%
Harvesting e.g. developing Harvest Mate app	24%	76%	47%	68%
Diversification e.g. developing new products from sugarcane	24%	76%	45%	n/a
Milling e.g. process improvement and new technologies, development of training modules	32%	68%	33%	n/a
Trade and market access	50%	50%	25%	n/a
Small Milling Research Program	56%	44%	22%	33%

Result labels shown if result is 5% or greater.

Familiarity of SRA's areas of research investment

SRA's research, development and extension portfolio is balanced across five research missions that deliver tangible solutions to advance the productivity, sustainability, and profitability of sugarcane growers and millers. The next questions focus in on your experiences with SRA's research investments.

Q29. How familiar would you say you are of the following areas of research funded by SRA?
Base: All growers, n = 300

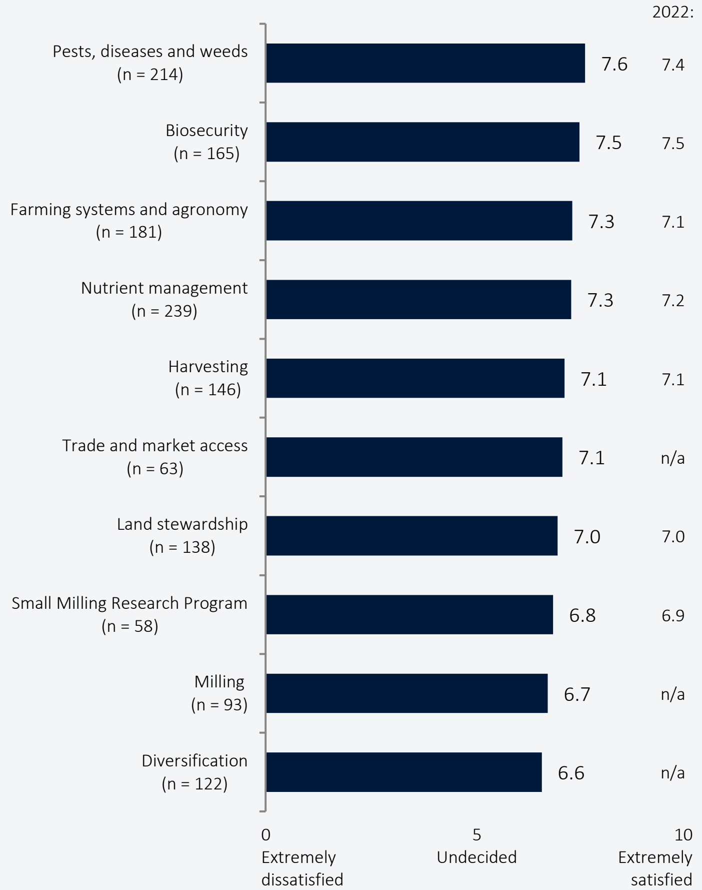
	District						Production Size			
% familiar	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
Nutrient management	89%	92%	68%	77%	74%	71%	76%	87%	79%	100%
Pests, diseases and weeds	72%	84%	69%	72%	62%	67%	69%	74%	81%	75%
Farming systems and agronomy	53%	69%	55%	69%	59%	51%	60%	64%	65%	67%
Biosecurity	61%	57%	53%	60%	56%	51%	56%	64%	52%	58%
Land stewardship	52%	50%	34%	48%	48%	48%	45%	51%	54%	67%
Harvesting	49%	52%	40%	52%	36%	51%	43%	52%	65%	58%
Diversification	37%	46%	41%	48%	41%	62%	44%	53%	21%	42%
Milling	34%	40%	27%	38%	18%	36%	33%	31%	31%	33%
Trade and market access	24%	21%	30%	28%	12%	33%	24%	25%	15%	33%
Small Milling Research Program	41%	35%	14%	17%	10%	22%	24%	18%	17%	25%

* Low sample size (n < 30). Results are indicative only.

Satisfaction with SRA's areas of research investment

Q30. Overall, how satisfied are you that SRA's investment in these areas of research offer value to your farm business and the industry?

Base: All growers who are at least somewhat familiar with SRA's areas of research investment (excluding "Can't say" answers), n varies



7.1

2022: 7.2 *

Average of the ten satisfaction ratings

* In 2022, satisfaction was asked across seven areas of research.

Satisfaction with SRA's areas of research investment

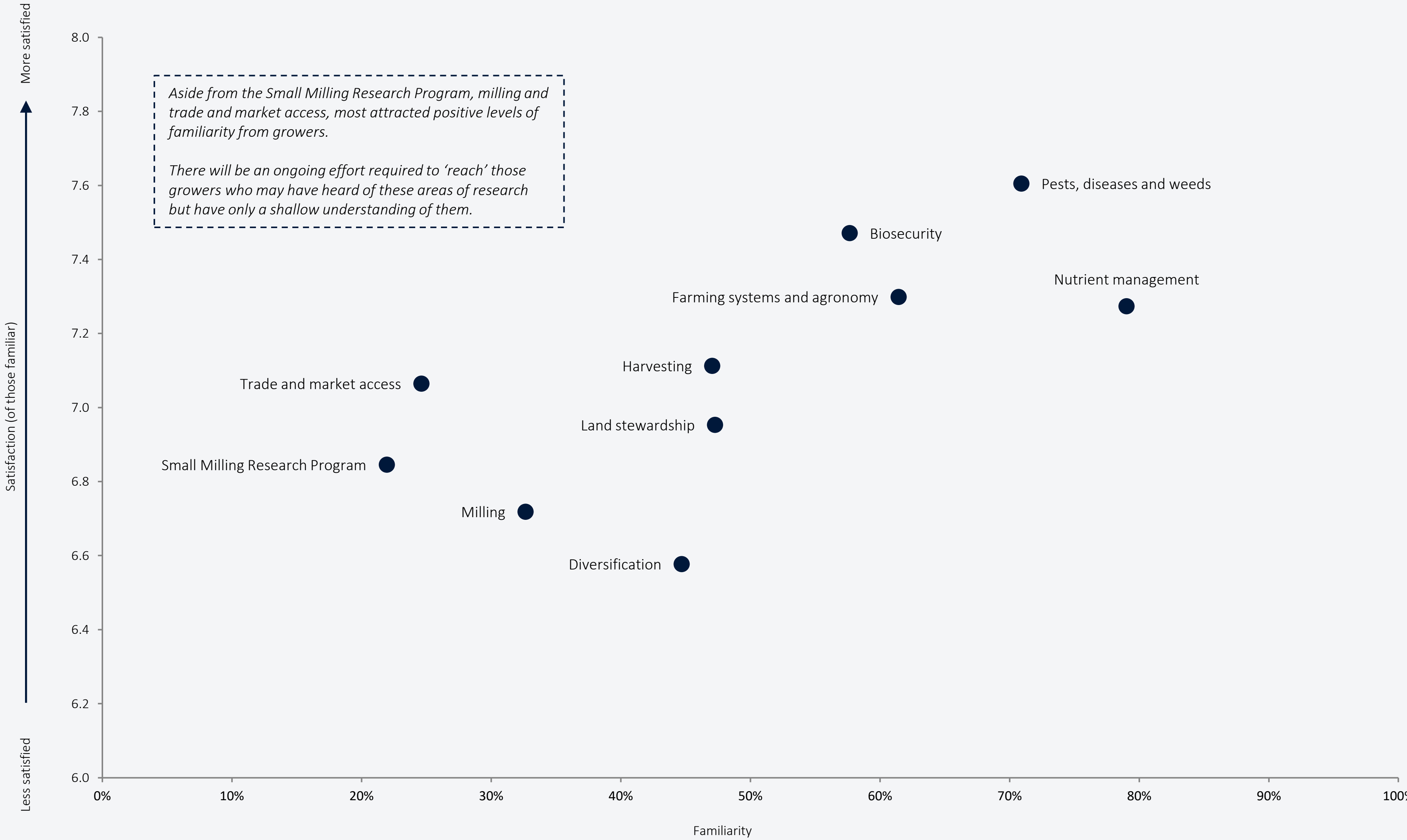
Q30. Overall, how satisfied are you that SRA's investment in these areas of research offer value to your farm business and the industry?

Base: All growers who are at least somewhat familiar with SRA's areas of research investment (excluding "Can't say" answers), n varies

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*11**	*6**	*4**	*16**	*5**	*3**	*29**	*16**	*6**	*3**
Pests, diseases and weeds	7.8	7.9	7.2	7.6	7.2	8.0	7.8	7.4	6.9	7.9
Biosecurity	7.5	7.8	6.9	7.7	6.9	7.8	7.5	7.4	7.4	7.7
Farming systems and agronomy	7.0	7.5	6.7	7.6	7.1	7.9	7.4	7.3	6.8	6.9
Nutrient management	7.1	7.1	7.0	7.4	7.2	8.0	7.2	7.4	6.9	8.3
Harvesting	6.5	7.8	6.0	7.3	7.2	7.8	7.2	7.1	6.9	6.7
Trade and market access	7.7	5.9	6.9	7.3	6.3	7.3	7.4	6.2	7.5	7.5
Land stewardship	7.3	6.8	6.6	7.3	5.7	7.9	7.1	6.9	5.9	7.6
Small Milling Research Program	7.0	6.6	7.2	6.9	5.3	7.7	7.1	5.8	7.3	6.0
Milling	6.8	6.8	6.0	6.7	6.2	7.8	6.9	6.4	6.1	7.0
Diversification	6.5	6.1	6.6	6.9	6.3	6.5	6.4	7.0	5.8	6.8

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Comparison of familiarity and satisfaction



Aside from the Small Milling Research Program, milling and trade and market access, most attracted positive levels of familiarity from growers.

There will be an ongoing effort required to 'reach' those growers who may have heard of these areas of research but have only a shallow understanding of them.

The vertical (Y) axis has been limited to ratings of 6.0 to 8.0 to better display the differences between measures.

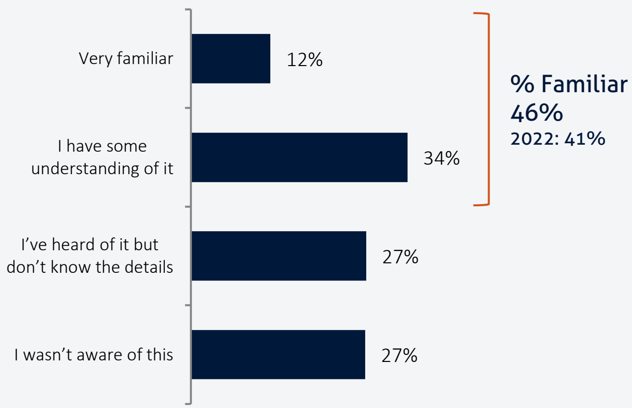
Detailed results

Perceptions of district engagement

Familiarity and satisfaction with SRA's district plans

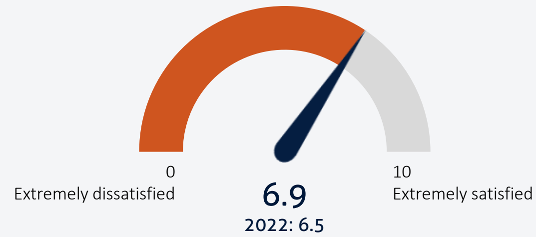
Q5. How familiar would you say you are of...
Base: All growers, n = 300

SRA's district plans to target productivity improvements



Q6. And, overall, how satisfied are you that these address the needs of your farm and district?
Base: All growers who are at least somewhat familiar with SRA's efforts (excluding "Can't say" answers), n varies

SRA's district plans
(n = 134)



Very familiar (n = 41)	7.4
Have some understanding (n = 93)	6.6

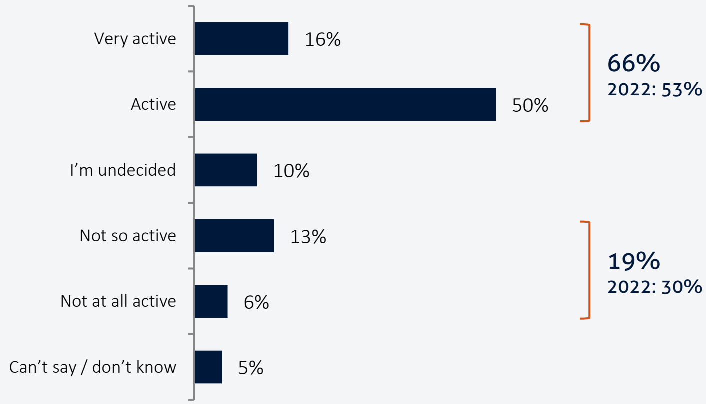
% familiar	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
% familiar with SRA's district plans	45%	64%	36%	47%	39%	40%	45%	47%	54%	33%

% familiar	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*23**	*23**	*15**	*51*	*14**	*8**	*58*	*45*	*26**	*4**
Satisfaction with SRA's district plans	6.8	7.4	6.8	6.8	6.6	6.1	7.1	6.5	6.0	6.5

* Low sample size (n < 30). Results are indicative only.

Perception of SRA staff engagement in industry matter / events

Q7. How active do you think SRA staff are in engaging in industry matters and events in your district?
Base: All growers, n = 300



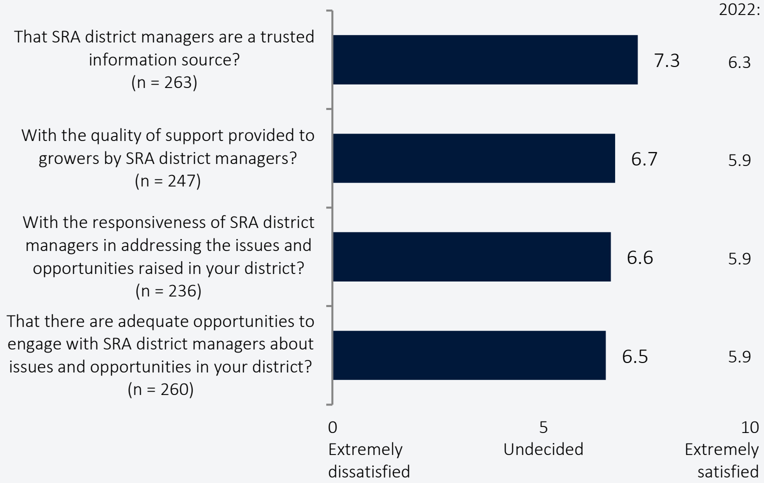
	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
% Active	68%	82%	63%	73%	50%	42%	65%	70%	58%	67%
% Not active	23%	6%	17%	12%	28%	47%	18%	19%	29%	25%

* Low sample size (n < 30). Results are indicative only.

Experience with SRA's district managers

Q8. The following question is about your experience with SRA's district managers. Overall, how satisfied are you…

Base: All growers (excluding "Can't say" answers), n varies



6.8
2022: 6.0
Average of the four satisfaction ratings

	Familiarity with SRA's district plans		Activity of SRA staff are in engaging in industry matters and events in your district	
	Familiar	Not familiar	Active	Not active
Minimum base:	*119*	*117*	*163*	*45*
That SRA district managers are a trusted information source?	7.7	6.9	7.9	5.4
Responsiveness of SRA district managers in addressing the issues and opportunities raised in your district?	7.3	6.2	7.7	4.0
With the quality of support provided to growers by SRA district managers?	7.1	6.2	7.5	4.0
Adequate opportunities to engage with SRA district managers about issues and opportunities in your district?	7.1	6.0	7.4	3.6

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*45*	*32*	*37*	*75*	*35*	*12**	*110*	*78*	*37*	*9**
That SRA district managers are a trusted information source?	7.1	8.1	7.0	7.5	6.6	7.4	7.4	7.2	6.6	7.7
With the quality of support provided to growers by SRA district managers?	6.7	7.4	6.6	7.1	5.9	5.6	6.9	6.5	6.0	6.3
Responsiveness of SRA district managers in addressing the issues and opportunities raised in your district?	6.5	7.6	6.5	7.0	5.7	5.8	6.8	6.4	6.1	5.9
Adequate opportunities to engage with SRA district managers about issues and opportunities in your district?	6.2	7.7	6.7	6.7	5.7	5.6	6.7	6.3	5.9	6.5

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Unsatisfactory experiences with SRA district managers

Q9. You rated less than satisfied on at least one of the aspects of the experience. Why do you say that?
Base: All growers who rated at least one aspect between 0-5 AND provided a valid response, n = 102

Of those who rated less than satisfied (0-5) for at least one aspect of their experience with SRA district managers (34%)...

- 43% - Little contact with district manager / SRA
- 14% - No communication from district manager / SRA
- 12% - Don't know / never met district manager
- 12% - No staff in our area
- 10% - Staff competency
- 8% - Need to listen to growers
- 6% - Reactive not proactive
- 5% - No need to engage with them

Some of what growers said:

"Basically you never see the district managers, I've seen them once at a meeting and I'm a director of Cane Growers and a large grower. Follow on from the fact that I never see them so can't assess their responsiveness."

"We never see them. The one time that I raised something there was a response but there has not been enough response to issues. There is little to no support provided. We have so little to do with them it is hard to know if they are a trusted source or not, develop trust over repeated interactions and if don't have that it is hard to develop trust."

"Nothing ever happens, never see them, still have the same problem with soldier fly as had 50 years ago. We are only a small area and don't have a mill and don't see anybody."

"They are spread out a fair way now, there is no individual office located at our sugar only get an occasional visit and no new information from them. They are not doing anything, they wouldn't know what our problems are. The people are nice people but the support we get is zero, what does SRA do for me - nothing apart from varieties & that's all."

"I don't use them that much, a few contacts have said they are not that active. Things don't move forward as fast as they should with activities. SRA isn't someone I go to."

"Feel that the southern district is being neglected in terms of the variety breeding program, staff cutbacks. growers go to our prod services officer & if there are issues the prod services officer goes to SRA. mainly because I use other sources, don't go directly to them."

"Our district manager is far too busy, he will help me if he can & he returns, but it is because of his workload, can't get around everybody. The information is not getting out to me, nothing about our area."

"Never seen a district manger in 10 years. Research is always incomplete or half arsed, never done properly and they/can't account for results."

"It's to do with the harvesting sector, district manager either doesn't have the time or is not organised enough to get back to us, don't get the response back from him when leave message. Doesn't follow up things such as the harvest app."

"Don't see the district managers, seems to be a lack of communication, nothing has changed, the release of new varieties, don't hear about what is happening, want to hear why it is being done this way."

"SRA has withdrawn behind the barriers we don't actually see them they are just collecting levies and printing glossy papers."

"In Tully, the SRA to me used to be more hands on. Now more top heavy and we go to conferences but they're not listening/hearing the same things unfortunately."

"I hear nothing from SRA, don't know who the district manager is. I hear nothing from them, SRA seems to have forgotten about our area in all aspects."

"If they were not a statutory levy I wouldn't pay them, we haven't had a decent variety in thirty years, they blow money on stupid research, SRA are a detriment to the industry/ they don't listen, they only listen to Qld cane growers association."

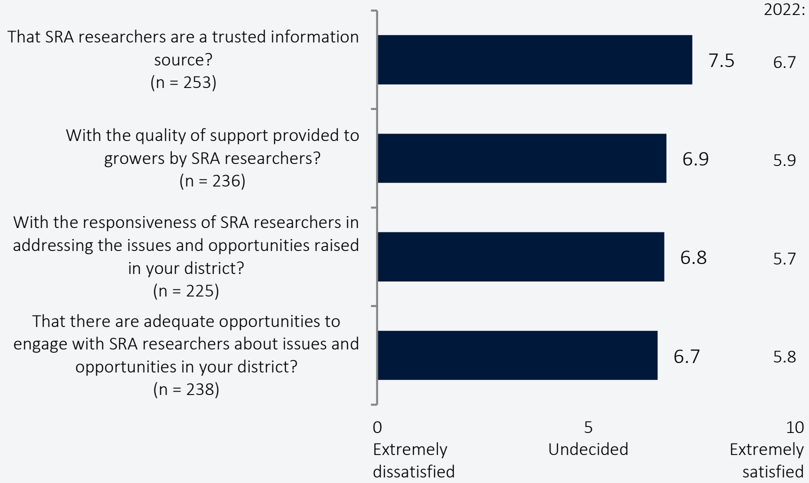
"They are not in touch with what we are doing in the paddock, a trusted source needs to be in touch with what we're doing, I feel they are dabbling in the wrong areas e.g. harvester research is not a field they should be looking at."

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Experience with SRA's researchers

Q10. The following question is about your experience with SRA's researchers.
Overall, how satisfied are you…

Base: All growers (excluding "Can't say" answers), n varies



7.0
2022: 6.0

Average of the four satisfaction ratings

	Activity of SRA staff are in engaging in industry matters and events in your district	
	Active	Not active
Minimum base:	*160*	*45*
That SRA district managers are a trusted information source?	8.0	5.9
Responsiveness of SRA district managers in addressing the issues and opportunities raised in your district?	7.6	4.4
With the quality of support provided to growers by SRA district managers?	7.4	4.7
Adequate opportunities to engage with SRA district managers about issues and opportunities in your district?	7.4	4.2

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*44*	*27**	*31*	*75*	*33*	*12**	*105*	*76*	*32*	*10**
That SRA researchers are a trusted information source?	7.5	8.1	7.3	7.7	6.9	7.6	7.6	7.3	7.0	7.5
With the quality of support provided to growers by SRA researchers?	6.7	7.5	6.7	7.1	6.6	6.0	7.1	6.5	5.9	6.9
Responsiveness of SRA researchers in addressing the issues and opportunities raised in your district?	6.9	7.3	6.8	7.1	6.4	5.6	7.0	6.5	5.8	7.1
Adequate opportunities to engage with SRA researchers managers about issues and opportunities in your district?	6.5	7.3	6.9	6.9	6.1	5.8	6.9	6.3	6.0	6.6

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Unsatisfactory experiences with SRA researchers

Q11. You rated less than satisfied on at least one of the aspects of the experience. Why do you say that?
Base: All growers who rated at least one aspect between 0-5 AND provided a valid response, n = 77

Of those who rated less than satisfied (0-5) for at least one aspect of their experience with SRA researchers (26%)…

26% - Don't see them / never see them

23% - Not enough engagement with them

19% - Don’t have much contact with them

14% - No sharing of information

13% - Feedback on the work being done / quality / relevance

9% - Know little about what they are involved with / doing

6% - Know little about them

Some of what growers said:

“Never seen not met them and don't know who they are - only deal with the MAPS people. Don't seem to have solved the problems with the diseases in our district, still have YCS problems and no one has worked out what pachymetra is about or fixed the rust problems. They might support other farmers, but I have had no support, never seen them, don't know who they are."

"Don't see the researchers. We were promised that SRA would breed for 2 year old canes in NSW, but they breed and release them in QLD and then bring them down here as one year old canes, they are not as good as they used to be, yield is declining because of varieties."

"Don't see or hear anything from the researchers. Not hearing anything from SRA even via the prod board about issues in our area. We used to have extension officers when it was BSES but nothing like that in our district now so no support. The information from R&D isn't getting back to us as growers' question are they doing R&D."

"Wish that there was a lot more interactions with the growers about trials and getting feedback back to the grower about the trial results, seems to be a bit lacking and also more trials in the district."

"Don't usually see much of the researchers lately. Feel they don't seem to listen to what we raise as issues, seem to focus on what they think is important."

“Our area is so small they are doing the best they can too small for them to bother with us."

“After the flooding we haven't engaged with them as much but we do see some field days and stuff but not a lot in NSW. With variety trials we know we can pick up the phone and talk to the variety officer but other than that don't know what is happening in the research area especially in NSW."

"Don't see anyone and have had no call to go there, go to others for information."

“They have field days but there is a lack of communication with what they are doing & the results on the ground. Because they are not getting results with the new varieties the productivity has dropped off because of weather, bugs and varietal decline."

"Have had no contact with the researchers from SRA don't even know who they are. Not bothered to come out and see me or help with the weed problem."

“Because I've lived long enough to see so many of these research programs go round and round nothing seems to change. I think its duplicated so many times, hey go over budget every year."

"Basically, never see them, never get the opportunity to discuss with them. No chance of them responding when you don't see them. Because we don't see them, I do trust their information though when I get it."

"I've been doing this for a long time and I've seen that over the years there is not as much money to go around to pay for the services. Current staff are good, but it is a limited resource because of funding."

"Well, you know I don't know what they're supporting and what they're doing. I don't hear from them they never go to my farm. Shed meetings that's about it, otherwise no contact with them."

"We never see them, can't engage if they are not part of the industry. Unless we look up the papers on the internet, we don't know what they are doing most of the time. There is no grower engagement."

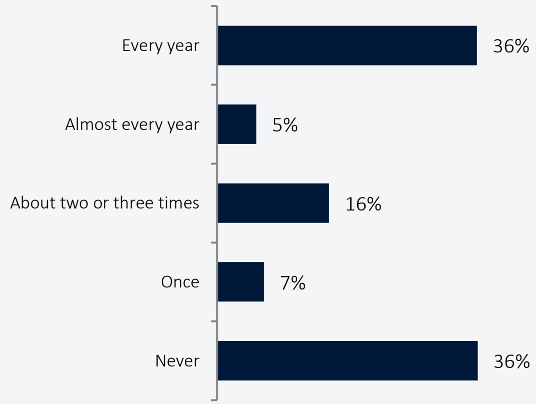
Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Detailed results

Experiences with SRA products and services

Use of SRA's Weed Management Manual

Q12. How often in the last five years have you used SRA's Weed Management Manual to set up your spray program?
Base: All growers, n = 300

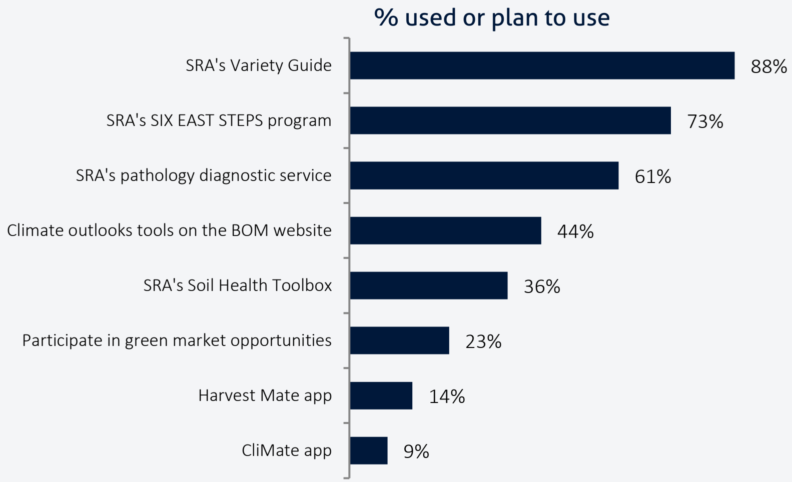


	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
Every year	31%	48%	21%	44%	22%	56%	37%	36%	23%	58%
Almost every year	10%	4%	2%	4%	9%	0%	4%	11%	2%	8%
About two or three times	9%	16%	11%	16%	23%	18%	18%	10%	15%	0%
Once	10%	1%	9%	6%	9%	0%	7%	7%	4%	8%
Never	40%	31%	58%	30%	37%	26%	35%	36%	56%	25%

A summary of the experience with SRA's products and services

SRA provides a range of different products and services to growers and millers. The next questions look to understand your experiences with some of these offerings.

Q13-Q20. How likely is it that you will use the following product/service or participate in the following opportunities?
Base: All growers, n = 300



	District						Production Size			
% used or plan to use	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
SRA's Variety Guide	89%	98%	69%	91%	84%	89%	84%	96%	88%	100%
SRA's SIX EASY STEPS program	89%	80%	61%	73%	64%	60%	67%	85%	79%	100%
SRA's pathology diagnostic service	70%	64%	39%	67%	56%	55%	57%	71%	73%	83%
Climate outlooks tools available on the BOM website	50%	54%	43%	35%	52%	33%	43%	46%	33%	58%
SRA's Soil Health Toolbox	44%	48%	29%	33%	30%	34%	32%	47%	31%	50%
Participate in green market opportunities	22%	23%	30%	23%	20%	11%	20%	26%	38%	33%
Harvest Mate app	8%	18%	16%	19%	10%	7%	13%	16%	15%	50%
CliMate app	7%	13%	2%	9%	12%	7%	8%	11%	8%	0%

A summary of the experience with SRA's products and services

SRA provides a range of different products and services to growers and millers. The next questions look to understand your experiences with some of these offerings.

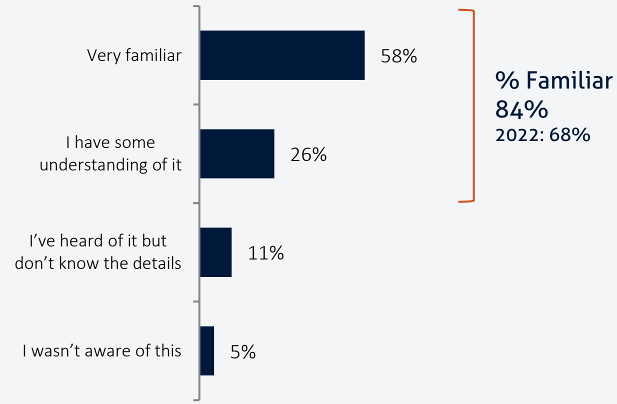
Q13-Q20. How likely is it that you will use the following product/service or participate in the following opportunities?
Base: All growers, n = 300

	I have used the product/service	I plan to use the product/service but haven't yet done so	I intend to use the product/service but do not have specific plans at this time	I do not intend to use the product/service	I am not aware of the product/service
Q13. How likely is that you will use the Harvest Mate app?	3%	11%	17%	37%	32%
Q14. How likely is that you will use SRA's SIX EASY STEPS program for nutrient management?	68%	5%	4%	13%	10%
Q15. How likely is that you will use SRA's Soil Health Toolbox to manage your soil health?	29%	7%	9%	27%	29%
Q16. How likely is that you will use SRA's pathology diagnostic service to test your cane for RSD, Pachymetra and nematodes?	58%	3%	3%	17%	18%
Q17. How likely is that you will use the climate outlooks tools available on the BOM website?	39%	4%	5%	22%	29%
Q18. How likely is that you will use the CliMate app?	4%	5%	5%	13%	74%
Q19. How likely is that you will use SRA's Variety Guide to select new varieties to plant and trial on your farm?	85%	2%	4%	6%	2%

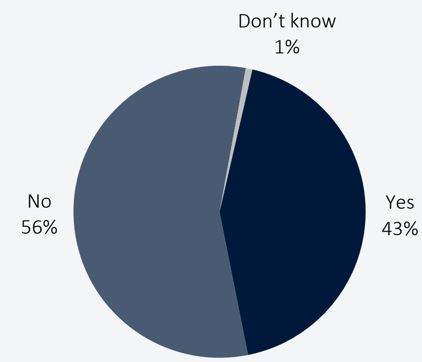
	I have participated in green market opportunities	I plan to participate in green market opportunities but haven't yet done so	I intend to participate in green market opportunities but do not have specific plans at this time	I do not intend to participate in green market opportunities	I am not aware of green market opportunities
Q20. How likely is that you will participate in green market opportunities such as carbon programs, renewable energy, environmental stewardship schemes (e.g. reef credits)?	12%	11%	28%	30%	19%

Attending SRA-led knowledge transfer events

Q21. How familiar would you say you are with SRA-led knowledge transfer events e.g. workshops, field days?
Base: All growers, n = 300



Q22. Have you attended any SRA-led events or extension/adoption programs in the last 12 months?
Base: All growers who are familiar with SRA-led knowledge transfer events, n = 255



36% of all growers are familiar with and have attended SRA-led events in the last 12 months.

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
% familiar with SRA-led knowledge transfer events	89%	90%	82%	82%	83%	71%	81%	91%	85%	83%
Base:	*47*	*31*	*35*	*91*	*37*	*14**	*110*	*93*	*41*	*10**
Have attended SRA-led events in the last 12 months	56%	53%	14%	47%	38%	38%	40%	48%	54%	60%

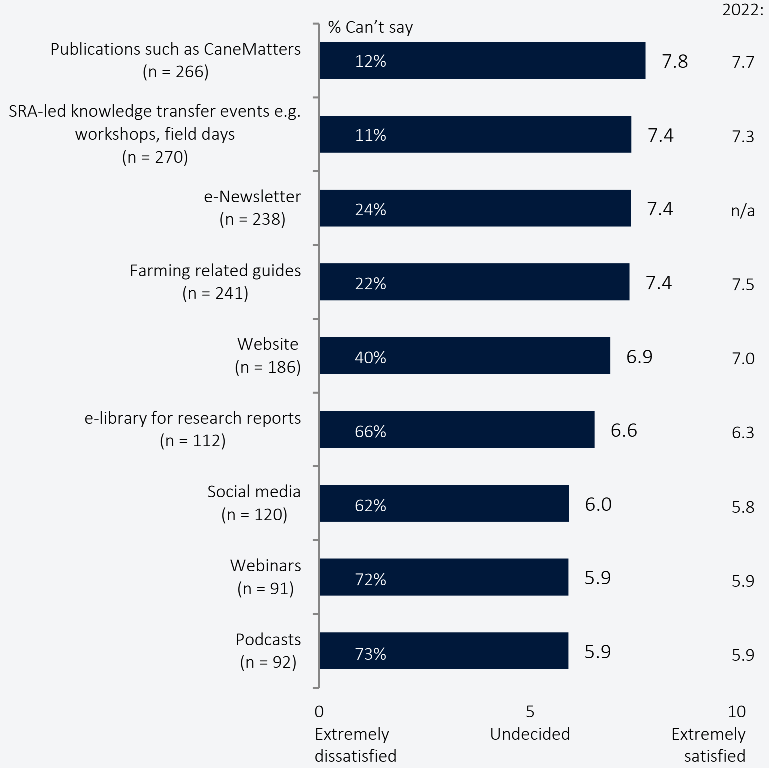
Detailed results

Communication needs and experiences

Satisfaction with channels to access information

Next, we would like to understand how you like to receive information about SRA and sugarcane farming and milling. SRA will use this information to improve how they communicate with sugarcane growers in the future.

Q32. How satisfied are you with the following communication channels to access information about sugarcane farming research?
Base: All growers (excluding "Can't say" answers), n varies



Of the 9 listed channels of communication…

5.2	Average number of sources rated
99%	Provided a rating for at least one source
72%	Provided a rating for four or more sources
16%	Provided a rating for all nine sources

Satisfaction with channels to access information

Next, we would like to understand how you like to receive information about SRA and sugarcane farming and milling. SRA will use this information to improve how they communicate with sugarcane growers in the future.

Q32. How satisfied are you with the following communication channels to access information about sugarcane farming research?
Base: All growers (excluding "Can't say" answers), n varies

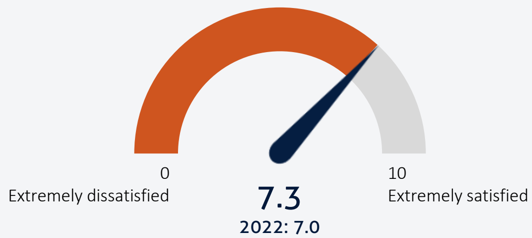
	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	14*	16*	13*	23*	14*	4*	34	29*	19*	6*
Publications such as CaneMatters	7.5	7.9	7.6	8.0	7.7	7.8	7.9	7.7	6.8	7.1
SRA-led knowledge transfer events e.g. workshops, field days	7.4	7.8	7.1	7.7	7.1	6.9	7.6	7.3	6.8	6.3
e-Newsletter	7.6	7.9	7.2	7.5	7.2	7.1	7.6	7.2	6.6	6.0
Farming related guides	7.1	7.6	7.2	7.6	7.2	7.3	7.5	7.5	6.6	6.4
Website	6.6	7.3	6.7	7.3	6.7	6.6	7.1	6.9	5.6	6.4
e-library for research reports	6.2	6.0	6.4	7.2	6.7	5.8	6.8	6.3	5.4	5.6
Social media	6.1	5.5	5.6	6.8	4.8	5.7	6.2	5.7	4.7	4.0
Webinars	6.3	6.0	5.4	6.6	5.3	5.3	6.2	6.2	3.7	4.9
Podcasts	6.5	6.1	5.9	6.3	4.9	5.8	6.4	5.6	4.7	4.7

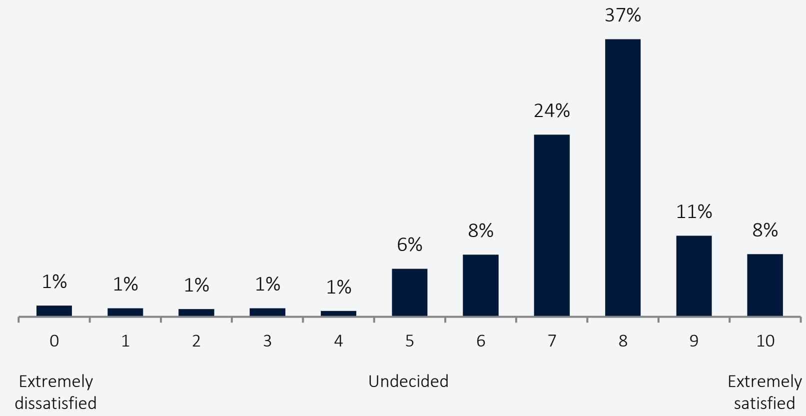
* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Satisfaction with the quality of SRA communications

Q33. How satisfied are you with the quality of SRA communications for providing useful and credible information?

Base: All growers (excluding "Can't say" answers), n = 297





District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
7.3	7.5	7.2	7.6	7.0	7.3
n = 54	n = 34	n = 40	n = 105	n = 45	n = 19*

Production Category

Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
7.5	7.2	6.4	6.4
n = 135	n = 100	n = 48	n = 12*

* Low sample size (n < 30). Results are indicative only.

Unsatisfactory experiences with the quality of SRA communications

Q34. You rated less than satisfied with the quality of SRA communications for providing useful and credible information. Why do you say that?
Base: All growers who rated the quality of SRA communications between 0-5 AND provided a valid response, n = 46

Of those who rated less than satisfied (0-5) on the quality of SRA communications (15%)…

30% - Not aware of information

24% - Usefulness / relevancy of the information

17% - Not engaged with SRA / don't hear from them

13% - No information / resources for local area

13% - Credibility of the information provided

11% - No interest in the information

11% - Prefer face to face

9% - No time

Some of what growers said:

"I think they need to be on the ground more, get onto the farms more, the field is good but we only get one and we are usually planting at that time, the newsletter - I get a thousand emails a week and I usually flick past it meaning to get back to it and then don't have time, the magazine - turns up and sits there for a month before the plastic comes off."

"I just think they don't market themselves well enough, don't hear enough from them, its sporadic. They don't do enough workshops, they are not putting themselves out there, doesn't seem to be a person leading & promoting SRA in the area."

"There has got to be a better way, everyone is time poor and there is so much information out there, if in front of computer then not getting work done on the farm, need to be able to access information on the run."

"Well basically because they're not doing it for our area, you know what I mean, it's just irrelevant garbage to me what they put out because they don't do trials down here."

"At the end of the day I still have to make the decision. Sometimes too much information."

"They don't communicate how growers need them to communicate, computer is not the way most growers want to access information, especially larger growers want to meet face to face."

"I don't use a lot of it, the information they are putting out about new varieties is not tried and proven, they are very rough guides, you can t really take their advice."

"Get out and about a bit more. In Tully we hear more from RSA on the ground. Dr Danielle Scorpo who is a local and is fantastic with nitrogen and is RSA."

"They cater for Queensland growers the information and we have to pick what is useful. They are one year in Queensland and cater for that."

"Because I don't get enough of what I want to hear about, don't hear about anything new or what is coming up or happening."

"Just don't read it totally. I just skim and leave for my husband. No feedback comes to me from him - he's usually too tired."

"Don't have FAT's on red volcanics (kraznozems) in this area. Don't trust information being provided."

"Not much is useful. They don't concentrate on the fact that the industry in Australia is struggling badly."

"Actually interact with the farmers, don't send a book and say there you go. More substance please."

"Don't get any, never had the e-newsletter, don't get any other communication apart from CaneMatters mag."

"We get a fancy looking pamphlet I look at it but if nothing takes my eye then I don't continue to read."

"Face to face and electronic is okay to receive but I'm not sure if getting quality info."

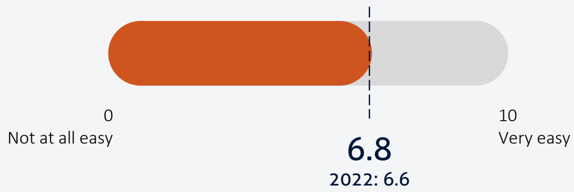
"They just yeah I don't think they're hitting the mark. Not enough information getting out."

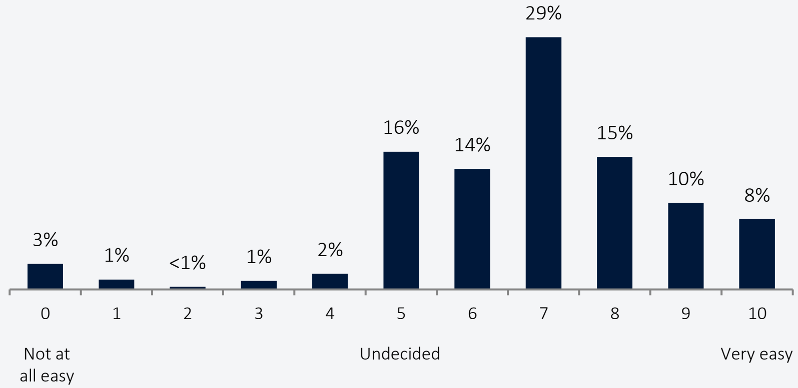
"Must be looking in the wrong places, don't use or go looking in the sources they use for communication."

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Ease of use of info from SRA research reports

Q35. How easy is it to use the information from SRA research reports to make changes to your sugarcane farming business?
Base: All growers (excluding "Can't say" answers), n = 263





District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
6.4	7.4	6.8	6.9	6.4	6.5
n = 50	n = 32	n = 35	n = 92	n = 39	n = 15*

Production Category

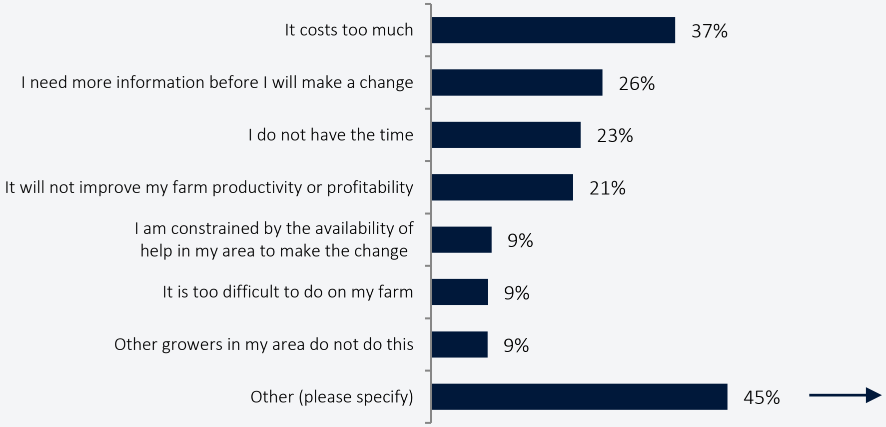
Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
6.9	6.5	6.6	6.0
n = 117	n = 92	n = 41	n = 11*

* Low sample size (n < 30). Results are indicative only.

Main challenges in using info from SRA research reports

Q36. Please indicate what the main challenges are for you:
Base: All growers who rated 0-5 on the ease of use of info from SRA research reports, n = 67
Multiple responses accepted. Results may not add to 100%.

Of those who rated less than easy (0-5) on the use the info from SRA research reports to make changes to the business (20%)…



"Access to the information."

"Can't reach staff at SRA & when I do they are slow to respond – understaffed."

"Change e.g. from one style of farming to another, more of a conventional style to a modern system."

"Don't have info or contact to make those decisions."

"Don't see much benefit in the messages. The varieties are not working."

"Every farm is different, being viable, can change very quick."

"Find information from other sources."

"I am very small, so don't follow much research, although I read it."

"I do not hear that."

"I need proven information before I can make a change."

"I think what I do is most profitable."

"If I can't see that it will make a difference, I won't do it."

"Information is not area specific - Ingham and Bundaberg are different to Mackay."

"Irrelevant to my business now. No good me changing its all coming out; the last 6 years have all been up in the air if they're going to take our cane, they shut Merriba mill. The whole industry stress and chaos for 6 years."

"It is not a high priority, it is our secondary income and it looks after itself."

"Just not a big reader so don't read research reports, talk to other farmers instead and make decisions that way."

"Most of it is geared for QLD."

"My age and I'm trying to get out of the farm."

"Need boots on the ground to help us understand and implement changes."

"Not addressing productivity issues."

"Not an analyst and a lot of pie charts etc."

"Not relevant to the Burdekin."

"Not sure the changes will make enough difference to be of value."

"Sometimes their ideas are good, but technology is unaffordable on small scale farming."

"They are not a priority, at times other things are a priority."

"They don't have the information we require."

"Time to learn the new & when it fits into my program & also that already invested in capital items that are investment so have to use that."

"Use own resources to make the decision, not SRA."

Main challenges in using info from SRA research reports

Q36. Please indicate what the main challenges are for you:
Base: All growers who rated 0-5 on the ease of use of info from SRA research reports, n = 67
Multiple responses accepted. Results may not add to 100%.

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*20**	*4**	*13**	*17**	*9**	*4**	*23**	*27**	*9**	*7**
It costs too much	30%	45%	29%	41%	52%	28%	43%	22%	56%	14%
I need more information before I will make a change	35%	32%	14%	25%	4%	57%	22%	26%	56%	57%
I do not have the time	18%	45%	25%	25%	28%	0%	13%	37%	33%	29%
It will not improve my farm productivity or profitability	9%	32%	34%	27%	28%	0%	13%	33%	44%	14%
I am constrained by the availability of help in my area to make the change	18%	0%	4%	12%	3%	0%	4%	15%	22%	14%
It is too difficult to do on my farm	13%	0%	0%	18%	0%	0%	9%	11%	0%	0%
Other growers in my area do not do this	0%	45%	15%	5%	16%	0%	13%	4%	0%	0%
Other (please specify)	74%	23%	36%	30%	52%	15%	43%	48%	33%	71%

* Low sample size (n < 30). Results are indicative only.

Detailed results

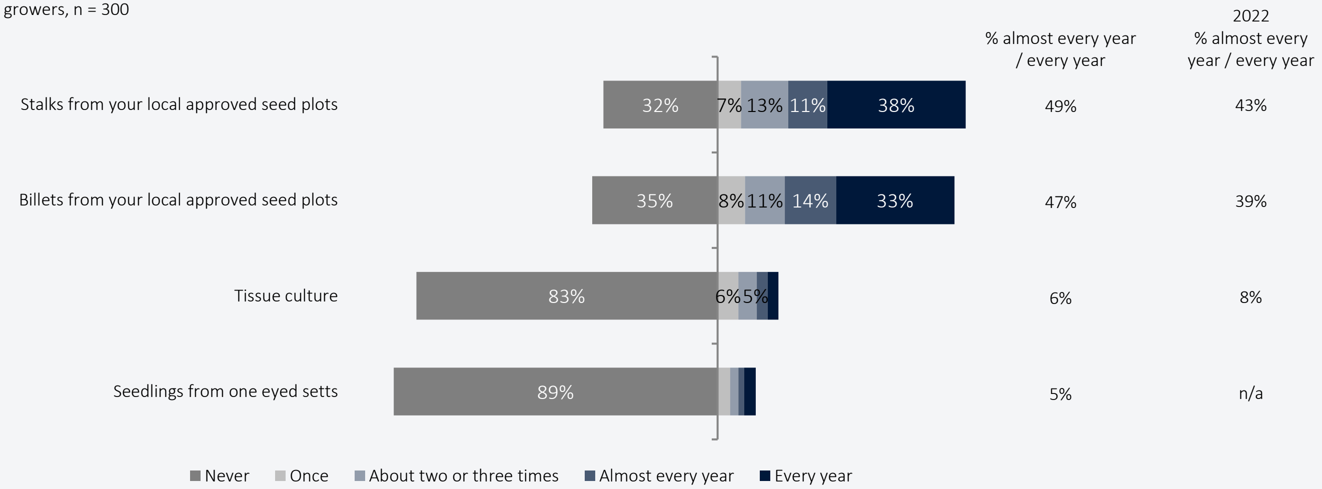
Perceptions about varieties

Frequency of planting methods in the last five years

The next set of questions relate to varieties and SRA's breeding program.

Q23. How often in the last five years have you planted using...

Base: All growers, n = 300



% almost every year / every year	District: Far North Queensland	District: Herbert	District: Burdekin	District: Central Queensland	District: Southern Queensland	District: New South Wales	Production Size: Small: 8,000 tonnes and under	Production Size: Medium: >8,000-20,000 tonnes	Production Size: Large: >20,000-50,000 tonnes	Production Size: Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
Stalks from your local approved seed plots	64%	60%	20%	57%	46%	11%	48%	54%	44%	58%
Billets from your local approved seed plots	41%	59%	63%	37%	39%	82%	43%	53%	63%	58%
Tissue culture	7%	2%	0%	7%	9%	7%	6%	6%	4%	25%
Seedlings from one eyed setts	0%	0%	0%	4%	17%	7%	5%	5%	0%	8%

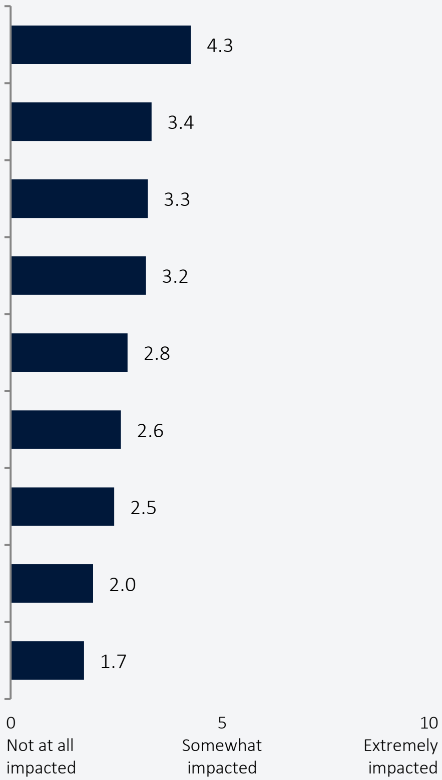
Result labels shown only if 5% or greater.

* Low sample size (n < 30). Results are indicative only.

Impacts on decisions to plant new varieties more often

Q24. To what extent have the following issues impacted your decision to plant new varieties more often?

Base: All growers who answered only using a planting method “once” or “never” for at least one of the listed methods (excluding “Can’t say” answers), n varies



		2022 Mean	% somewhat impacted (rating 5-10)	2022 % somewhat impacted (rating 5-10)
New varieties do not perform better than old varieties (n = 286)	4.3	4.9	56%	65%
Planting new varieties is too high risk compared to old varieties (n = 292)	3.4	3.6	43%	47%
Confusion about which variety to select for soil types (n = 290)	3.3	4.3	39%	52%
Supply of cane is limited and may be unavailable (n = 286)	3.2	4.0	41%	51%
Insufficient information about new varieties (n = 288)	2.8	3.8	34%	48%
Available information about new varieties is not clear or useful (n = 286)	2.6	3.7	31%	47%
Not enough time (n = 292)	2.5	2.8	32%	34%
Cost is too expensive (n = 290)	2.0	2.4	26%	29%
Planting is physically challenging (n = 291)	1.7	2.5	21%	31%

Impacts on decisions to plant new varieties more often

Q24. To what extent have the following issues impacted your decision to plant new varieties more often?

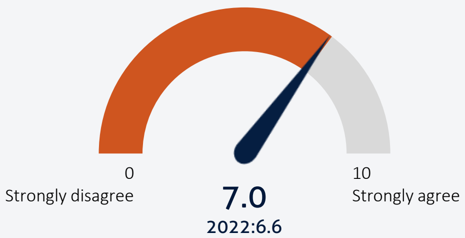
Base: All growers who answered only using a planting method "once" or "never" for at least one of the listed methods (excluding "Can't say" answers), n varies

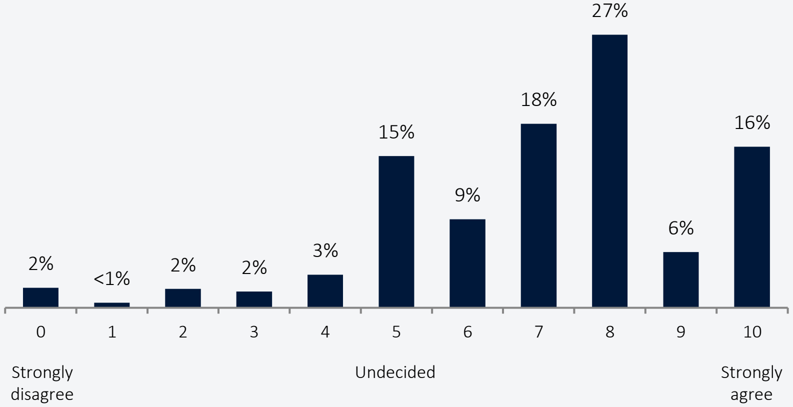
	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	52	34	40	98	40	18*	128	98	44	12*
New varieties do not perform better than old varieties	3.9	4.5	5.4	4.0	4.4	4.0	4.4	4.1	3.8	5.1
Planting new varieties is too high risk compared to old varieties	3.3	3.6	4.7	2.7	3.3	3.7	3.6	2.9	2.7	2.7
Confusion about which variety to select for soil types	3.3	4.2	3.6	2.9	3.1	3.1	3.3	2.9	4.1	2.3
Supply of cane is limited and may be unavailable	2.6	4.0	3.5	3.2	2.7	3.9	3.2	3.3	2.9	3.0
Insufficient information about new varieties	2.7	3.5	4.0	2.3	2.6	2.4	2.8	2.8	2.5	2.6
Available information about new varieties is not clear or useful	2.6	3.3	3.5	2.1	2.7	2.4	2.6	2.7	2.7	3.2
Not enough time	2.3	2.8	2.6	3.1	1.4	1.4	2.8	1.9	1.8	0.6
Cost is too expensive	1.7	2.7	2.6	2.0	1.4	1.2	2.3	1.5	0.8	1.4
Planting is physically challenging	1.6	2.5	1.6	1.7	1.8	1.4	2.0	1.3	1.0	0.6

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Agreeance on having access to the right technical information

Q25. Do you agree or disagree that you have access to the right technical information about variety performance in different conditions?
Base: All growers (excluding "Can't say" answers), n = 297





District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
7.0	6.9	6.9	7.5	6.4	6.6
n = 54	n = 34	n = 41	n = 105	n = 44	n = 19*

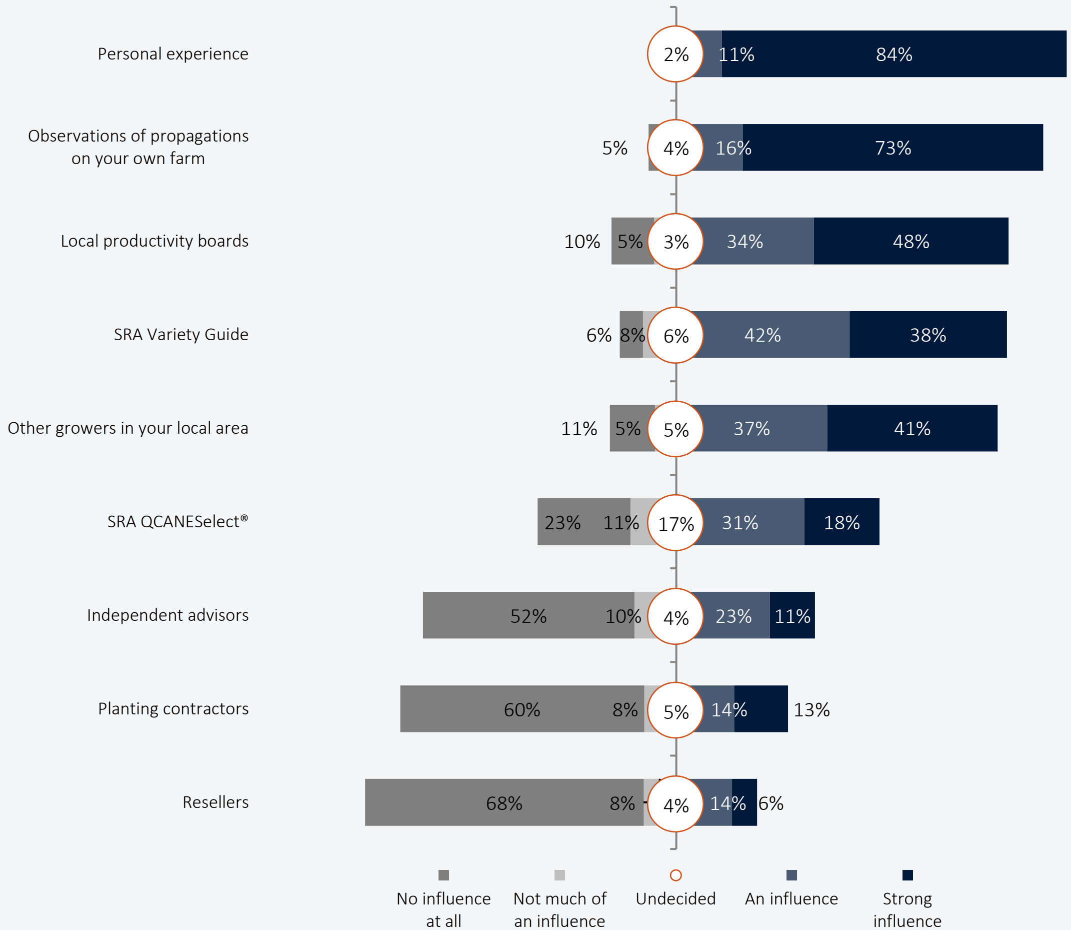
Production Category

Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
7.2	6.9	6.4	7.8
n = 134	n = 101	n = 48	n = 12*

* Low sample size (n < 30). Results are indicative only.

Influences of sources of information on planting new varieties

Q26. How much do the following sources of information influence your decision to plant new varieties?
Base: All growers, n = 300



	% not much / no influence	% some / strong influence	2022 % some / strong influence
Personal experience	3%	95%	97%
Observations of propagations on your own farm	7%	90%	n/a
Local productivity boards	16%	81%	83%
SRA Variety Guide	14%	81%	76%
Other growers in your local area	16%	78%	78%
SRA QCANESelect®	34%	50%	60%
Independent advisors	62%	34%	38%
Planting contractors	67%	27%	26%
Resellers	76%	20%	19%

Result labels shown only if 5% or greater.

Influences of sources of information on planting new varieties

Q26. How much do the following sources of information influence your decision to plant new varieties?
Base: All growers, n = 300

	District						Production Size			
% some / strong influence	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
Personal experience	93%	98%	96%	96%	91%	100%	94%	97%	100%	100%
Observations of propagations on your own farm	90%	96%	82%	89%	88%	100%	85%	98%	98%	100%
Local productivity boards	79%	91%	92%	84%	69%	66%	80%	83%	88%	75%
SRA Variety Guide	84%	94%	66%	76%	83%	93%	80%	82%	77%	83%
Other growers in your local area	69%	78%	76%	85%	75%	80%	79%	77%	77%	67%
SRA QCANESelect	55%	65%	32%	49%	46%	56%	49%	52%	50%	58%
Independent advisors	41%	26%	37%	36%	20%	47%	35%	31%	29%	25%
Planting contractors	36%	41%	44%	21%	16%	7%	33%	15%	15%	25%
Resellers	14%	29%	23%	22%	4%	40%	25%	10%	8%	8%

* Low sample size (n < 30). Results are indicative only.

Perceptions about varieties

Varieties intending to increase commercial production

Q27. What, if any, new varieties do you intend to increase commercial production of?

Base: All growers who provided a valid response, n = 300

70% - Listed an SRA# variety

3% - KQ228
1% - SP80-1816
<1% - SRA1
1% - SRA2
3% - SRA6
<1% - SRA7
20% - SRA9
3% - SRA11
2% - SRA12
<1% - SRA13
4% - SRA15
1% - SRA16
3% - WSRA17
2% - SRA19
2% - SRA20
7% - SRA21
7% - SRA22
5% - SRA23
30% - SRA26
<1% - SRA27
16% - SRA28
8% - SRA29
1% - SRA30
1% - SRA31
4% - SRA32
2% - SRA33
1% - SRAW33
2% - SRA34
4% - SRA36
6% - SRA37
1% - SRA39

21% - Listed a Q# variety

1% - Q138
<1% - Q155
4% - Q183
<1% - Q190
2% - Q200
8% - Q208
<1% - Q218
2% - Q232
6% - Q240
1% - Q242
<1% - Q247
1% - Q250
2% - Q252
9% - Q253
1% - Q254

Other answers provided

12% - Not sure / Don't know

10% - None, no plans

2% - Intend to, but do not recall numbers / codes

A slightly different question was asked in 2022 regarding intention to plant for the first time.

68% of growers in 2023 reported a variety classed as “new” (SRA9 or later), compared to 46% in 2022.

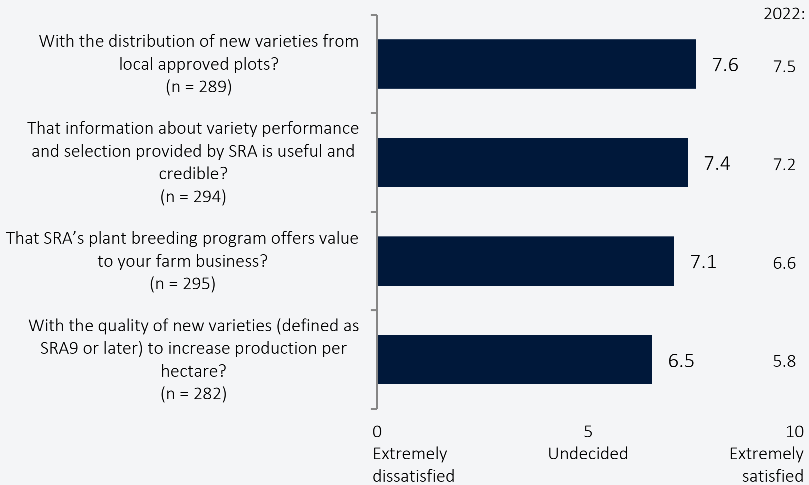
Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Perceptions about varieties

Satisfaction with SRA's plant breeding program

Q28. Regarding SRA's plant breeding program, overall how satisfied are you...

Base: All growers (excluding "Can't say" answers), n varies



7.2

2022: 6.8

Average of the four satisfaction ratings

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	50	32	40	101	41	18*	123	100	44	11*
With the distribution of new varieties from local approved plots?	7.2	7.6	7.1	8.1	7.4	7.9	7.6	7.7	7.7	7.1
That information about variety performance and selection provided by SRA is useful and credible?	7.3	7.3	6.9	7.9	7.0	7.5	7.5	7.4	7.1	7.1
That SRA's plant breeding program offers value to your farm business?	7.0	6.7	6.7	7.5	6.8	7.2	7.1	6.9	7.2	6.8
With the quality of new varieties (defined as SRA9 or later) to increase production per hectare?	6.6	5.7	6.5	7.1	5.8	7.2	6.6	6.4	6.5	5.6

* Low sample size (n < 30). Results are indicative only.

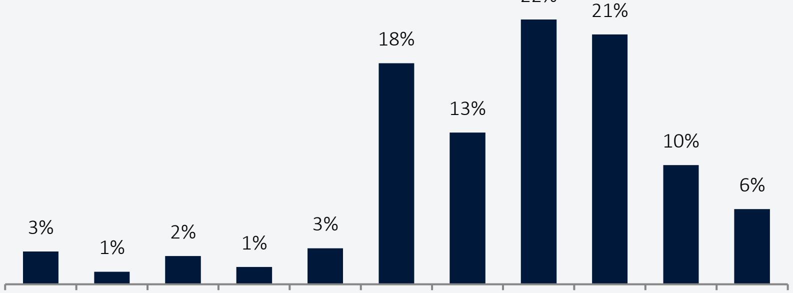
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Detailed results

Performance indicators

Satisfaction with R&D levy investment

Q37. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?
Base: All growers (excluding “Can't say” answers), n = 286



District

6.6	6.8	6.5	7.0	5.9	5.9
2022: 5.7	2022: 6.5	2022: 6.3	2022: 6.2	2022: 5.8	2022: 6.3
Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
n = 50	n = 33	n = 39	n = 103	n = 43	n = 18*

Production Category

6.8	6.3	5.8	5.5
2022: 6.3	2022: 5.9	2022: 5.6	2022: 6.2
Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
n = 128	n = 98	n = 46	n = 12*

* Low sample size (n < 30). Results are indicative only.

Satisfaction with R&D levy investment

Q37. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?
Base: All growers (excluding "Can't say" answers), n = 286

	Sat with R&D levy
Familiarity with SRA's district plans	
Familiar (n = 135)	7.0
Not familiar (n = 151)	6.3
Activity of SRA staff are in engaging in industry matters and events in your district	
Active (n = 192)	7.1
Not active (n = 59)	5.0
Intentions for farm business over the next five years	
Improve my farm productivity through increased investment (n = 78)	6.3
Improve my farm productivity but not invest heavily (n = 81)	6.6
Maintain farm productivity – keep to current production (n = 78)	6.5
Reduce the area under cane to transition to other cropping and / or grazing (n = 10)	6.1
Transition to retirement and / or wind down operations / selling farm (n = 39)	7.2

* Low sample size (n < 30). Results are indicative only.

Recommendations for SRA to improve their outcomes

Q38. What is your strongest recommendation you would have to SRA to improve the outcomes it achieves through its investment and management of the R&D?
Base: All growers who provided a valid response, n = 300

18% - Invest in better varieties / testing of new varieties

13% - Nothing

13% - Feedback related to SRA

11% - Improved / better / new varieties (no further info)

9% - Listen to growers / more growers

8% - More research: diseases, pests, weeds

8% - Better engagement

7% - More research: other areas

6% - Keep going what they are doing

6% - More localised research / comms / engagement

5% - Improved communication

4% - Focus on productivity and profitability

4% - More research: soil

3% - Miller / milling feedback

3% - Stronger uptake of research

2% - Better extension programs

Some of what growers said:

“Oh probably if they could make QSelect a lot better than what it is because I can’t get any useful recommendations on variety from it. I would appreciate that being better. If I could put in my soil type and things like that and give me a range of varieties. I’ve tried it, no matter what I do it will give me the same varieties so it’s completely useless to me."

“They need to get onto breeding some decent cane varieties. Q124 it was really good cane, then Gov let orange rust come through on the rubber vine and it affected and wiped out the Q124. Q204 was another good one, then they went off red canes and went to yellow, and they have not been successful. I don’t know why they went off red cane!"

“Wild pigs are a problem for us. They destroy cane and dig holes. They also need to stop allowing cane to be grown where there is itch grass, i.e. subsidise farmers not to grow cane until itch grass is eradicated; the seeds are spreading through the cane. I am dyslexic and would appreciate more information via audio and video channels."

"Need new varieties and better ones in our district to improve productivity, had to go back to SRA9 but that has low sugar content. No good new ones released in our area for 5 years and no early varieties for much longer."

“Focus on more than just producing a new variety of sugar cane to put in the ground. Focus on a stick of cane that can go in the ground so can grow a crop that will produce for longer, have higher sugar content and be easier to harvest and a cane that can be used to produce more than just sugar."

"Its about prioritising the right things that farmers really want; that is varieties, pests & disease and biosecurity and also the relationship from growing to milling - influencing the milling sector to benefit the growers along the lines of productivity, season length, cane analysis programs."

“Don't expect all the farmers to take up new technology immediately. Stop saying all farmers are getting $800 a tonne when they are not & for those that are getting $500 a tonne it is depressing."

“Meaningful consultation with the miller and growers is what is needed. They need to stand in front of 30 growers face to face - the way they should communicate is face 2 face. They need to get out and face us."

"More disease resistant varieties, more R7D and more high yield. We have to keep accelerating the varieties, breeding and testing back to 208. Need more variety for early harvest and more variety for late harvest. And with Weed Management more guinea grass and balsam pear control options."

"There is not a lot of support provided to small growers for the record keeping side of things. It would be good to have detailed information on what has to be kept as a record, there are existing templates but more guidance would help and updates on changes when they occur."

"More focus should be on multiple rows of harvesting and automating all levels of the sugar growing process, in particular irrigation and automation of irrigation cleaning retrieval and laying out. Labour saving in other words, is one of the biggest problems i.e. profitability."

“They go into partnership with other organisations to do research, but I am concerned that the outcome or result published is compromised by the requirements of the funding source - so how to keep bias out of the results regardless of the funding source."

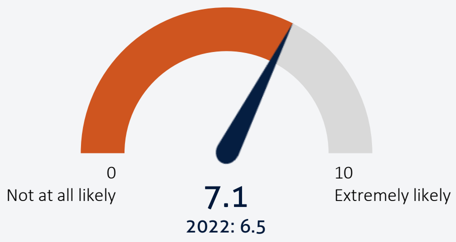
“Focus on developing varieties that have high sugar content and high tonnage. Address reliability of mill operations - so that they are operating & processing so we can get the crop off in a timely manner, so we are not cutting in December & January."

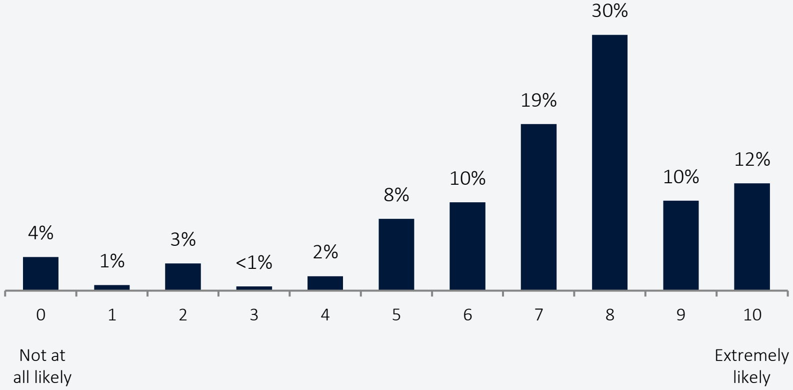
Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Advocacy of the services, products and information SRA provide

Q39. How likely is that you would recommend the services, products and information SRA provides to other growers or industry associates?

Base: All growers (excluding "Can't say" answers), n = 289





District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
7.1	7.8	6.1	7.3	6.6	7.2
2022: 5.7	2022: 7.2	2022: 6.6	2022: 6.4	2022: 6.4	2022: 6.7
n = 52	n = 33	n = 39	n = 102	n = 44	n = 19*

Production Category

Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
7.2	7.0	5.9	6.4
2022: 6.4	2022: 6.7	2022: 6.5	2022: 6.2
n = 133	n = 97	n = 45	n = 12*

* Low sample size (n < 30). Results are indicative only.

Net Promoter Score

Net Promoter Score

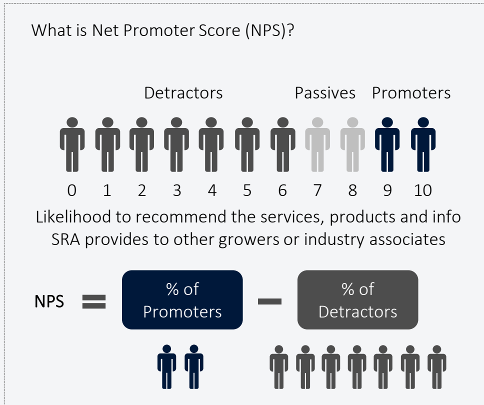
Base: All growers (excluding "Can't say" answers), n = 289

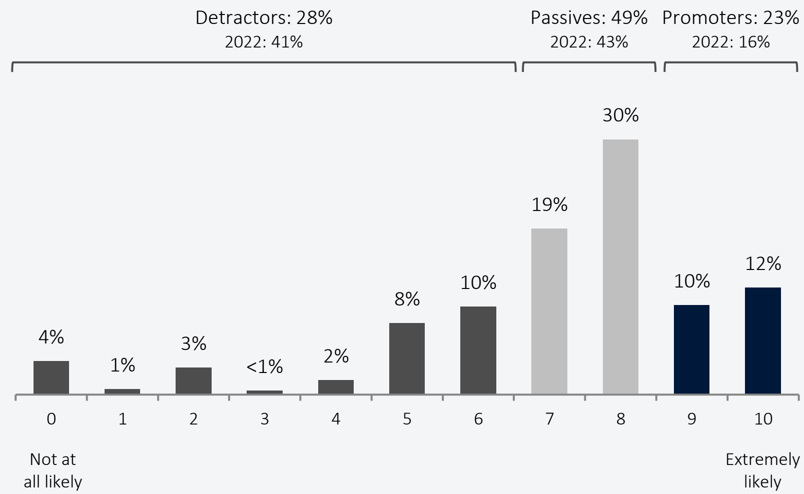
-6

2022: -25

on a scale of -100 to +100

Net Promoter Score





District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
-5	**+20**	**-36**	**+1**	**-10**	**-12**
2022: -49	**2022: -4**	**2022: -12**	**2022: -29**	**2022: -37**	**2022: -15**
n = 52	n = 33	n = 39	n = 102	n = 44	n = 19*

Production Category

Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
+2	**-19**	**-33**	**-8**
2022: -25	**2022: -27**	**2022: -26**	**2022: -33**
n = 133	n = 97	n = 45	n = 12*

* Low sample size (n < 30). Results are indicative only.

Areas of investment for additional research

Q40. If SRA had more funding and could invest in additional research, which areas would add the most value to your farm business?
Base: All growers who provided a valid response, n = 249

8% - Nothing / nothing comes to mind

48% - Variety-related

- 16% - Varieties (no further info)
- 6% - Prioritisation of plant breeding
- 6% - Better varieties
- 5% - More productive varieties
- 4% - More resistant varieties - weather, pests, etc.
- 4% - Locally-specific varieties
- 4% - More varieties
- 2% - Less demanding varieties (less fertiliser, nutrients, etc.)
- 2% - Longer lasting varieties

50% - Other factors

- 11% - Increase profitability / productivity
- 10% - Pests / weeds / disease research / control
- 8% - Alternative use for cane / by-products
- 7% - Soil research / health
- 6% - Irrigation / water
- 5% - Feedback about SRA
- 3% - Research around feritlisers
- 2% - Research around farm systems and technology
- 2% - Research around nutrients

Some of what growers said:

“Probably technology that shortens the time of cane breeding from initial cross to release. Wilmar are starting to experimenting with DNA testing where they can short track some of it, sounds promising."

"Better varieties that have good sugar content & high yield that can grow on sandy or poorer soils & marginal country NOT just ones that grow in good soil, need to do trials on other soil types not just good soils. The new varieties lately seem to be only for the good soils, nothing that is good on sand, options are too limited at present."

"Varieties - keep producing more to get the increase in productivity, higher yielding varieties with less inputs required, improved net returns. Also need to keep on top of the harvesting side of things - main harvesting methods haven't changed for over 30 years, aim to get a clean product out of the harvest in all conditions."

"Information on new varieties do not have enough data or it is not available, until it has been tested for three or four years. More testing needs to be done before they are released; the longer-term return and soil suitability is information that is lacking."

“Diversification - in terms of other products from the crop, even though SRA is funded through miller and grower, the diversification aspect should have some focus on products that do not require miller involvement, e.g. cane trash for mulch, it can be direct benefit for the grower."

"Plant breeding & soil health - what goes on under the ground, what can we do, plant health under the ground; is this an issue with the plant breeding program e.g. focusing more on sugar rather the strength and longevity of the plant - the ratoonability."

"Well, it is a lot of things like varieties, soli health, pest and disease and nutrition in that order I think the varieties they have the opportunity, SRA are the only one who provide varieties, the other things you can get it from other sources."

"New markets, other than just sugar. If we could find an industry where we could utilise cane and harvest it all year round, rather than for sugar content, it would be a good thing; not only for the farmers, but also for contractors."

"Product diversification if using one product through the same mills, the bottom value is not going to increase. If they are using the same old century we are not going to grow. we can grow hem, etc. Not only sugar."

“Development of more varieties suited to our specific area; ones that are resistant to frost and can handle both drought and wet conditions and ratoons well, looking for something with early sugar."

“Varieties, e.g. getting varieties to grow in dry conditions. Genetic modification, if you could work out the genetic makeup of a variety that grows in dry conditions, get a super variety."

"A little more on soil health, well by law we need to these soil tests on your property, but we find it hard to interpret the soil tests because no one come to interpret the soil."

"After orange rush it was hard to get a variety in 2000, we had to learn to farm differently, if they could research that, they need more done to make more products made by cane."

"New concept of making different products out of sugar cane - move towards getting these things into production - to have that secondary option when the sugar price drops.”

“Got a problem with soldier fly and there's no chemical to kill them so that would be good."

“Nutrient side of things - to do more trials with different kinds of fertiliser. We also need more varieties for marginal country and sodic & clay soils."

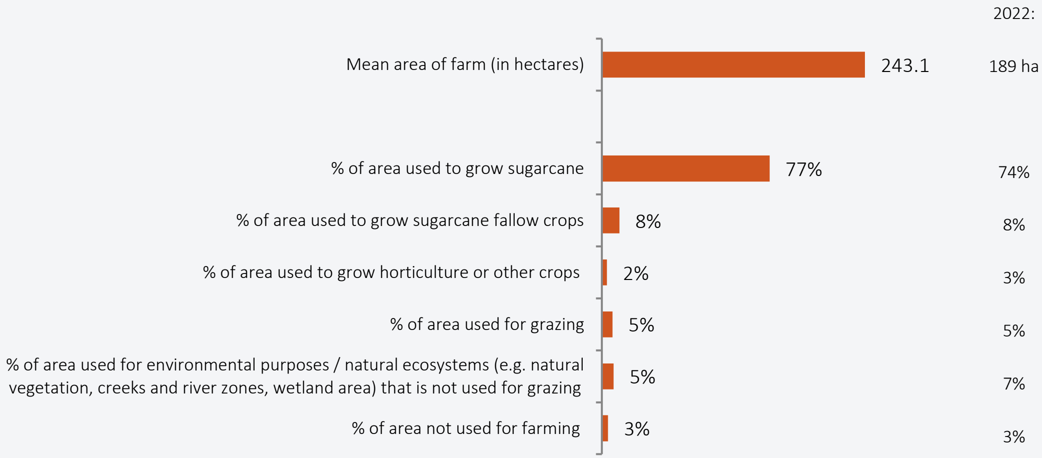
Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Detailed results

Farm business profile

Area of farm and allocated breakdown

Q41 and Q42. What is the total area of your farm in hectares? And during 2022-23, approximately how many hectares of your farm was devoted to the following?
Base: All growers who provided a valid response, n = 298 (n = 2 did not answer)



The "% of area" results are an average of the proportion of area each grower reported against their total farm hectares.

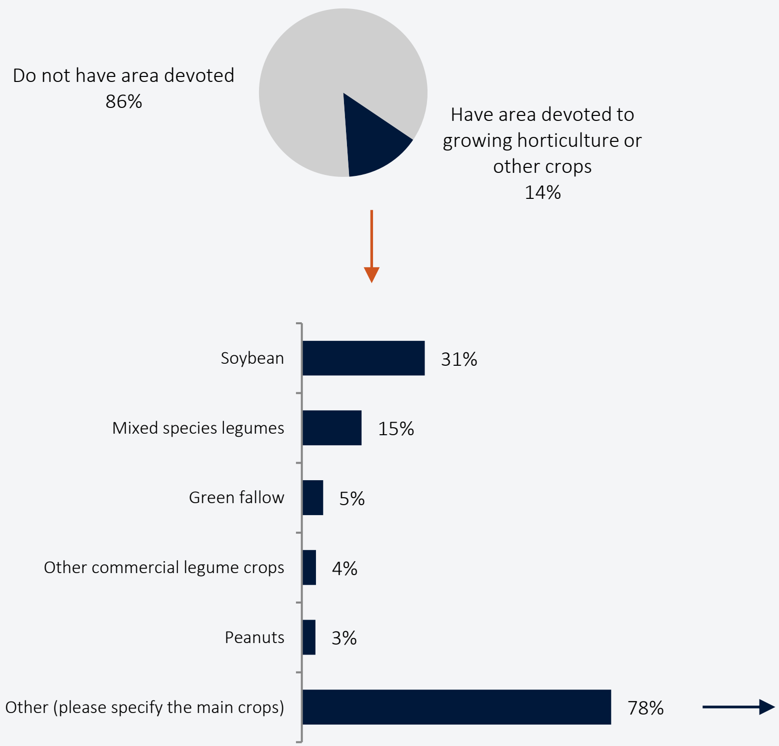
This standardisation to a 0-100% scale is done to provide results that are unbiased to growers with a significantly larger area.

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*53*	*35*	*41*	*105*	*45*	*19**	*135*	*102*	*48*	*12**
Mean area of farm (in hectares)	154	175	580	216	217	173	120	381	632	2,183
% of area used to grow sugarcane	79%	82%	81%	75%	69%	75%	76%	76%	77%	78%
% of area used to grow sugarcane fallow crops	8%	8%	6%	8%	8%	13%	8%	8%	8%	11%
% of area used to grow horticulture or other crops	1%	0%	5%	1%	6%	1%	3%	2%	3%	2%
% of area used for grazing	2%	1%	3%	7%	7%	6%	5%	4%	5%	3%
% of area used for environmental purposes / natural ecosystems	7%	3%	2%	6%	8%	2%	5%	6%	3%	4%
% of area not used for farming	2%	5%	2%	3%	3%	3%	2%	4%	4%	2%

* Low sample size (n < 30). Results are indicative only.

Other crops / foods grown on farm during 2022-23 season

Q43. What other crops and / or foods did you grow on your farm during the 2022-23 season?
Base: All growers who reported having area used to grow horticulture or other crops, n = 43



Other crops mentioned:

"Agricultural hemp."
"Asian vegetables."
"Bananas, avocado."
"Chilli and capsicum."
"Cocoa beans."
"Cotton."
"Forage sorghum, winter oats, lablab."
"Ginger"
"Grain crops and beans, mung beans, corn and maize and sorben."
"Hay."
"Hemp."
"Lablab."
"Macadamia."
"Macadamias."
"Macadamias."
"Maize"
"Mangoes."
"Mungbean."
"Papaya."
"Pecans."
"pineapple."
"Pineapples."
"Pumpkins."
"Pumpkins."
"Pumpkins, cut flowers"
"Rose grass, humidicola and micong grass."
"Strawberries, zucchini, peas, capsicum."
"Sunflowers."
"Sweet potatoes."
"Triticale, forage hemp, forage sorghum."
"Vegetables."
"Veggies - pumpkin & zucchini."
"Watermelons."
"Watermelons, pumpkins."

Sugarcane harvested, yields and CCS

Q44. Approximately how many tonnes of sugarcane did you harvest and what were your yields in 2022-23?

Base: All growers who provided a valid response, n varies *

	Mean result across all growers	2022:
Total tonnes of sugarcane harvested (in tonnes, n = 295):	9,503	8,937
Average farm yield (in tonnes / hectare, n = 264):	94	87
Average farm CCS (Commercial Cane Sugar %, n = 274):	13.0	13.3
Yield recorded by your highest-yielding block (in tonnes / hectare, n = 255):	128	121
Yield recorded by your lowest-yielding block (in tonnes / hectare, n = 257):	67	65

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*46*	*30*	*35*	*90*	*41*	*12**	*108*	*88*	*46*	*12**
Total tonnes of sugarcane harvested	9,629	9,033	13,497	8,675	9,220	7,514	4,110	12,233	30,204	142,875
Average farm yield	90	94	131	88	91	73	89	102	102	104
Average farm CCS	12.5	11.5	13.7	13.2	13.6	12.2	13.0	12.9	13.0	13.3
Yield recorded by your highest-yielding block	114	117	163	127	128	130	121	139	146	161
Yield recorded by your lowest-yielding block	67	69	98	61	60	46	63	73	77	70

* Cleaning was undertaken on this data to ensure outlier results, results where growers were unsure, etc. were removed prior to analysis.

** Low sample size (n < 30). Results are indicative only.

† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Intentions with the farm business

Q45. Over the next five years, which of the following options best describes your intentions with your farm business?
Base: All growers, n = 300

25%
2022: 20%
Improve my farm productivity through increased investment

25%
2022: 29%
Improve my farm productivity but not invest heavily

30%
2022: 30%
Maintain farm productivity – keep to current production

3%
2022: 3%
Reduce the area under cane to transition to other cropping and / or grazing

16%
2022: 19%
Transition to retirement and / or wind down operations / selling farm

Intentions for farm business over the next five years

	District						Production Size			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*54*	*35*	*42*	*105*	*45*	*19**	*136*	*102*	*48*	*12**
I intend to improve my farm productivity through increased investment (i.e. maximise return on investment)	24%	20%	36%	27%	19%	18%	22%	30%	31%	58%
I intend to improve my farm productivity but not invest heavily (i.e. improve using inexpensive means)	25%	32%	20%	22%	20%	45%	21%	33%	35%	33%
I intend to maintain farm productivity – keep to current production (i.e. hold steady)	33%	38%	15%	27%	39%	37%	35%	19%	29%	8%
I intend to reduce the area under cane to transition to other cropping and / or grazing	3%	0%	1%	4%	9%	0%	4%	3%	4%	0%
I intend to transition to retirement and / or wind down operations / selling farm	14%	10%	28%	20%	13%	0%	18%	15%	0%	0%

* Low sample size (n < 30). Results are indicative only.

Appendices

A profile of results: by District

	Far North Queensland (n = 54)	Herbert (n = 35)	Burdekin (n = 42)	Central Queensland (n = 105)	Southern Queensland (n = 45)	New South Wales (n = 19*)
Satisfaction with R&D levy investment	6.6	6.8	6.5	7.0	5.9	5.9
Advocacy of the services, products and information SRA provide	7.1	7.8	6.1	7.3	6.6	7.2
Net Promoter Score	-5	+20	-36	+1	-10	-12
Familiar with SRA's Strategic Plan 2021-2026	27%	39%	16%	30%	29%	22%
Satisfaction with SRA's Strategic Plan 2021-2026	6.8	7.4	7.6	6.8	6.0	7.0
Familiar with SRA's research investment planning	20%	41%	28%	38%	42%	26%
Satisfaction with SRA's research investment planning	6.4	7.5	7.5	7.0	6.7	5.5
Familiar with SRA's district plans	45%	64%	36%	47%	39%	40%
Satisfaction with SRA's district plans	6.8	7.4	6.8	6.8	6.6	6.1
% believe SRA staff are active or very active in engaging in industry matters and events in your district	68%	82%	63%	73%	50%	42%
Satisfied with the quality of SRA communications for providing useful and credible information	7.3	7.5	7.2	7.6	7.0	7.3
Ease of using the info from SRA research reports to make changes to their sugarcane farming business	6.4	7.4	6.8	6.9	6.4	6.5
Mean agreeance that they have access to the right technical info about variety performance in different soil types / conditions	7.0	6.9	6.9	7.5	6.4	6.6

Bases reported are the overall base of each cohort. Bases will differ by measure.
* Low sample size (n < 30). Results are indicative only.

A profile of results: by Production Size

	Small: 8,000 tonnes and under (n = 136)	Medium: >8,000-20,000 tonnes (n = 102)	Large: >20,000-50,000 tonnes (n = 48)	Extra Large: Over 50,000 tonnes (n = 12*)
Satisfaction with R&D levy investment	6.8	6.3	5.8	5.5
Advocacy of the services, products and information SRA provide	7.2	7.0	5.9	6.4
Net Promoter Score	+2	-19	-33	-8
Familiar with SRA's Strategic Plan 2021-2026	26%	31%	29%	33%
Satisfaction with SRA's Strategic Plan 2021-2026	7.0	6.5	6.2	6.5
Familiar with SRA's research investment planning	37%	31%	17%	25%
Satisfaction with SRA's research investment planning	7.2	6.2	6.1	7.0
Familiar with SRA's district plans	45%	47%	54%	33%
Satisfaction with SRA's district plans	7.1	6.5	6.0	6.5
% believe SRA staff are active or very active in engaging in industry matters and events in your district	65%	70%	58%	67%
Satisfied with the quality of SRA communications for providing useful and credible information	7.5	7.2	6.4	6.4
Ease of using the info from SRA research reports to make changes to their sugarcane farming business	6.9	6.5	6.6	6.0
Mean agreeance that they have access to the right technical info about variety performance in different soil types / conditions	7.2	6.9	6.4	7.8

Bases reported are the overall base of each cohort. Bases will differ by measure.
* Low sample size (n < 30). Results are indicative only.

A profile of results: by Business Intention

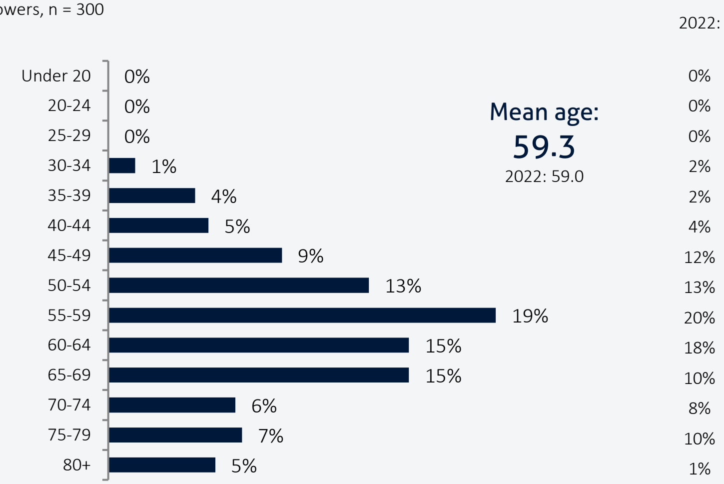
	Improve - increased investment (n = 83)	Improve – not invest heavily (n = 83)	Maintain farm productivity (n = 83)	Reduce area to transition to other (n = 10*)	Transition to retire / wind down / sell (n = 41)
Satisfaction with R&D levy investment	6.3	6.6	6.5	6.1	7.2
Advocacy of the services, products and information SRA provide	7.0	6.9	7.1	6.3	7.5
Net Promoter Score	-10	-3	-7	0	-2
Familiar with SRA's Strategic Plan 2021-2026	33%	24%	30%	7%	28%
Satisfaction with SRA's Strategic Plan 2021-2026	6.9	7.3	6.5	6.0	6.8
Familiar with SRA's research investment planning	40%	23%	34%	43%	38%
Satisfaction with SRA's research investment planning	7.2	7.4	6.6	6.0	6.8
Familiar with SRA's district plans	50%	43%	45%	43%	46%
Satisfaction with SRA's district plans	6.9	7.3	6.4	6.8	6.9
% believe SRA staff are active or very active in engaging in industry matters and events in your district	63%	67%	66%	68%	70%
Satisfied with the quality of SRA communications for providing useful and credible information	7.4	7.0	7.5	7.5	7.5
Ease of using the info from SRA research reports to make changes to their sugarcane farming business	6.9	6.6	6.8	6.8	6.9
Mean agreeance that they have access to the right technical info about variety performance in different soil types / conditions	7.1	7.0	6.9	6.4	7.6

Bases reported are the overall base of each cohort. Bases will differ by measure.
* Low sample size (n < 30). Results are indicative only.

Respondent profiles

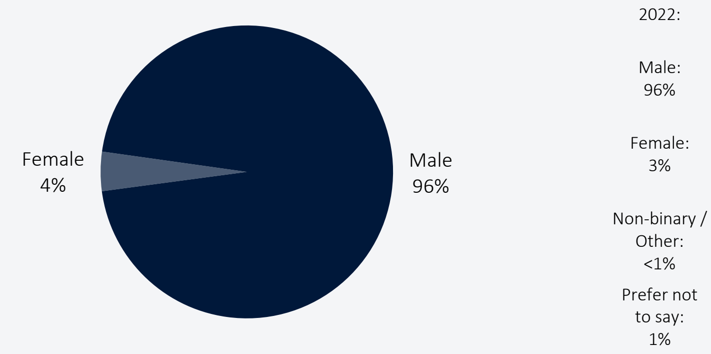
Q1. Which age range do you fall into? *

Base: All growers, n = 300



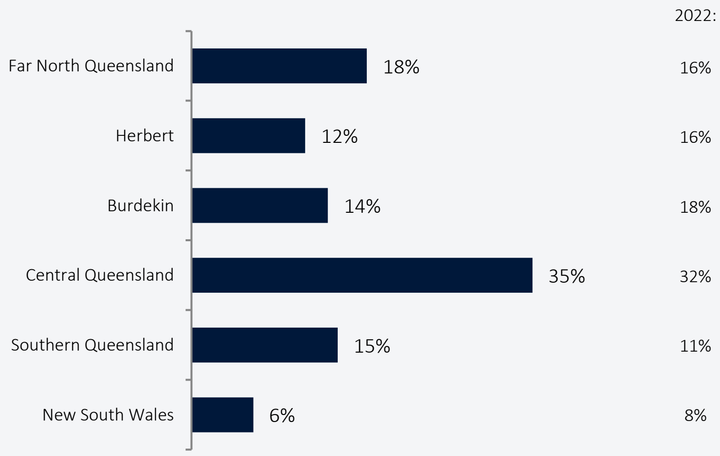
Q2. Which gender do you associate with? *

Base: All growers, n = 300



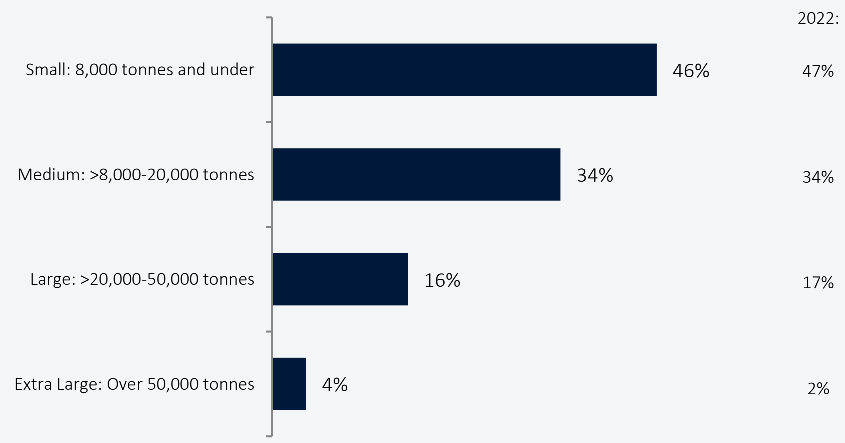
District of respondent *

Base: All growers, n = 300



Production Category of respondent *

Base: All growers, n = 298 (n = 2 could not provide total tonnes of sugarcane harvested, hence could not be categorised)



* Results are provided unweighted.

Appendices

Research design

Research Program

Sugar Research Australia (SRA) invests in evidence-based research, development and adoption (RD&A) activities on behalf of sugarcane growers and millers to meet industry challenges and opportunities. Central to achieving success of the SRA strategic plan is the engagement, support and advocacy of the two key stakeholder audiences, namely growers and millers.

Target Respondent

The 2023 SRA Grower Survey provides another opportunity to stop, listen and reflect on the level of grower awareness and engagement with SRA programs, communications and initiatives and their satisfaction with the outcomes being delivered through the SRA investments.

Questionnaire

The target respondent for this research is levy-paying Australian sugarcane growers. Due to the availability of contact details, this target is limited to SRA members only.

A 30-minute phone survey was conducted with respondents. This survey measured, amongst other things:

- Grower sentiment
- Organisational reputation
- Perceptions of district engagement
- Experiences with SRA products and services
- Perceptions about varieties
- Perceptions about research portfolio
- Communication needs and experiences
- Performance indicators
- Farm business profile
- Voice of the grower

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to accomplish this.

Distribution

The survey was distributed to growers via computer-assisted telephone interviewing (CATI). The survey method utilised SRA's internal list with contact details

Response

Throughout the survey period, n = 300 sugarcane growers responded and completed the survey. A breakdown of the total number of completes by District and by Production Size is provided below.

Overall	District						Production Size			
Total completes	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
300	54	35	42	105	45	19	136	102	48	12

Weighting

The results of the research used a similar weighting structure to that used in 2022 – the results were weighted back to match the SRA membership base by Production Size (District breakdown was similar enough to the membership base to not warrant any further weighting). Please note that this weighting does not match any weighting used in research before 2022 due to a shift in the definitions of the Production Size categories.

Timing

The survey was open for response on 9th May 2023 and remained open until 26th May 2023.

For further information, please contact:

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