

# 2024 Miller Survey

A survey of milling companies

November 2024

Deidentified Version



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## Context

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 Millers. A separate report is provided to outline the feedback provided by Growers.

## The research design

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

1. Measure and report on Miller understanding, engagement and satisfaction with the range of services, support, and RD&E delivered by SRA.
2. Utilise this and other available information to build insights into the Miller experience, needs and expectations and experiences with SRA. Describe opportunities to strengthen the relationship, expand the engagement and increase Miller satisfaction.

Feedback from Millers was sought from representatives across each of the eight milling companies. SRA provided a list of potential respondents to the survey, from each milling company. This included a range of different roles in many of the milling companies, from CEO through to other senior executive and operational management positions. There was then the opportunity for more than one representative from each milling company to complete the survey.

The process involved the collection of feedback through computer-assisted telephone interviewing (CATI) surveys.

In total across the research period, n = 26 representatives from the eight milling companies responded and completed the survey between 23<sup>rd</sup> October 2024 and 18<sup>th</sup> November 2024.

# The report provides company-level results

## Estimates provided in this report

As noted above, more than one representative from each of the eight active milling companies were invited to provide feedback through the Miller survey.

With not all invitees taking up the opportunity, the survey achieved:

- A total of  $n = 26$  responses from the 32 people invited to provide feedback.
- Of the eight milling companies:
  - 1 milling company had seven respondents to the survey;
  - 1 milling companies had five respondents;
  - 3 milling companies had three respondents;
  - 2 milling companies had two respondents; and
  - 1 milling company where several internal representatives contributed to providing a single response for the company.

The report than provides coverage of feedback from all eight active milling companies.

To ensure the results were balanced and not overweighted to those companies where there was a higher number of respondents, it was agreed with SRA that an 'company' average would be estimated for those milling companies where more than one respondent provided feedback. This methodology was also utilised in the 2022 and 2023 research.

Where a milling company had more than one person responding to the survey, an average of all responses provided by respondents of that milling company was calculated. This involved:

- Calculating a simple arithmetic mean for questions where there were rating responses required; and
- For other question formats, reflecting the range of responses within milling companies that had more than one person responding. The variations in responses to questions within a milling company were included in the estimates for the results overall.

So while there were some  $n = 26$  people who responded to the survey, the report will indicate a sample size of eight milling companies.

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



# Observations and insights

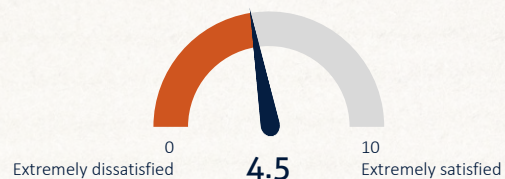


# 2024 Miller Survey

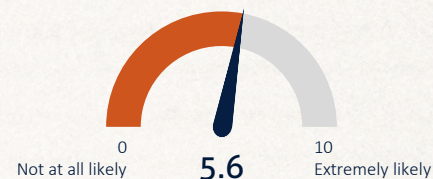
We spoke to 26 representatives across 8 active milling companies - this is a summary of their feedback.

## Performance indicators

### Satisfaction with R&D levy investment



### Advocacy of the services, products and information SRA provide



## Level of urgency for SRA to fund research addressing priorities

### Average % of high urgency within each program



### Top five priorities rated by level of high urgency

- #1 - 91% - Create new varieties with improved production and processing performance
- #2 - 70% - Invest in a highly skilled and professional workforce
- #3 - 65% - Support correct variety adoption decisions through performance information, grower engagement, and availability of planting material
- #4 - 64% - Biosecurity preparedness
- #5 - 61% - Develop new traits, improve breeding efficiency, and fund new PhDs in plant breeding

## Other notable measures



**+89**

Nett Sentiment about the future of the Australian sugarcane industry over the next 12 months



**40%**

% rating very active or active in their perception of SRA staff engaging in industry matters and events in the districts where their mills operate



**5.3**  
out of 10

Average satisfaction across four aspects of the experience with local SRA staff \*  
(scale of 0 = Extremely dissatisfied to 10 = Extremely satisfied)



**6.1**  
out of 10

Average satisfaction across four aspects of SRA's plant breeding program \*  
(scale of 0 = Extremely dissatisfied to 10 = Extremely satisfied)

The 2024 Miller Survey provided representatives from the eight active milling companies the opportunity to provide SRA feedback. Feedback was sought on a range of the experiences and satisfaction with their interaction, engagement and experiences with SRA and their assessment of, the outcomes achieved by SRA.

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

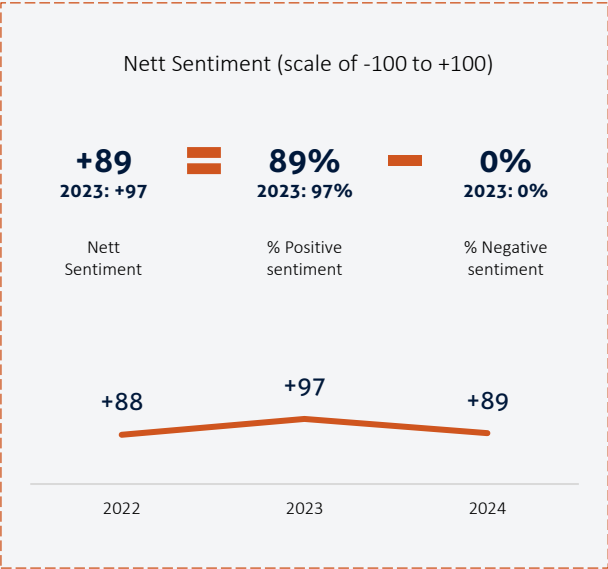
### Millers are confident about the future

In 2024, milling companies remain upbeat about the future of the Australian sugarcane industry over the next 12 months. While positive in their outlook, the strength of millers’ outlook is weaker than that reported in 2023.

Almost all millers reported having a positive perspective on the future, with 26% reporting being ‘very positive’ about the future (down from 51% in 2023). The 2024 nett sentiment of +89 is slightly below that reported in 2023 (+97) but consistent with the 2022 result (+88).

The result from millers is stronger than that reported by growers (+54) suggesting a much more buoyant outlook among millers.

Clearly the operating conditions, global markets and current prices have encouraged this very positive sentiment towards the future.



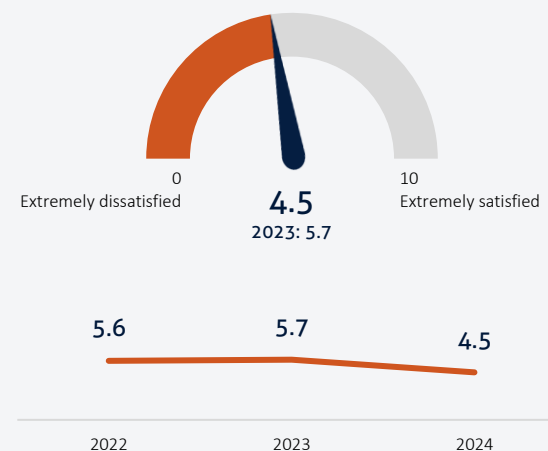
## Miller satisfaction with their experiences with SRA

Based on the feedback provided, milling companies reported an overall satisfaction of 4.5 (on a rating scale of 0 – 10). This was lower than the last two years results (5.6 and 5.7). Based on the ratings provided, we note that:

- At a company level, ratings ranged from 2.0 to 6.7. This compares to a range rating in 2023 of 3.5 to 7.6.
- At the representative level:
  - n = 4 miller representatives (15%, down 4% on 2023) rated their satisfaction strongly (at 8, 9 or 10);
  - n = 15 miller representatives (23%, down 26%) provided a modest rating (6 or 7); while
  - n = 10 miller representatives (62%, up 30%) rated between 0 to 5.

The range of ratings likely reflects different awareness, knowledge, involvement and experiences with SRA. It's clear from these results that not all milling company representatives share the same perspective of, and experience with SRA.

The result points to an interesting challenge for SRA – how to achieve a balance in engagement across the various levels within milling companies.



Other insights

The feedback from milling companies identified several other areas of interest, including:

- There remains a cohort of more critical milling company representatives.

Just over three in five respondents rated their overall satisfaction at 5 or less. It is clear from the analysis shown opposite that this cohort:

- were far less likely to indicate SRA staff were active in local industry matters;
- were more critical of SRA’s engagement with them on research priorities; and
- were critical of SRA’s current investment in the Small Milling Research Projects.

- The feedback in 2024 suggests fewer millers believe that SRA local staff are active in engaging in industry matters and events. This result is consistent with the feedback provided by growers and indicates there is an opportunity for local SRA staff to be more visible and present with milling staff and growers.

As noted in the grower survey report, this may be a capacity and resourcing issue. Regardless, it appears to have had a negative impact on miller ratings.

- Millers, like growers, have been more critical of the varieties and plant breeding programs in the 2024 surveys.
  - Almost all millers responding to the survey indicated that creating new varieties with improved production and processing performance was a high priority for research investment
  - Satisfaction with the plant breeding program (an average of 4 individual measures) was 6.1, down from the previous two years (6.9 in 2023 and 7.1 in 2022),

	Rating Sat with Levy Investment 0-5 (n = 16)	Rating Sat with Levy Investment 6-10 (n = 10)
Satisfaction with R&D levy investment	3.0	7.3
Advocacy of the services, products and information SRA provide	4.9	7.4
% believe SRA staff are active or very active in engaging in industry matters and events in the district(s) where their mill(s) operate(s)	19%	90%
Average satisfaction across four aspects of the experience with local SRA staff	4.6	7.9
Satisfaction with SRA’s engagement with their company about sugarcane research priorities and opportunities	4.1	7.8
Satisfaction with SRA’s current investment in the Small Milling Research Projects providing value to their company	3.4	5.9
Average satisfaction across four aspects of SRA’s plant breeding program	5.5	7.5

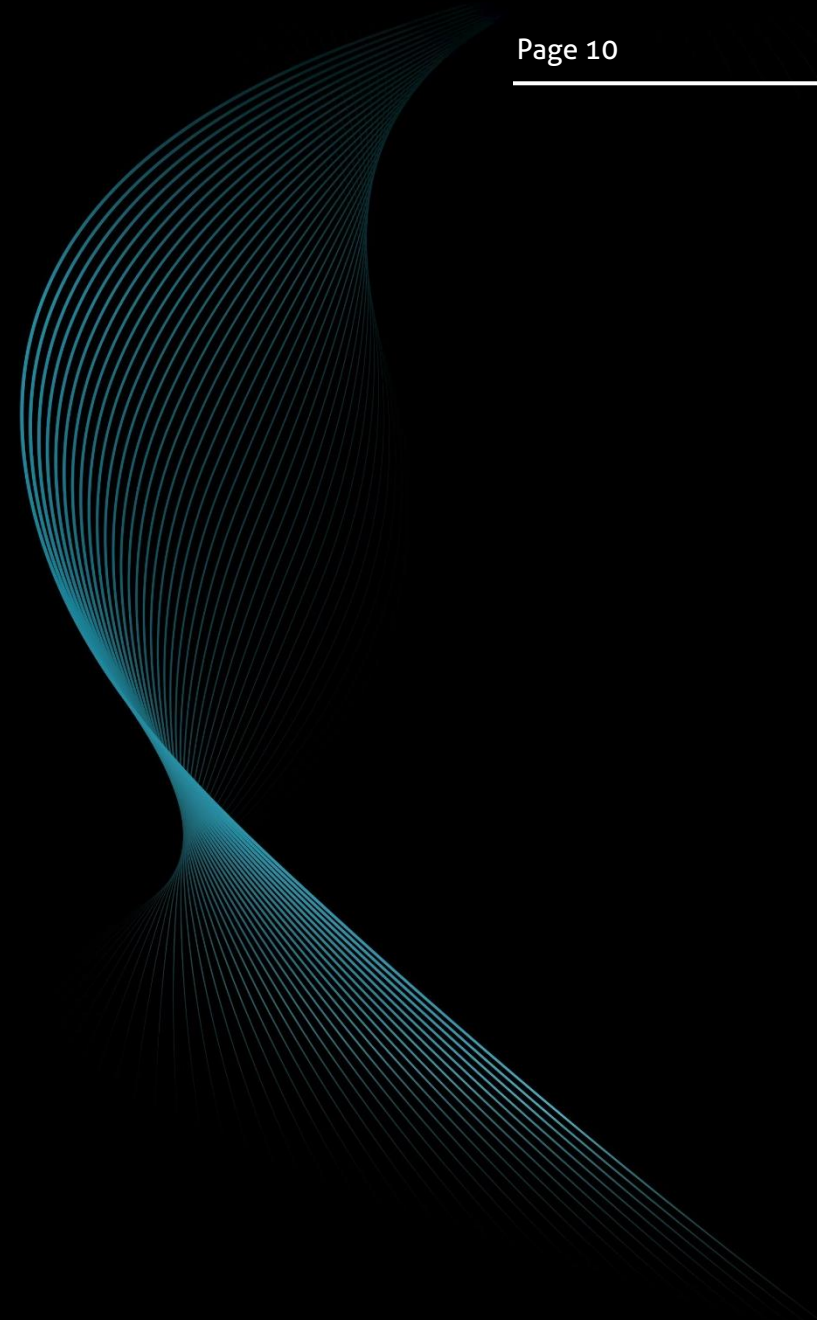
With this as context, a summary of the opportunities for improvement now follow.

# Observations and insights

Based on the feedback provided in the 2024 Miller Survey, we note:

- ✓ The survey process attracted good coverage of all 8 milling companies. This provides confidence about the representativeness of the results provided in the report.
- ✓ The results show again this year the variation in experience between and within millers. Closing the gap in ratings from across the different milling companies should be one of the focus responses from the feedback provided in the 2024 survey. There are likely to be a range of root causes behind some of the clear differences in ratings from the more critical cohort of representatives. This is likely to include their awareness and familiarity of SRA and its activities, a lack of strong engagement directly with SRA or other contributing factors. Efforts to ensure good consistent engagement across all milling companies will be important.
- ✓ The importance of local SRA staff in supporting the overall SRA-Miller engagement strategy is illustrated in the survey results. While there will be recurring capacity pressures, the local staff are the 'shop front' for SRA, developing good relationships across the milling companies will be important.
- ✓ Consistent with the grower feedback, concerns about the performance of the current varieties is one of the issues impacting millers' overall assessment of their SRA relationship. SRA could use the opportunity to describe the future plans for their breeding program and varieties. This may alleviate some of the concerns articulated across this research program.

The detailed results from the 2024 SRA Miller Survey now follows.



An aerial photograph of a construction site. In the foreground, there is a large, dense pile of green rebar. To the right of the rebar, a small excavator is visible. The background is a flat, light-colored area, possibly a road or a cleared field. The image is dark and grainy, with a dark orange horizontal band across the middle containing white text.

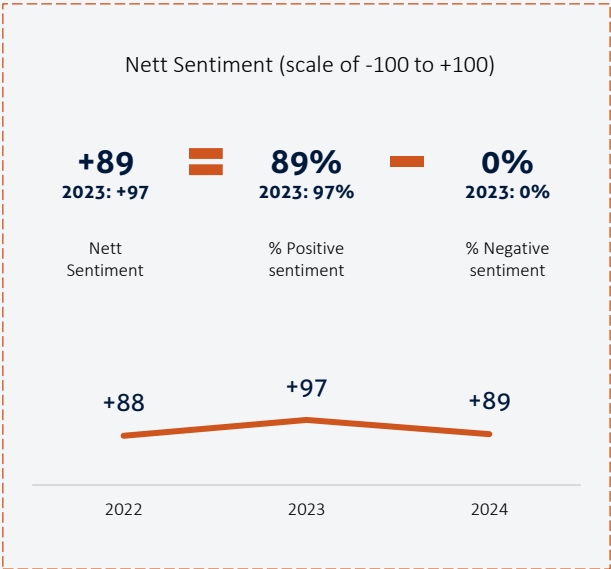
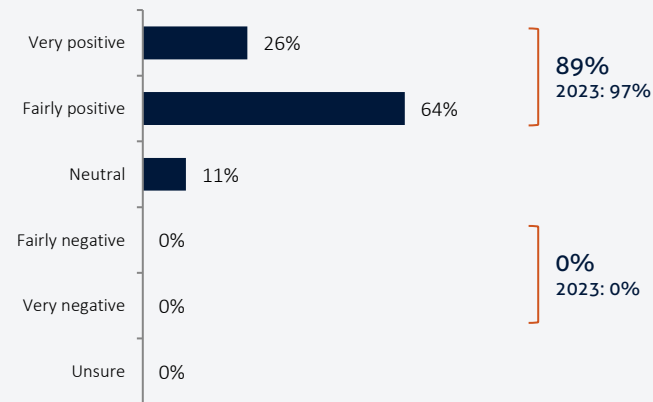
Detailed results

# Miller sentiment

Miller sentiment

# Future of the Australian sugarcane industry

Q1. How do you feel about the future of the Australian sugarcane industry over the next 12 months? Would you say you feel...?  
Base: All milling companies, n = 8 (n = 26 responses)



Milling companies continue to report a **positive outlook** for the sugarcane industry over the next 12 months.

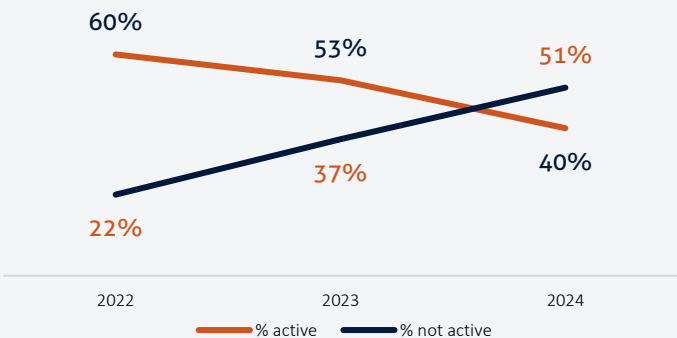
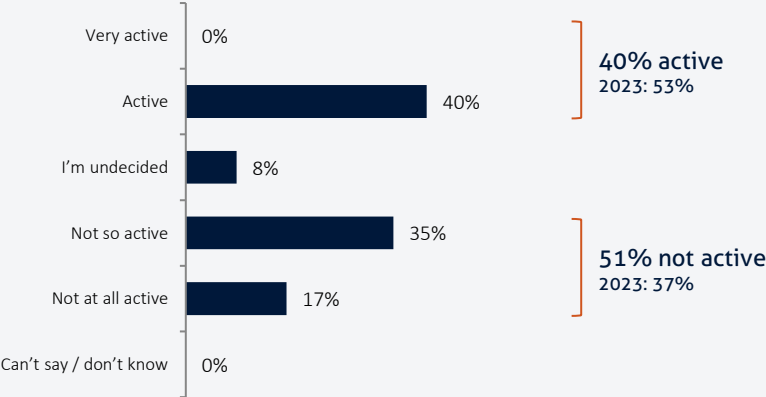
Almost all millers responding to the survey were positive about the future. None of the millers responding to the survey reported a negative outlook.

An aerial photograph of a construction site. A yellow excavator and a white truck are parked on a dirt road. To the left of the road is a field of green reeds. The background is a large, flat, brownish-grey area, possibly a dry lake bed or a large field of dry grass.

Detailed results

# Perceptions of local SRA engagement

Q2. How active do you think SRA staff are in engaging in industry matters and events in the district(s) where your mill(s) operate(s)?  
Base: All milling companies, n = 8 (n = 26 responses)



The proportion of milling company representatives completing the survey describing SRA staff as 'active' in engaging in industry matters has declined again this year.

There are now more describing SRA staff at not active than active in local industry matters.

It is unclear whether this is a capacity issue in some regions or a different strategy being adopted by local SRA staff. The analysis later shows this perception of local SRA involvement is correlated with millers' overall satisfaction with SRA.

Perceptions of local SRA engagement

# Experience with local SRA staff

Q3. The following question is about your company’s experience with local SRA staff who engage with growers and milling company representatives. Overall, how satisfied are you...

Base: All milling companies (excluding “Can’t say” answers), n varies



5.3

Average of the four satisfaction ratings

	Activity of SRA staff in engaging in industry matters and events in your district	
	Active	Not active
Minimum base (milling companies):	3	4
That SRA staff are a trusted information source?	7.7	5.8
That there are adequate opportunities to engage with SRA staff about issues and opportunities in your district?	7.5	3.1
With the quality of support provided to growers by SRA staff?	7.2	3.1
With the responsiveness of SRA staff in addressing the issues and opportunities raised in your district?	7.1	2.7

# What can local SRA staff do to improve their service

Q4. What do the local SRA staff need to do that they aren't doing now to improve the service they provide?

Base: All milling companies who provided a valid response, n = 8 (n = 26 responses)

1. Increase the number of staff available to provide support to millers.

2. Provide more training and support to millers on how to use the SRA system.

3. Improve the communication between SRA staff and millers.

4. Provide more information on the SRA system and its benefits.

5. Increase the frequency of SRA staff visits to mills.

6. Provide more support to millers with their SRA system.

7. Improve the SRA system to make it easier to use.

8. Provide more support to millers with their SRA system.

9. Increase the frequency of SRA staff visits to mills.

10. Provide more support to millers with their SRA system.

11. Improve the communication between SRA staff and millers.

12. Provide more training and support to millers on how to use the SRA system.

13. Increase the number of staff available to provide support to millers.

14. Provide more information on the SRA system and its benefits.

15. Improve the SRA system to make it easier to use.

16. Provide more support to millers with their SRA system.

17. Increase the frequency of SRA staff visits to mills.

18. Provide more support to millers with their SRA system.

19. Improve the communication between SRA staff and millers.

20. Provide more training and support to millers on how to use the SRA system.

21. Increase the number of staff available to provide support to millers.

22. Provide more information on the SRA system and its benefits.

23. Improve the SRA system to make it easier to use.

24. Provide more support to millers with their SRA system.

25. Increase the frequency of SRA staff visits to mills.

26. Provide more support to millers with their SRA system.

27. Improve the communication between SRA staff and millers.

28. Provide more training and support to millers on how to use the SRA system.

29. Increase the number of staff available to provide support to millers.

30. Provide more information on the SRA system and its benefits.

31. Improve the SRA system to make it easier to use.

32. Provide more support to millers with their SRA system.

33. Increase the frequency of SRA staff visits to mills.

34. Provide more support to millers with their SRA system.

35. Improve the communication between SRA staff and millers.

36. Provide more training and support to millers on how to use the SRA system.

37. Increase the number of staff available to provide support to millers.

38. Provide more information on the SRA system and its benefits.

39. Improve the SRA system to make it easier to use.

40. Provide more support to millers with their SRA system.

An aerial photograph of a field. In the lower right, a small white vehicle with a yellow arm is parked on a dirt path. A person is standing next to it. The field is mostly green with some brown patches. The top half of the image is dark and blurry.

Detailed results

# Perceptions of SRA partnership

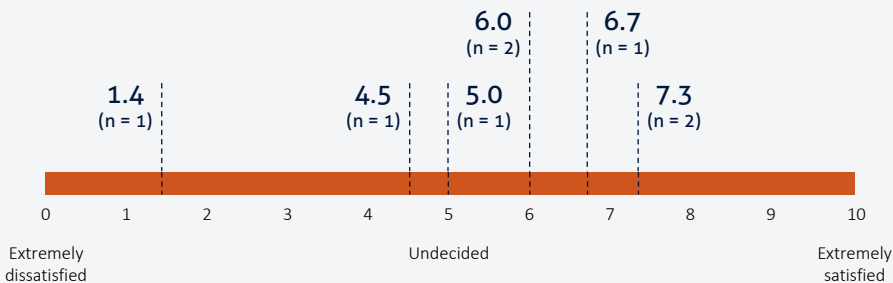
Perceptions of SRA partnership

# Satisfaction with SRA's engagement

Q5. Overall, how satisfied are you with SRA's engagement with your company about sugarcane research priorities and opportunities?  
Base: All milling companies (excluding "Can't say" answers), n = 8 (n = 26 responses)



Range of mean results across milling companies (n = 8)



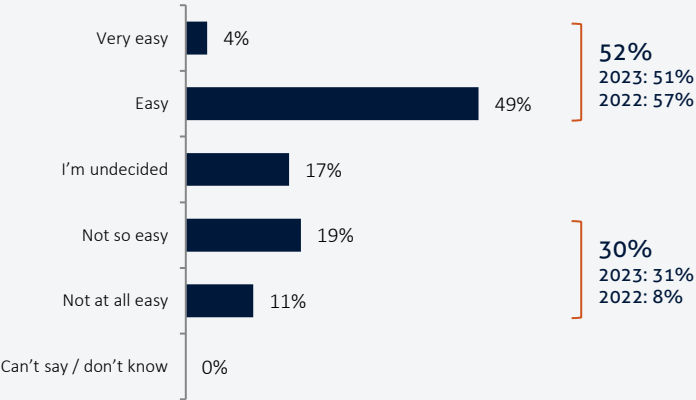
Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 0 through to a rating of 10.

Perceptions of SRA partnership

# Ease of working with SRA and collaboration with others

Q6. How easy do you find SRA to work with?

Base: All milling companies, n = 8 (n = 26 responses)

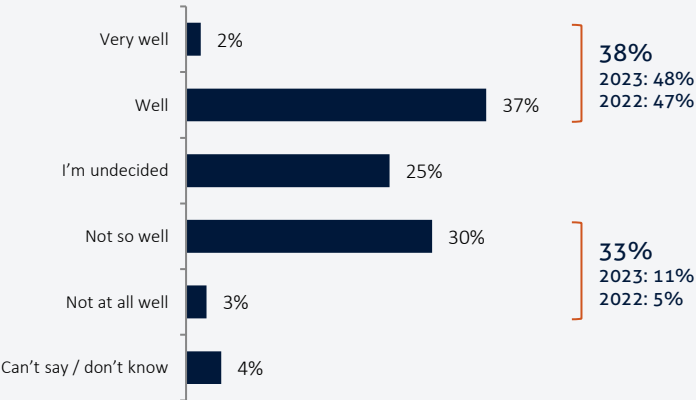


Consistent with previous years results, milling companies indicated that SRA was easy to work with. However, there continues to be a smaller cohort who hold an opposing view.

This is an important foundational characteristic of the SRA-Miller (and any) business to business relationship. Uncovering and resolving any relationship roadblocks should translate to improvements across several measures.

Q8. And in your view, how well do you think SRA collaborates with other organisations and industry stakeholders?

Base: All milling companies, n = 8 (n = 26 responses)



While most responded positively to how SRA collaborates across the industry, there is a sizeable cohort holding a different perspective on this measure.

Perceptions of SRA partnership

# Ease of working with SRA

Q7. Why do you say that?  
Base: All milling companies with a response of “Not so easy” or “Not at all easy” AND who provided a valid response, n = 4 (n = 6 responses)

30% (n = 6 responses) reported it was “not so easy” or “not at all easy” to work with SRA.

When asked why they said this, this is their response...

[Redacted text block containing 10 lines of blurred content]

An aerial photograph of a field. The top half of the image is a dark, textured surface, possibly a road or a different type of ground cover. The bottom half shows a field of green, grass-like vegetation. In the center-right of the field, there is a small, white, rectangular vehicle or sensor unit. To its left, there is a small, white, vertical pole or marker. The overall image has a dark, muted color palette.

Detailed results

# Perception about research portfolio

# Level of urgency for SRA to fund research addressing priorities

Millers were presented with the following context before answering this section:

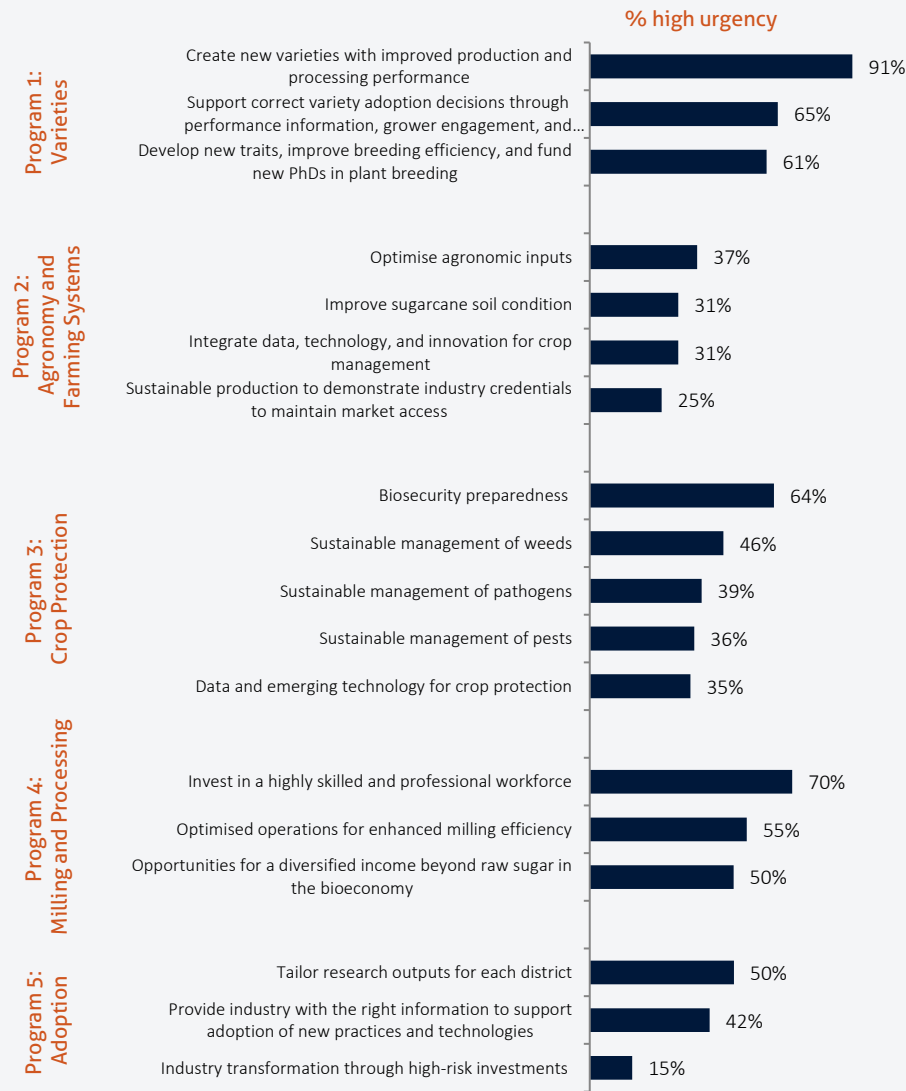
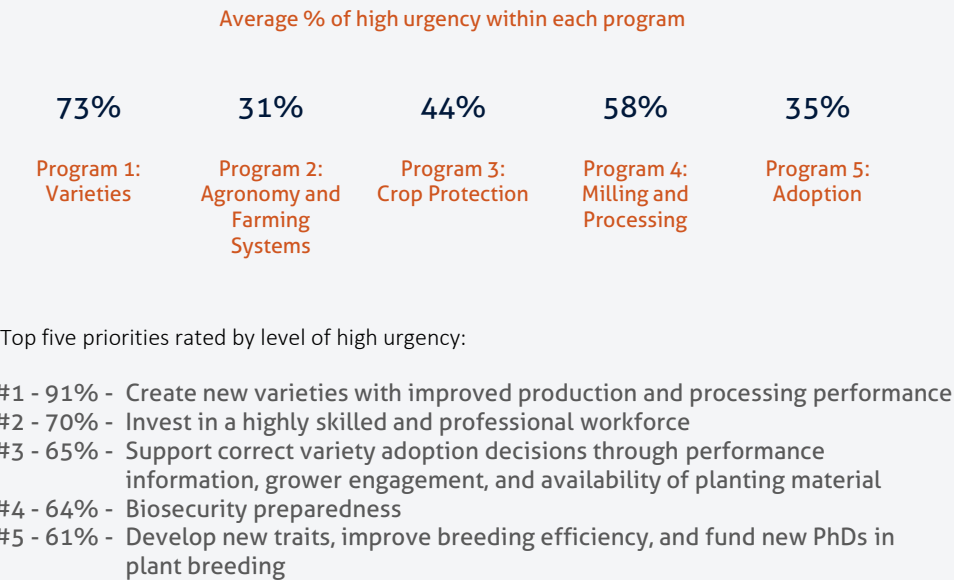
*SRA has designed a balanced portfolio that includes an appropriate mix of RD&E activities.*

*In 2024, SRA released its Ten-Year R&D Plan that integrates their investment in research across five programs including: varieties, agronomy and farming systems, crop protection, milling and processing, and adoption.*

*Each program includes research priorities for funding through SRA projects and core programs such as plant breeding and biosecurity.*

*Please rate the level of urgency with which SRA should fund research to address these priorities considering the value to your farm business and the broader industry.*

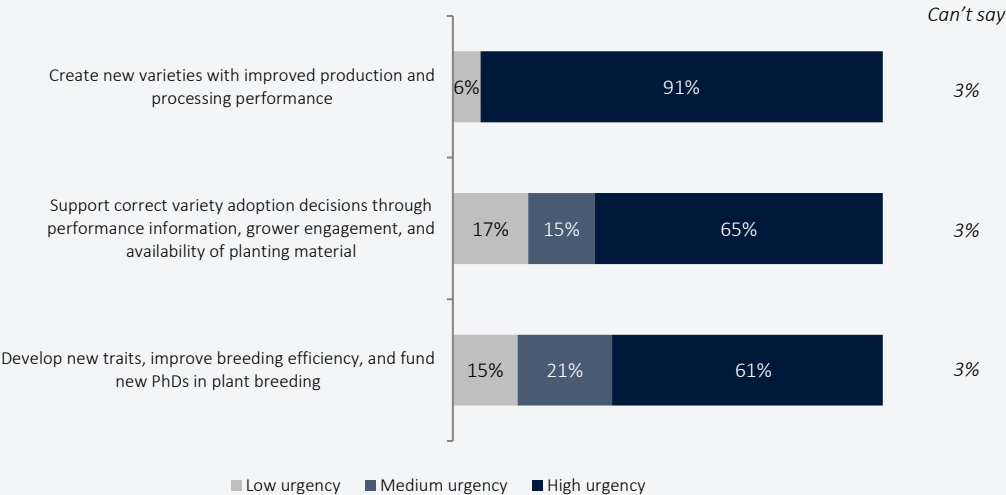
Millers were then asked to rate the level of urgency with which SRA should fund research to address 18 priorities across the five programs – a summary of the high urgency results is provided here, with detailed results for each priority and program on the following pages.



Perceptions about research portfolio

# Level of urgency – Program 1: Varieties

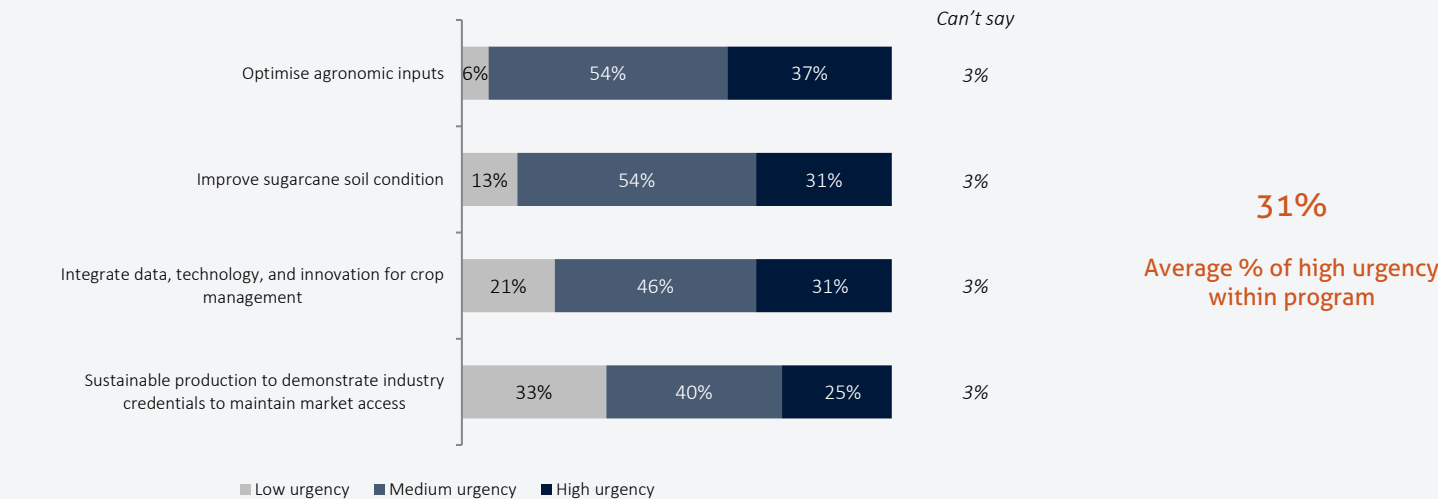
Q9. Thinking about the value to your company and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.  
Base: All milling companies, n = 8 (n = 26 responses)



73%  
Average % of high urgency  
within program

# Level of urgency – Program 2: Agronomy and Farming Systems

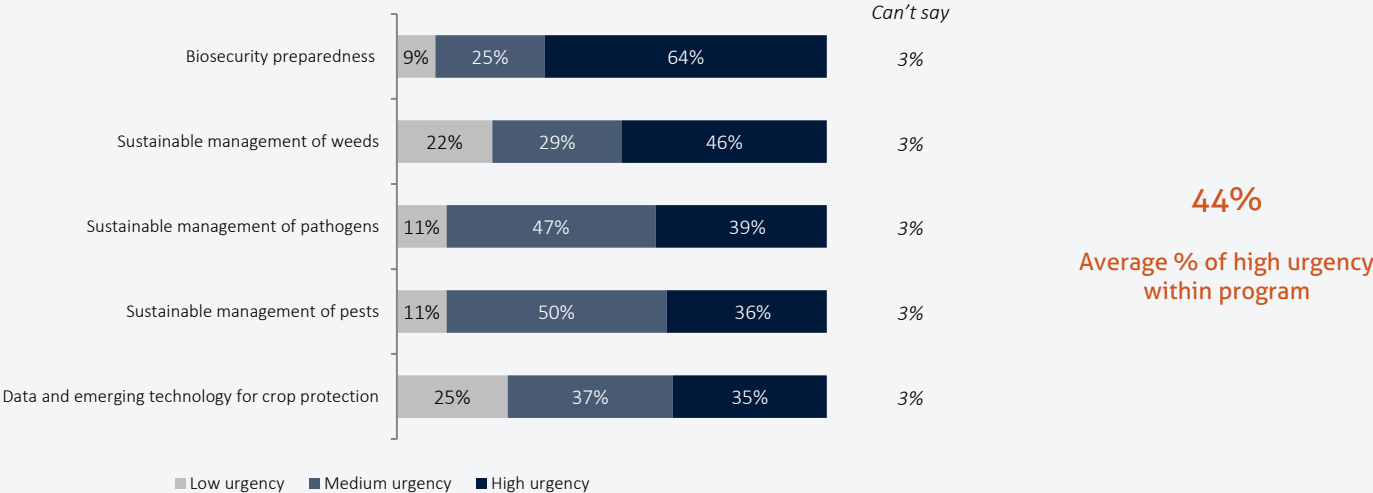
Q10. Thinking about the value to your company and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.  
Base: All milling companies, n = 8 (n = 26 responses)



Perceptions about research portfolio

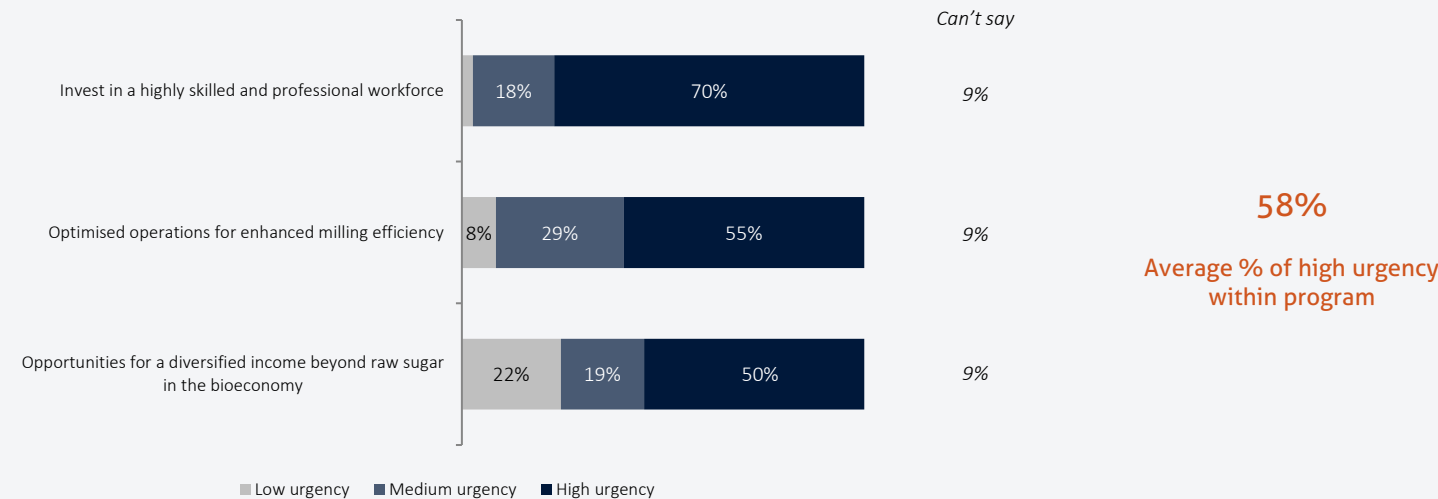
# Level of urgency – Program 3: Crop Protection

Q11. Thinking about the value to your company and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.  
Base: All milling companies, n = 8 (n = 26 responses)



# Level of urgency – Program 4: Milling and Processing

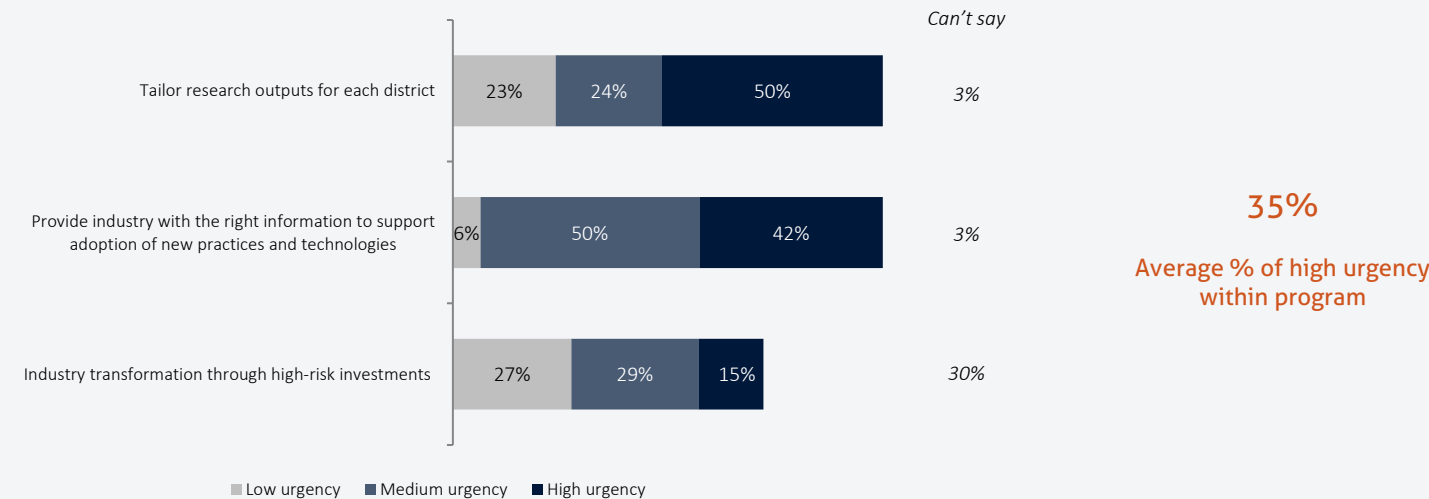
Q12. Thinking about the value to your company and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.  
Base: All milling companies, n = 8 (n = 26 responses)



Perceptions about research portfolio

# Level of urgency – Program 5: Adoption

Q13. Thinking about the value to your company and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.  
Base: All milling companies, n = 8 (n = 26 responses)



Base: All milling companies who provided a valid response, n = 8 (n = 26 responses)

1. The first step in the process is to identify the problem or goal. This involves understanding the current situation and what needs to be achieved.

2. Next, it is important to gather relevant information and data. This can be done through research, interviews, or observation.

3. Once the information is gathered, the next step is to analyze it. This involves identifying patterns, trends, and potential causes.

4. After analysis, the next step is to develop a plan or strategy. This involves determining the steps that need to be taken to achieve the goal.

5. The final step is to implement the plan. This involves putting the strategy into action and monitoring progress.

6. Throughout the process, it is important to communicate and collaborate with others. This can help to ensure that everyone is on the same page and working towards the same goal.

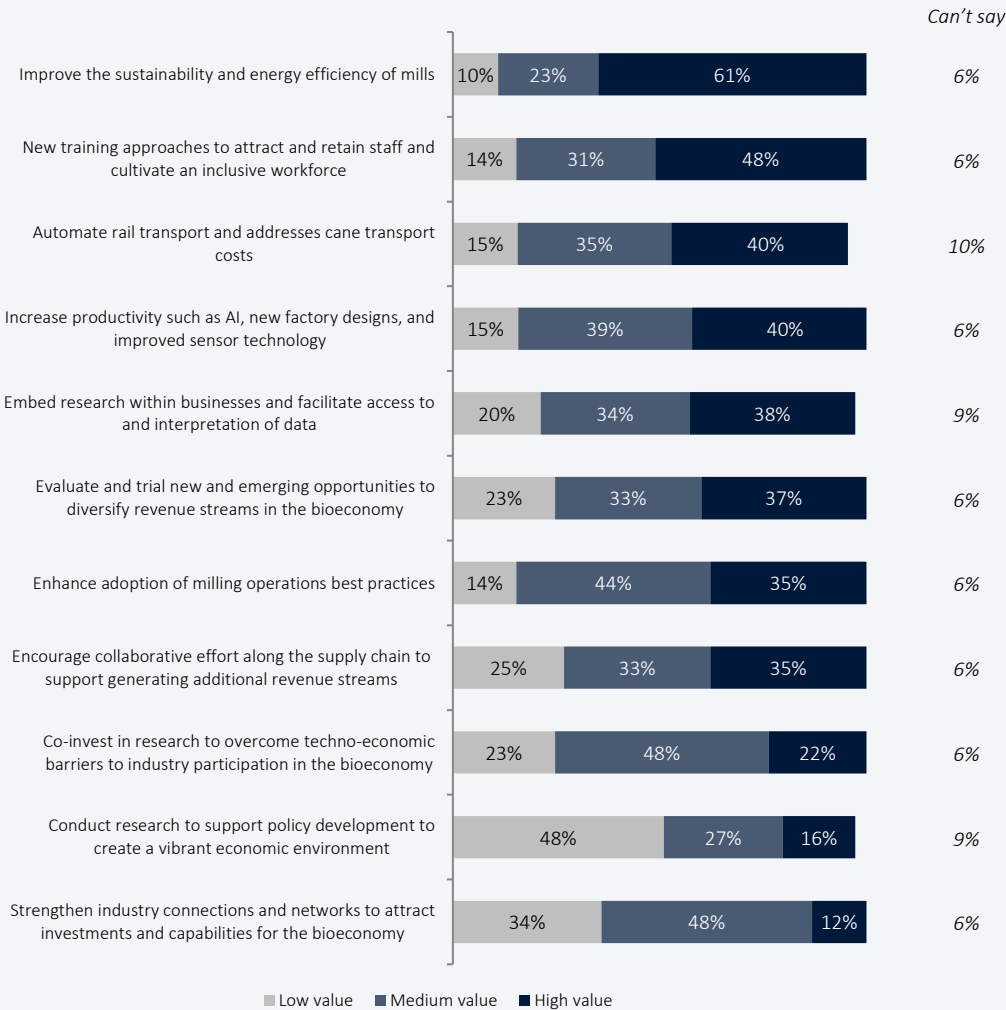
7. Finally, it is important to evaluate the results of the process. This involves assessing whether the goal was achieved and what lessons were learned.

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# Perceptions about research portfolio

## Value in current milling R&D investment

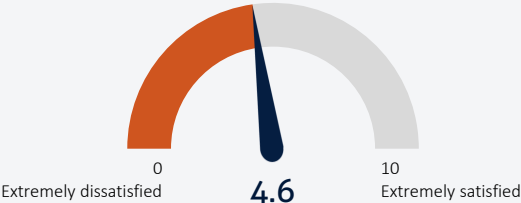
Q15. Please indicate the level of value to your company in the next five years with SRA investing in R&D that addresses the following strategies to advance the milling sector.  
 Base: All milling companies, n = 8 (n = 26 responses)



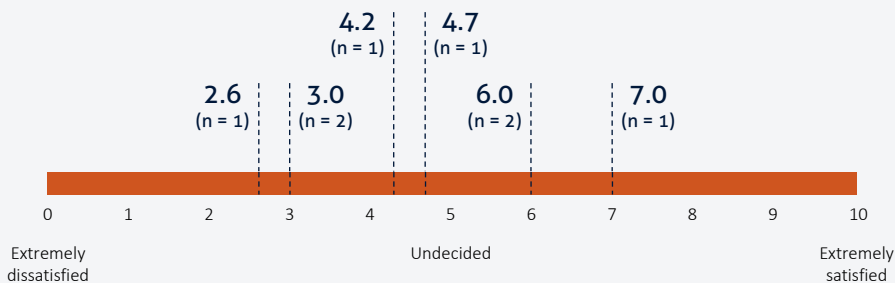
Perceptions about research portfolio

# SRA's investment in Small Milling Research Projects

Q16. Overall, how satisfied are you that SRA's current investment in the Small Milling Research Projects provide value to your company?  
Base: All milling companies (excluding "Can't say" answers), n = 8 (n = 23 responses)



Range of mean results across milling companies (n = 8)



Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 0 through to a rating of 9.

Q17. What would you like to see from research partners (such as QUT) who deliver research funded by SRA for milling companies to provide greater benefit and value for your operations?

Base: All milling companies who provided a valid response, n = 8 (n = 26 responses)

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The following information is provided for the purpose of providing a general overview of the information contained in the document. It is not intended to be a substitute for the full text of the document.

The document is organized into several sections, each of which is described below.

The first section, titled "Introduction", provides a general overview of the document and its purpose.

The second section, titled "Background", provides a detailed description of the background information related to the document.

The third section, titled "Methodology", describes the methods used to collect and analyze the data.

The fourth section, titled "Results", presents the findings of the study.

The fifth section, titled "Discussion", discusses the implications of the findings and provides conclusions.

The sixth section, titled "References", lists the sources used in the study.

The seventh section, titled "Appendix", contains additional information related to the study.

The eighth section, titled "Index", provides a list of the topics covered in the document.

The ninth section, titled "Glossary", defines the terms used in the document.

The tenth section, titled "Bibliography", lists the sources used in the study.

The eleventh section, titled "Index", provides a list of the topics covered in the document.

The twelfth section, titled "Glossary", defines the terms used in the document.

The thirteenth section, titled "Bibliography", lists the sources used in the study.

The fourteenth section, titled "Index", provides a list of the topics covered in the document.

The fifteenth section, titled "Glossary", defines the terms used in the document.

The sixteenth section, titled "Bibliography", lists the sources used in the study.

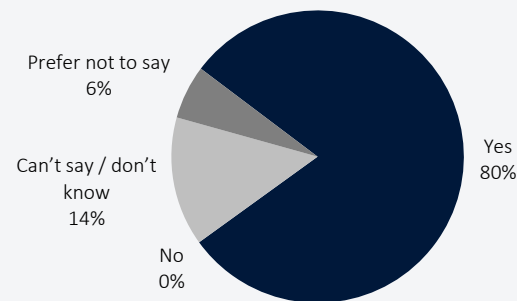
The seventeenth section, titled "Index", provides a list of the topics covered in the document.

The eighteenth section, titled "Glossary", defines the terms used in the document.

The nineteenth section, titled "Bibliography", lists the sources used in the study.

The twentieth section, titled "Index", provides a list of the topics covered in the document.

Q18. Is your company currently exploring alternative revenue opportunities beyond crystal sugar?  
Base: All milling companies, n = 8 (n = 26 responses)



Q19. Can you tell us briefly about the kind of opportunities your company is exploring?  
Base: All milling companies with a response of "Yes" AND who provided a valid response, n = 7 (n = 14 responses)



An aerial photograph of a field. The top half of the image is a dark, textured area, possibly a road or a different type of vegetation. The bottom half shows a field of green, leafy plants. A small, light-colored vehicle, possibly a tractor or a small truck, is parked on a path that runs horizontally across the middle of the field. A person is standing near the vehicle. The overall lighting is dim, suggesting it might be early morning or late afternoon.

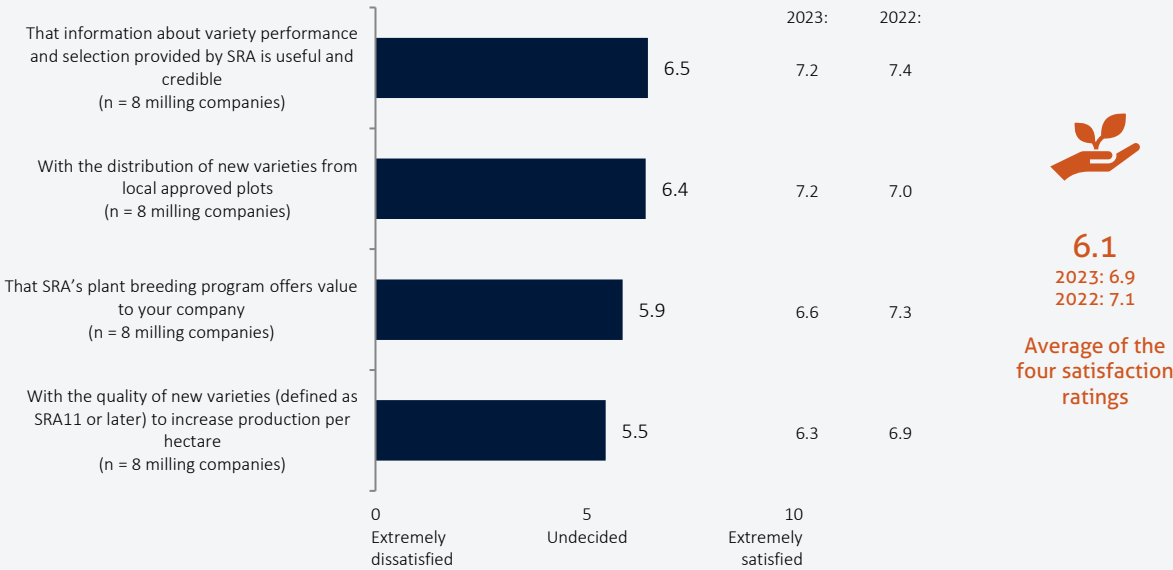
Detailed results

# Perceptions about plant breeding program and varieties

Perceptions about plant breeding program and varieties

# Satisfaction with SRA’s plant breeding program

Q20. Regarding SRA’s plant breeding program, overall, how satisfied are you...  
Base: All milling companies (excluding “Can’t say” answers), n varies



# Helping growers select varieties for their farm

Q21. What should SRA be doing to help growers make better decisions about selecting varieties for their farm?

Base: All milling companies who provided a valid response, n = 8 (n = 26 responses)

1. Provide more information on the different varieties available and their characteristics.

2. Offer advice on the best varieties for different farm types and soil conditions.

3. Provide more information on the different varieties available and their characteristics.

4. Offer advice on the best varieties for different farm types and soil conditions.

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16. Offer advice on the best varieties for different farm types and soil conditions.

An aerial photograph of a construction site. A yellow excavator and a white truck are parked on a dirt road. To the left of the road is a field of green reeds. The background is a dark, textured area, possibly a body of water or a forest.

Detailed results

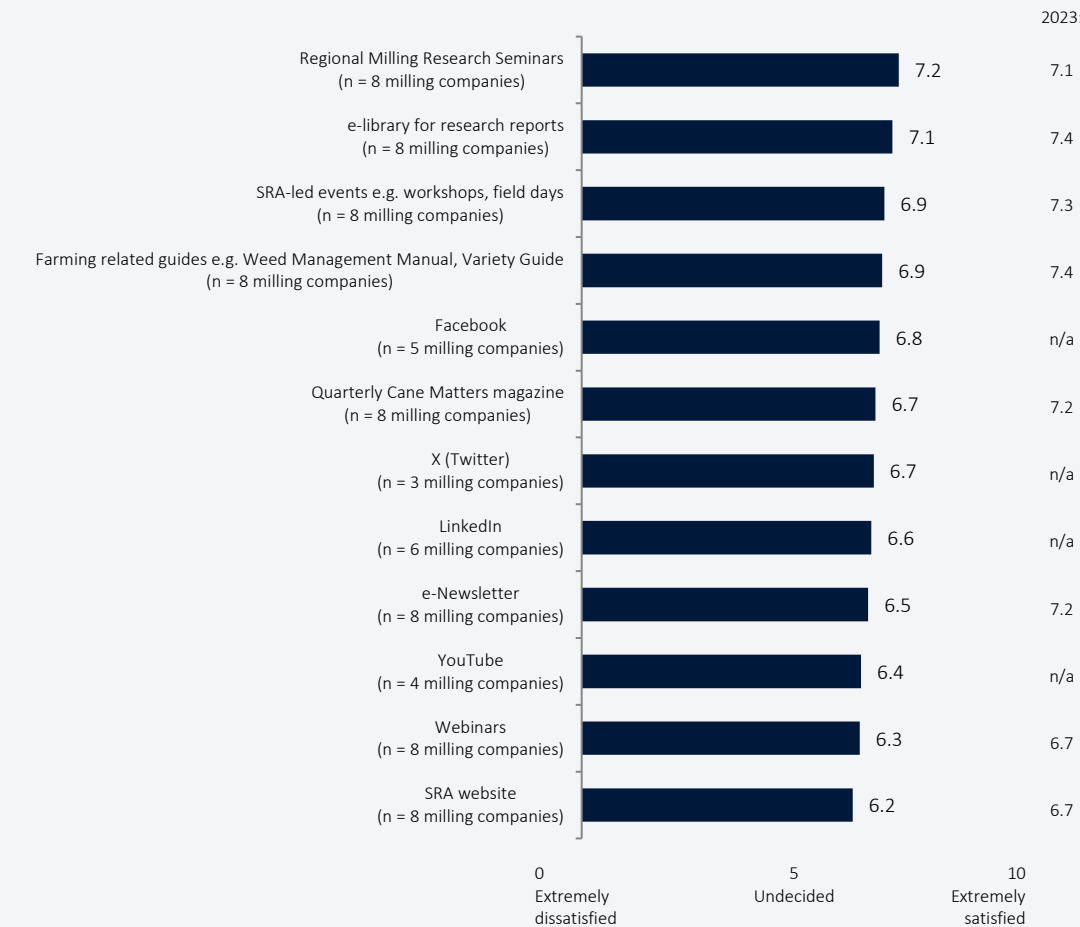
# Communication needs and experiences

# 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 milling companies in the future.

Q22. How satisfied are you with the following communication channels to access information about sugarcane farming and milling research?

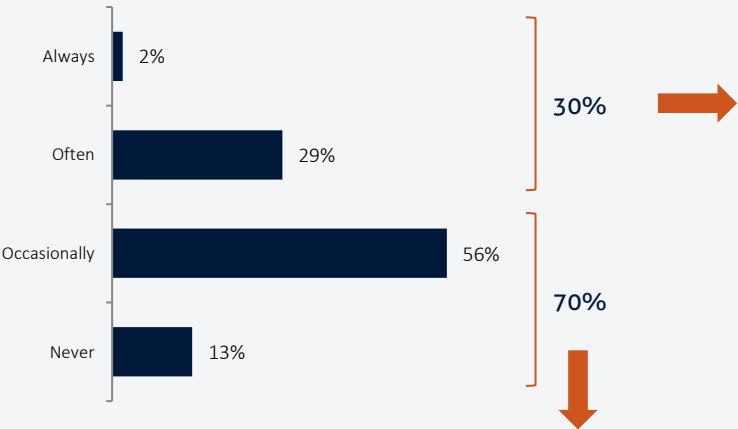
Base: All milling companies (excluding “Can’t say” answers), n varies



\* Measure in 2023 was “Publications such as CaneMatters”.

# Frequency of use of info from SRA communications

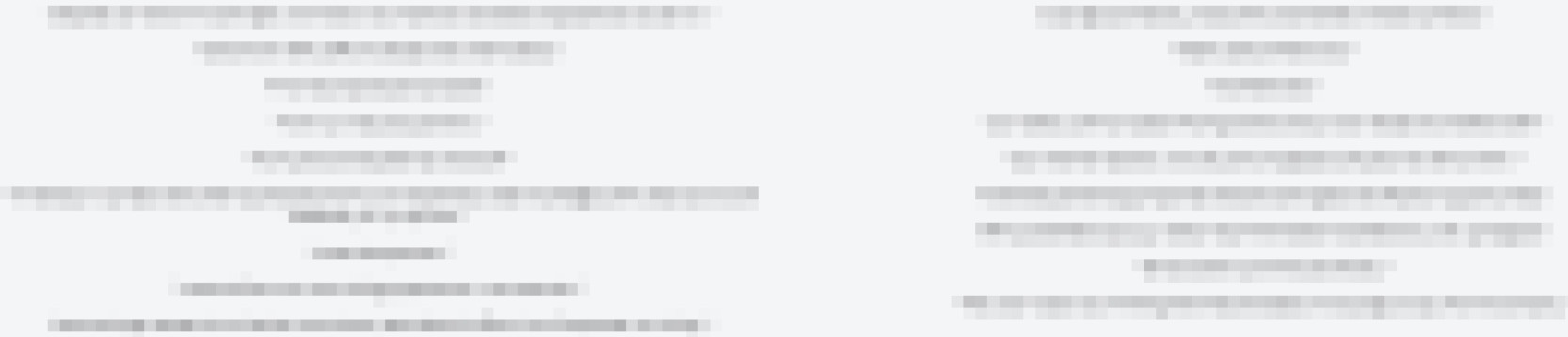
Q23. How often do you use information from SRA communications to make decisions related to your company?  
Base: All milling companies, n = 8 (n = 26 responses)



Q25. Why do you prefer information from SRA communications over other sources?  
Base: All milling companies who reported "Often" or "Always" AND provided a valid response, n = 5 (n = 8 responses)

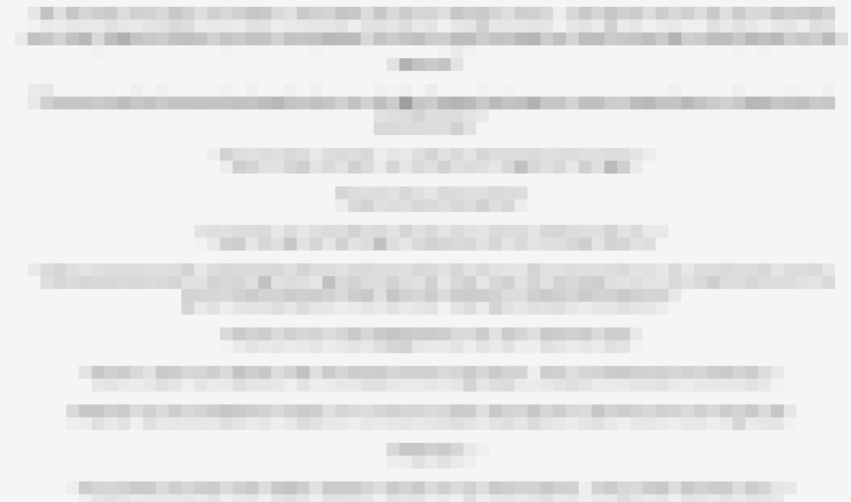


Q24. Where do you get your information from to make decisions related to your company?  
Base: All milling companies who reported "Never" or "Occasionally" AND provided a valid response, n = 8 (n = 18 responses)



Please select all that apply.

Base: All milling companies, n = 8 (n = 26 responses)



An aerial photograph of a construction site. A yellow excavator and a white truck are parked on a dirt road. To the left of the road is a field of green reeds. The background is a dark, textured area, possibly a body of water or a forest.

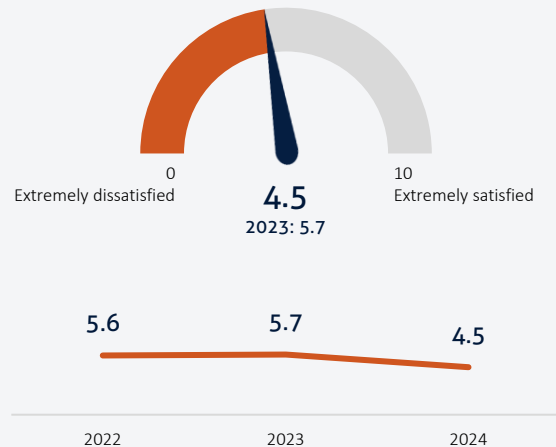
Detailed results

# Performance indicators

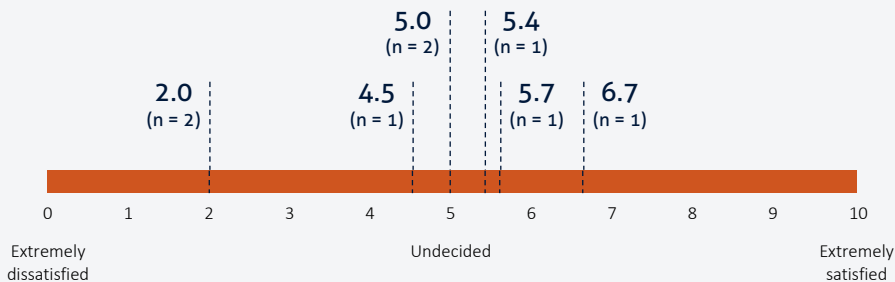
Performance indicators

# Satisfaction with R&D levy investment

Q27. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?  
Base: All milling companies (excluding "Can't say" answers), n = 8 (n = 26 responses)



Range of mean results across milling companies (n = 8)



Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 0 through to a rating of 8.

Millers' overall satisfaction rating was at 4.5, a decline on the 2022 and 2023 results.

The rating provided across the eight companies ranged from 2.0 through to 6.7, reflecting a clearly varied experience and satisfaction across companies.

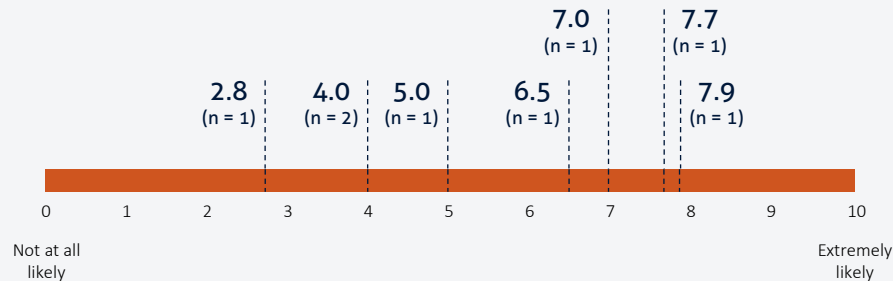
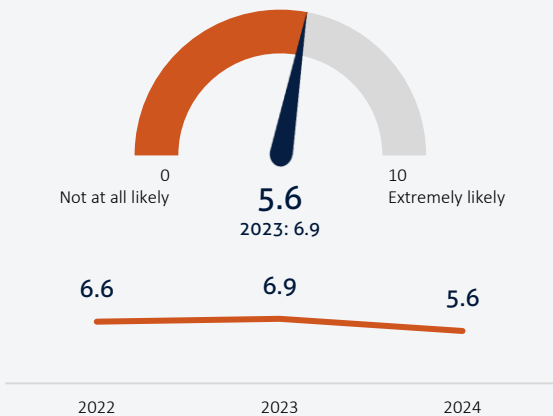
It will be important, over the next 12 months, to identify mechanisms and initiatives that will help close the gap on the millers' experiences.

Performance indicators

# Advocacy of SRA and Net Promoter Score

Q29. How likely is that you would recommend the services, products and information SRA provides to other millers or industry associates?  
Base: All milling companies (excluding "Can't say" answers), n = 8 (n = 26 responses)

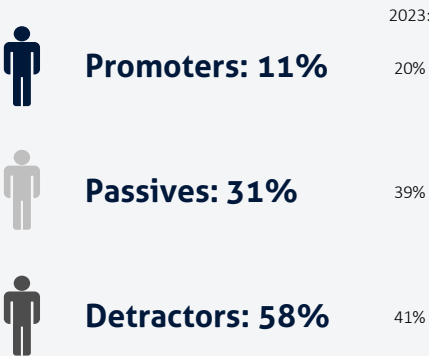
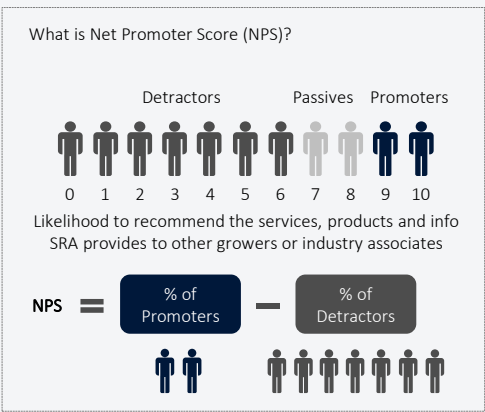
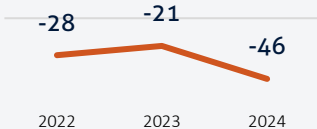
Range of mean results across milling companies (n = 8)



Analysis of the individual responses provided by milling company representatives shows likelihood ratings on this measure ranged from a rating of 0 through to a rating of 10.

Net Promoter Score  
Base: All milling companies, n = 8 (n = 26 responses)

## Net Promoter Score



# Recommendations for SRA to improve their outcomes

Q28. What is your strongest recommendation you would have to SRA to improve the outcomes it achieves through its investment and management of R&D?

Base: All milling companies who provided a valid response, n = 8 (n = 26 responses)

1. Increase the number of R&D projects funded by SRA to ensure a diverse range of research areas are covered.

2. Provide more direct funding to R&D projects, rather than through intermediaries, to reduce costs and increase efficiency.

3. Establish a dedicated R&D fund to support long-term research and development in the sugar industry.

4. Encourage collaboration between R&D teams from different milling companies to foster innovation and knowledge sharing.

5. Increase the transparency of SRA's funding decisions and the outcomes of funded projects.

6. Provide more support for R&D projects in the early stages, such as through pilot programs or grants.

7. Establish a R&D advisory board to provide input and guidance on funding decisions.

8. Increase the number of R&D projects funded by SRA to ensure a diverse range of research areas are covered.

9. Provide more direct funding to R&D projects, rather than through intermediaries, to reduce costs and increase efficiency.

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13. Provide more support for R&D projects in the early stages, such as through pilot programs or grants.

14. Establish a R&D advisory board to provide input and guidance on funding decisions.

15. Increase the number of R&D projects funded by SRA to ensure a diverse range of research areas are covered.

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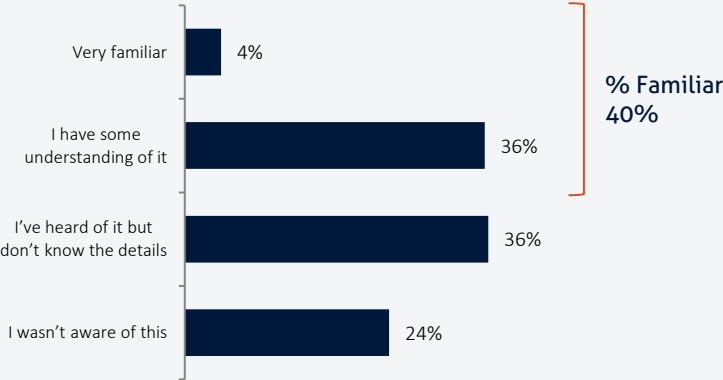
14. Establish a R&D advisory board to provide input and guidance on funding decisions.

15. Increase the number of R&D projects funded by SRA to ensure a diverse range of research areas are covered.

# SRA’s response to the Independent Performance Review

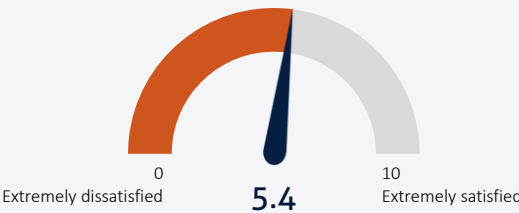
Q30. How familiar would you say you are of SRA’s response to the Independent Performance Review released in October?

Base: All milling companies, n = 8 (n = 26 responses)

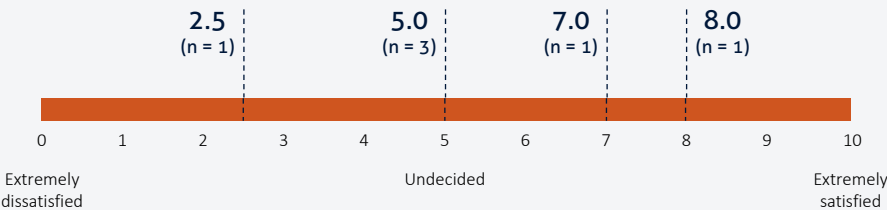


Q31. How satisfied are you that SRA has responded adequately to the recommendations in the Independent Performance Review in its Response Plan released in October?

Base: All milling companies who have at least some understanding of the SRA response (excluding “Can’t say” answers), n = 6 (n = 8 responses)



Range of mean results across milling companies (n = 6)

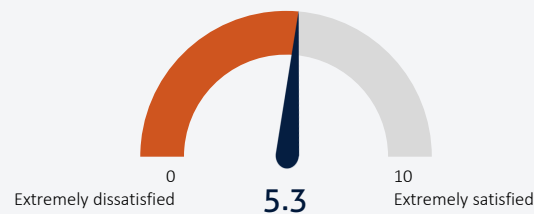


Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 1 through to a rating of 8.

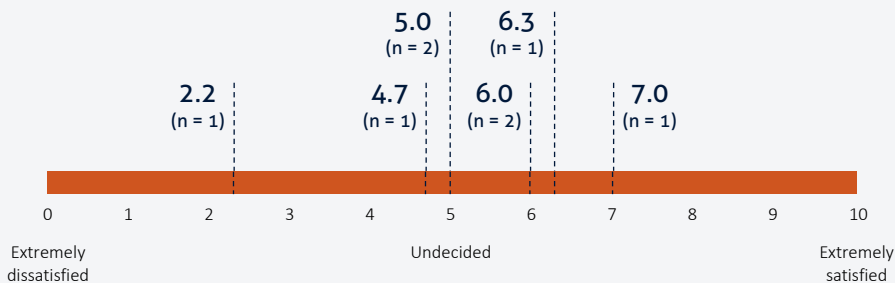
# Satisfaction with SRA’s changes to increase transparency

Q32. How satisfied are you with changes made by SRA to increase transparency about research investment allocation and its research portfolio balance as reported in its Annual Operating Plan and Annual Report?

Base: All milling companies (excluding “Can’t say” answers), n = 8 (n = 22 responses)



Range of mean results across milling companies (n = 8)



Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 1 through to a rating of 9.

Base: All milling companies who provided a valid response, n = 8 (n = 26 responses)

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1. The first step is to identify the problem or question that needs to be answered.  
 2. Next, gather relevant information and data to address the problem.  
 3. Then, analyze the information and data to identify patterns and trends.  
 4. After that, develop a hypothesis or a proposed solution based on the analysis.  
 5. Finally, test the hypothesis or solution through experiments or further analysis.

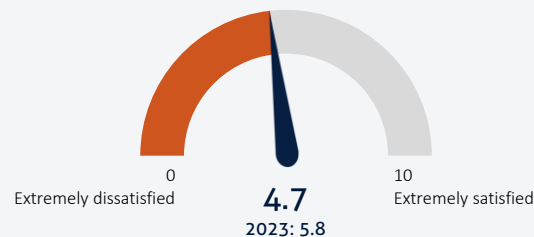
# Appendices



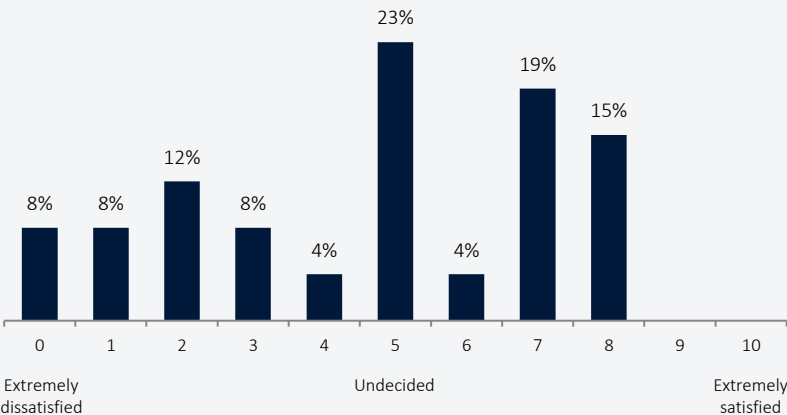
Q27. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?

(average results of all respondents regardless of milling company)

Base: All milling company respondents (excluding “Can’t say” answers), n = 26



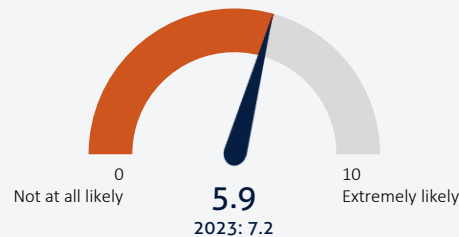
Distribution of ratings



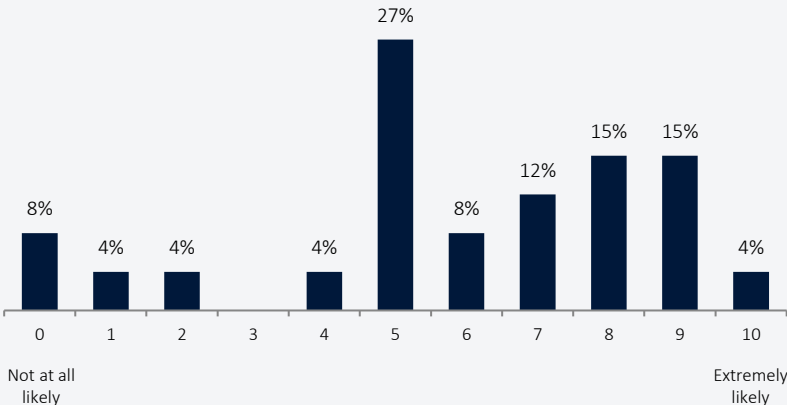
Q29. How likely is that you would recommend the services, products and information SRA provides to other millers or industry associates?

(average results of all respondents regardless of milling company)

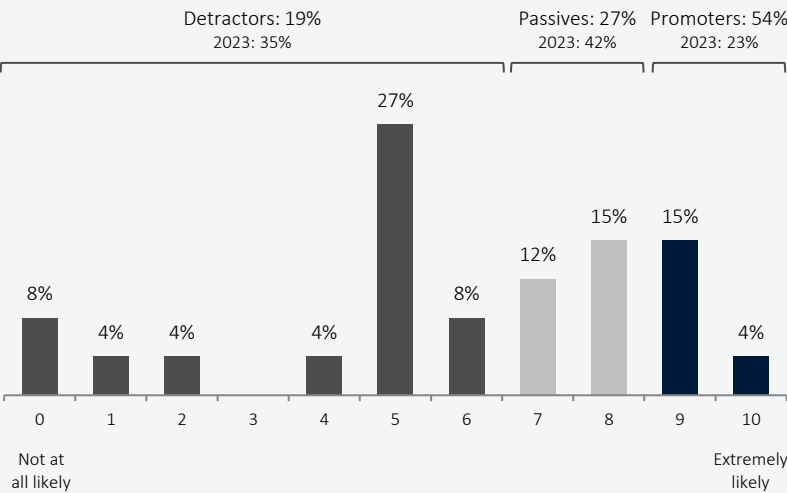
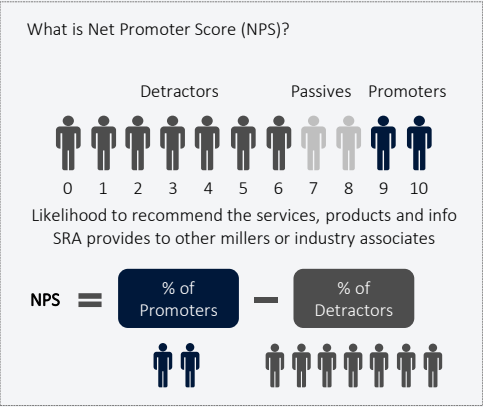
Base: All milling company respondents, n = 26



Distribution of ratings



Net Promoter Score  
(average results of all respondents regardless of milling company)  
Base: All milling company respondents, n = 26



**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 2024 SRA Miller Survey provides another opportunity to stop, listen and reflect on the level of miller 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 representatives of the eight active milling companies across Australia. This included a range of different roles in many of the milling companies, from CEO through to other senior executive and operational management positions. There was then the opportunity for more than one representative from each milling company to complete the survey.

A 20-minute phone survey was conducted with respondents. This survey measured, amongst other things:

- Miller sentiment
- Perceptions of district engagement
- Perception of SRA partnership
- Perceptions about research portfolio
- Perceptions around plant breeding programs and new varieties
- Communication needs and experiences
- Performance indicators
- Voice of the miller

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 millers via computer-assisted telephone interviewing (CATI). The survey method utilised SRA’s internal list with contact details.

**Response** Throughout the survey period, n = 26 representatives across the eight active milling companies responded and completed the survey. A breakdown of the total number of completes by milling company is provided below. Please note that Wilmar provided a single survey response that collated feedback across key stakeholders in their company.

Overall	By Milling Company							
Total completes	Bundaberg Sugar	Isis	Mackay Sugar	MSF Sugar	Rocky Point (Heck Group)	Sunshine Sugar	Tully Sugar	Wilmar Sugar
26	2	3	5	7	2	3	3	1

**Weighting** As noted above, more than one representative from each of the eight milling companies were invited to provide feedback through the Miller survey. To ensure the results were balanced and not overweighted to those companies where there was more than one respondent, it was agreed with SRA that an ‘company’ average would be estimated for those milling companies where more than one respondent provided feedback. So while there were some n = 26 people who responded to the survey, the report will indicate a sample size of 8 milling companies.

**Timing** The survey was open for response on 23<sup>rd</sup> October 2024 and remained open until 18<sup>th</sup> November 2024.

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