



2023 Miller Survey

A survey of milling companies

June 2023



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 nine 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 = 31 representatives from the nine milling companies responded and completed the survey between 9th May 2023 and 26th May 2023.

The report provides company-level results

Estimates provided in this report

As noted above, more than one representative from each of the nine 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 $n = 31$ responses from the 41 people invited to provide feedback.
- Of the 9 milling companies:
 - 3 milling companies had five respondents to the survey;
 - 2 milling companies had four respondents; and
 - 4 milling companies had two respondents.

The report then provides coverage of feedback from all nine of the 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 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 $n = 31$ people who responded to the survey, the report will indicate a sample size of 9 milling companies.

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





Management summary

We spoke to 31 representatives across 9 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



SRA's organisational planning

SRA's Strategic Plan
2021-2026

% Familiar: 60%

5.8

Satisfaction
out of 10

SRA's research
investment planning

% Familiar: 63%

5.5

Satisfaction
out of 10

SRA's district
plans

% Familiar: 71%

6.2

Satisfaction
out of 10

Satisfaction with key miller touchpoints



District
Managers*

5.4



Researchers*

6.0



Products &
Services*

6.9



Plant
Breeding
Program*

6.9



Quality of
Comms

6.7

Other notable measures



53%

% rating very active or active in their perception of SRA staff engaging in industry matters and events in the district(s) where their mill(s) operate



5.4
out of 10

Satisfaction with SRA's engagement with their company about new sugarcane research and district issues and opportunities
(scale of 0 = Extremely dissatisfied to 10 = Extremely satisfied)



51%

% rating very easy or easy in how they find SRA to work with

The 2023 Miller Survey provided representatives from the nine 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

There was a particularly strong statement from milling companies about their confidence for the future of the Australian sugarcane industry over the next 12 months.

Almost all millers reported having a positive perspective on the future, with 51% reporting being ‘very positive’ about the future, a strong statement of optimism. The 2023 nett sentiment of +97 is an increase on the 2022 result (+88), which has been underpinned by a strong uplift in ‘very positive’ sentiment (up from 38%) suggesting a much more buoyant outlook among growers.

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

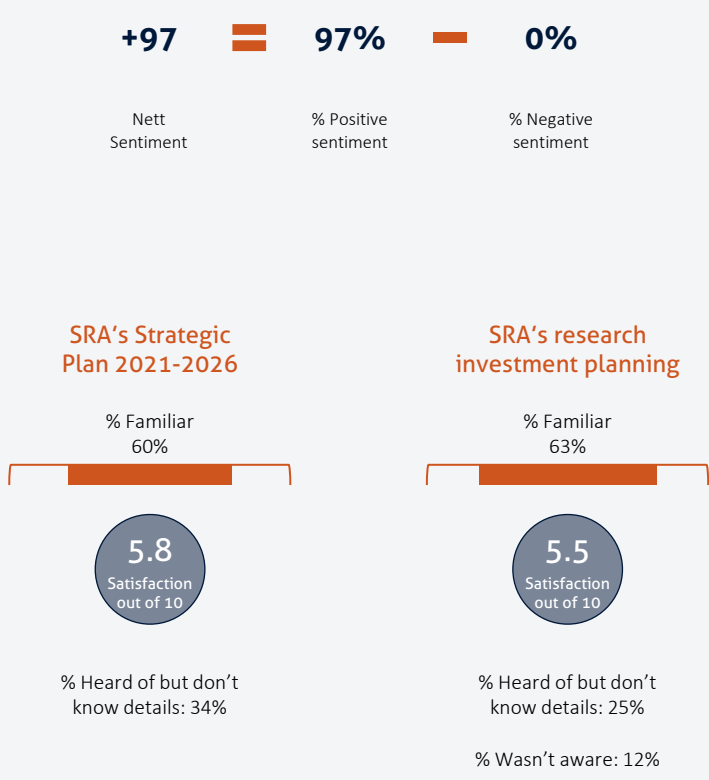
Ongoing task of investing to ensure millers connection to SRA’s industry and research plans

While milling companies continue to report a higher level of awareness of, and familiarity with SRA’s Strategic Plan and research investment planning than growers, there remains some miller representatives indicating little familiarity.

Familiarity with the strategic plans has increased slightly (60% up from 58% in 2022) but softened slightly for the investment planning (63% down from 71%). Satisfaction across both areas has fallen in 2023.

How to ‘tell the story’ and engage millers with these broad, high-level plans will be a challenge, but if successful can provide SRA with a strong platform to nurture existing miller relationships. Turnover of staff within milling companies can often diminish the relationship equity built up over time. It remains important to ensure any new staff are successfully ‘onboarded’ with information and understanding of the SRA planning and ambitions.

Creating and supporting new ‘onboarding’ processes may be an area that warrants consideration.



Miller satisfaction with their experiences with SRA

Based on the feedback provided, milling companies reported an overall satisfaction of 5.7 (on a rating scale of 0 – 10). This was slightly up on the 2022 result (up 0.1). Based on the ratings provided, we note that:

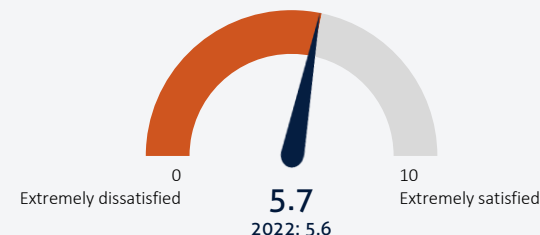
- n = 6 miller representatives (19%, up 6% on 2022) rated their satisfaction strongly (at 8, 9 or 10);
- n = 15 miller representatives (49%, down 3%) provided a modest rating (6 or 7); while
- n = 10 miller representatives (32%, down 3%) rated between 0 to 5.

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.

The results of the reported miller satisfaction with the various SRA touch points collected across the 2022 survey (as shown opposite) shows that:

- Results are softer in 2023 – as shown opposite, there have been some declines across almost all touchpoint measures.
- Milling companies provided a range of different satisfaction ratings (from 5.4 to 6.9) suggesting their ability to attach a different value to each of the touch points and experiences with SRA.
- As in 2022, satisfaction with the District Managers was the lowest of the areas rated (rating 5.4, down from 6.2 in 2022). As noted in the detail of this report, there are some challenges in increasing visibility of these key SRA staff. It's unclear how much focus District Managers have put on engaging with milling companies (ahead of their primary engagement with growers).
- Given the level of these ratings, there remains ample upside to improve these ratings while addressing the issues raised across this report.

Satisfaction with R&D levy investment



satisfaction with key miller touchpoints



* Average of satisfaction ratings provided underneath each topic.

† In 2022, satisfaction was asked across twelve products and services (2023: 11).

Other insights

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

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

About one in three respondents rated their overall satisfaction at 5 or less. Further analysis (provided on page 44 of the report) clearly shows these respondents rated lower on a range of the measures included in the survey. We note:
 - They indicated a much weaker familiarity with the various planning aspects of SRA’s activities.
 - They were much more critical around engagement – from District Managers, researchers, communications and the ease of working with SRA.
- There is an opportunity to create stronger visibility of, and engagement with, the SRA District Managers and Researchers.

The feedback during the survey indicated a low level of visibility and engagement with SRA’s District Managers and Researchers. This might be the result of a purposive focus on grower engagement, but appears to have had a negative impact on miller ratings on these two touchpoints.
- Is there a need to consider ‘onboarding’ induction for people new to the milling companies?

The drop in some of the familiarity measures and corresponding satisfaction metrics suggests that there may be people new to roles in milling companies may not be as familiar as those with a longer tenure. There may then be an opportunity to specifically ‘onboard’ new senior managers across the milling companies to induct them and create a strong and broad baseline understanding of the role, responsibilities and functions of SRA. This might help address some of the declines in the 2023 measures.

	Rating Sat with Levy Investment 0-5 (n = 10)	Rating Sat with Levy Investment 6-10 (n = 21)
Satisfaction with R&D levy investment	3.0	7.1
Advocacy of the services, products and information SRA provide	5.9	7.8
Familiar with SRA’s Strategic Plan 2021-2026	50%	67%
Satisfaction with SRA’s Strategic Plan 2021-2026	3.0	6.9
Familiar with SRA’s research investment planning	50%	67%
Satisfaction with SRA’s research investment planning	2.2	6.7
Familiar with SRA’s district plans	40%	81%
Satisfaction with SRA’s district plans	4.3	7.2

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

Observations

Based on the feedback provided in the 2023 Miller Survey, we note:

- ✓ Good coverage in 2023 of all 9 milling companies. This provides confidence about the representativeness of the results provided in the report.
- ✓ As noted in 2022, one of the foundations to building satisfaction is strengthening familiarity with what SRA does, the specifics of the various programs and an involvement with staff. While the efforts to date have gained some traction, there remains upside to investing further in these areas to improve miller satisfaction.

It is recommended that some alternate approaches / interventions are trialled to determine how best to 'cut through' and achieve the best outcomes.

- ✓ There appears to be an opportunity to broaden the profile of District Managers, while at the same time setting realistic expectations about their role and capabilities. Given District Managers are the 'shop front' for SRA, developing good relationships across the milling companies will be important.
- ✓ Closing the gap in ratings from across the different milling companies should be one of the focus responses from the feedback provided in the 2023 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. Closing the gap should translate to an uplift on the 2023 measures.

A review of the survey design for the Miller survey is warranted. Under the current design feedback is sought from a variety of company representatives. It's unclear whether this provides a mechanism that delivers the utility it suggests.

Consideration of whether to include CEOs in this study is warranted and if so whether a reduced and more focused set of questions would be more appropriate. Alternatively, seeking additional feedback from a consistent set of senior managers across each milling company might be another strategy for the survey design.

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



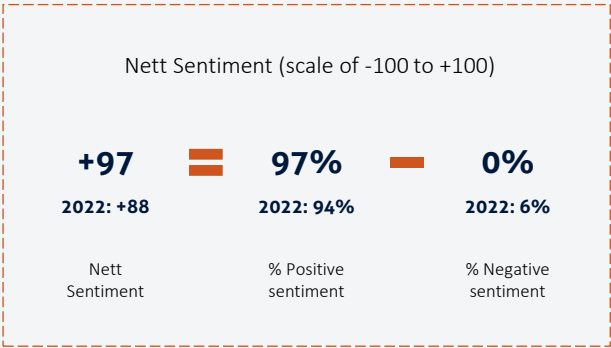
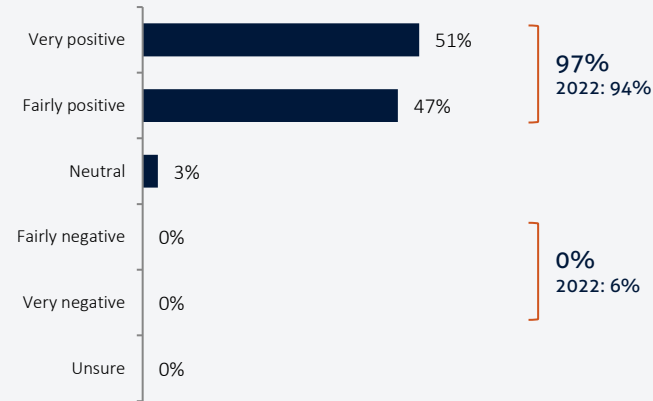
Detailed results

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 = 9 (n = 31 responses)



Milling companies reported a particularly strong and 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.

Detailed results

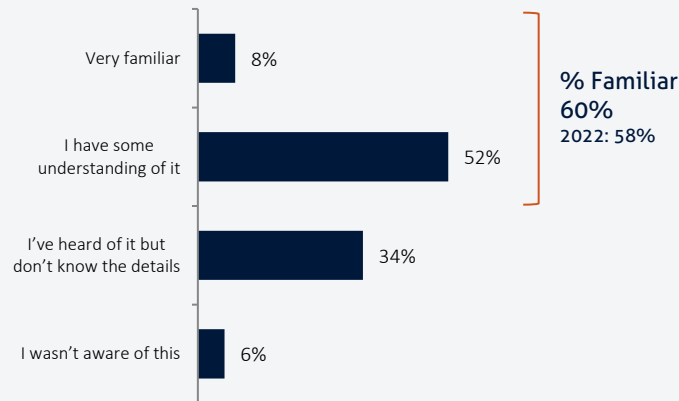
Connection to organisational goals

Familiarity and satisfaction of SRA's Strategic Plan

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.

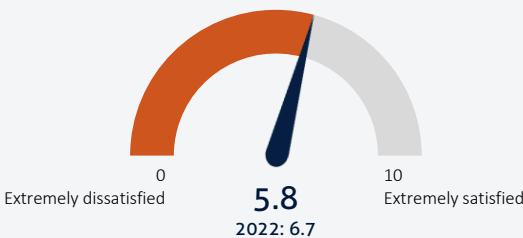
Q2. How familiar would you say you are of...
Base: All milling companies, n = 9 (n = 31 responses)

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

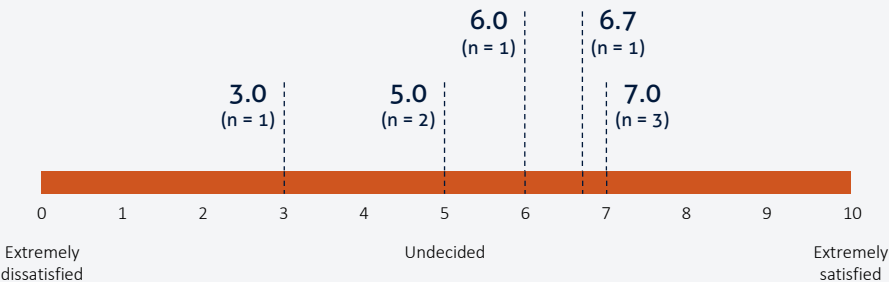


Q3. And, overall, how satisfied are you that these address the needs of your company and district(s) where your mill(s) operate(s)?
Base: All milling companies who are at least somewhat familiar with SRA's efforts (excluding "Can't say" answers), n varies

SRA's Strategic Plan 2021-2026
(n = 8 milling companies)



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



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.

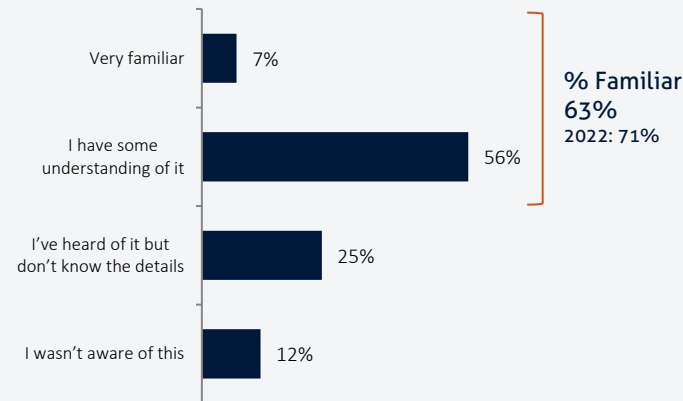
Q2. How familiar would you say you are of...

Base: All milling companies, n = 9 (n = 31 responses)

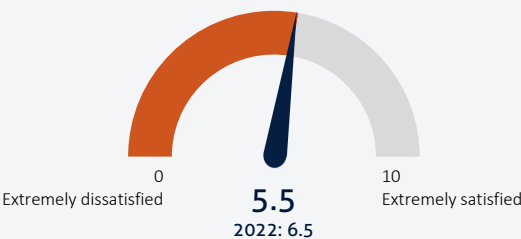
Q3. And, overall, how satisfied are you that these address the needs of your company and district(s) where your mill(s) operate(s)?

Base: All milling companies who are at least somewhat familiar with SRA’s efforts (excluding “Can’t say” answers), n varies

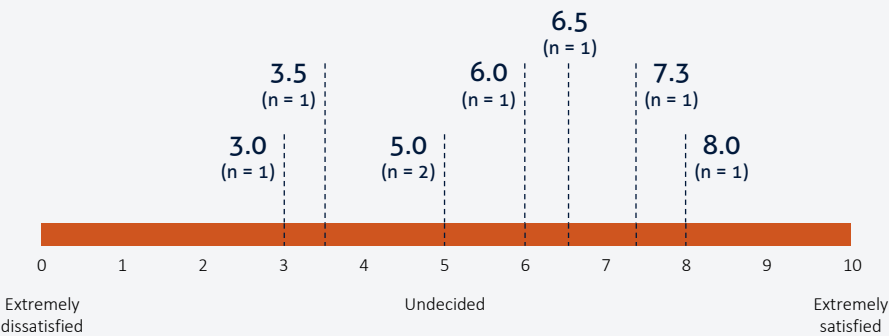
SRA’s research investment planning



SRA’s research investment planning
(n = 8 milling companies)



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



Detailed results

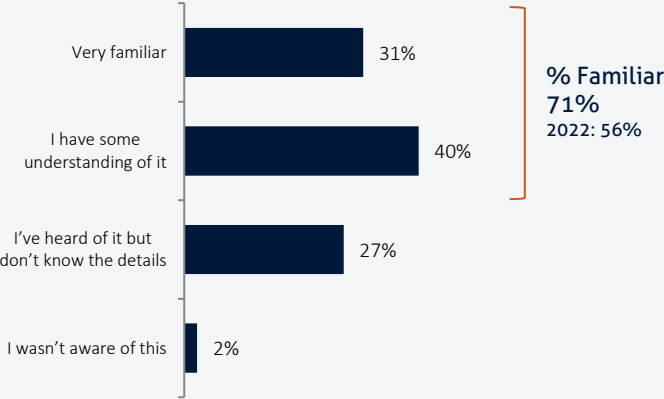
Perceptions of district engagement

Perceptions of district engagement

Familiarity and satisfaction with SRA's district plans

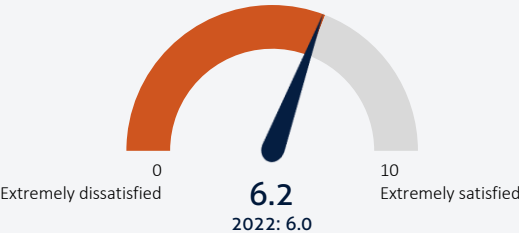
Q2. How familiar would you say you are of...
Base: All milling companies, n = 9 (n = 31 responses)

SRA's district plans to target productivity improvements

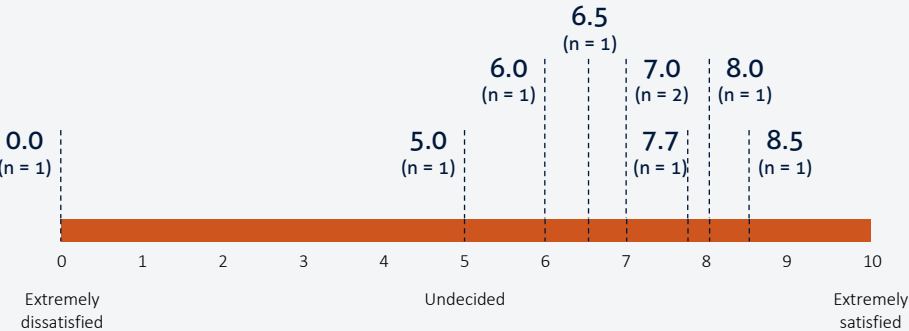


Q3. And, overall, how satisfied are you that these address the needs of your company and district(s) where your mill(s) operate(s)?
Base: All milling companies who are at least somewhat familiar with SRA's efforts (excluding "Can't say" answers), n varies

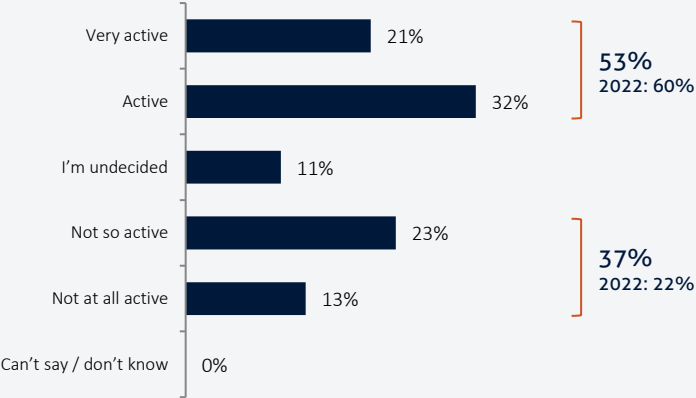
SRA's district plans
(n = 9 milling companies)



Range of mean results across milling companies (n = 9)



Q4. 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 = 9 (n = 31 responses)



There has been a softening in the proportion of milling company representatives completing the survey describing SRA staff as 'active' in engaging in industry matters.

An increased proportion offered a different, more critical perspective.

While sample sizes are small, it would be prudent to keep a 'watching brief' over this measure and also explore other feedback to determine if there are opportunities to increase the visibility of SRA staff.

Perceptions of district engagement

Experience with SRA's district managers

Q5. The following question is about your experience with SRA's district managers.
Overall, how satisfied are you...
Base: All milling companies (excluding "Can't say" answers), n varies



5.4
2022: 6.2

Average of the
four satisfaction
ratings

Feedback was sought from milling company representatives who rated their satisfaction at 5 or below on any of the measures opposite.

This is what they had to say . . .

Q6. You rated less than satisfied on at least one of the aspects of the experience.
Why do you say that?
Base: All milling companies who rated at least one aspect between 0-5 AND provided a valid response, n = 9 (n = 15 responses)

- "I wouldn't disagree there are challenges to the sugarcane industry and the issues on the farm side and I don't think they're being considered, there is no recognition of the milling component, lack of support, generally on the mills."
- "I have been in the industry for 12 years and know that some have never seen the district managers and don't know what they are. From what I understand they don't go outside the growing sector but on the milling side they are going, because don't know what they provide growers they have a responsibility to be there with them but not in a very visible way."
- "I haven't seen a district manager for the last 3 years in my current position and because I haven't seen anybody - don't know what they're doing when they're not here. On the mill side they are very visible but growers don't know them. I haven't had any information from them."
- "I wouldn't even know who they are, have never met them and had no contact from any district managers. I'm only going to report back from my fellow manager in the sector here, that's had some contact, so relying on that feedback. Purely because of the feedback I have had from growers but that's what's important. I don't know, again because I haven't had interaction with them, my understanding is that the district has in there is no interaction with the managers with the growers - maybe associated with milling issues in the district."
- "Only because there aren't any. Lack of contact and engagement stopped all any evidence of support. For the mill side of things there is a lack of information available but on the growing side it is OK."
- "We do not SRA district managers at all, have limited to no interaction with them. No interaction is a bit harder than to be transparent. From growers perspective there is some interaction and have seen SRA at the grower meetings but on the mill perspective very little interaction, there's only a connection with SRA. I wouldn't know because I don't have any interaction with them."
- "I don't think I have seen district managers engage on milling aspects, certainly engage with growers & on agronomy but no connection with milling management. Don't think they have any connection with milling activities, with growing side issues. There is a complete disconnect on the growing side it is OK but the milling side is not support."

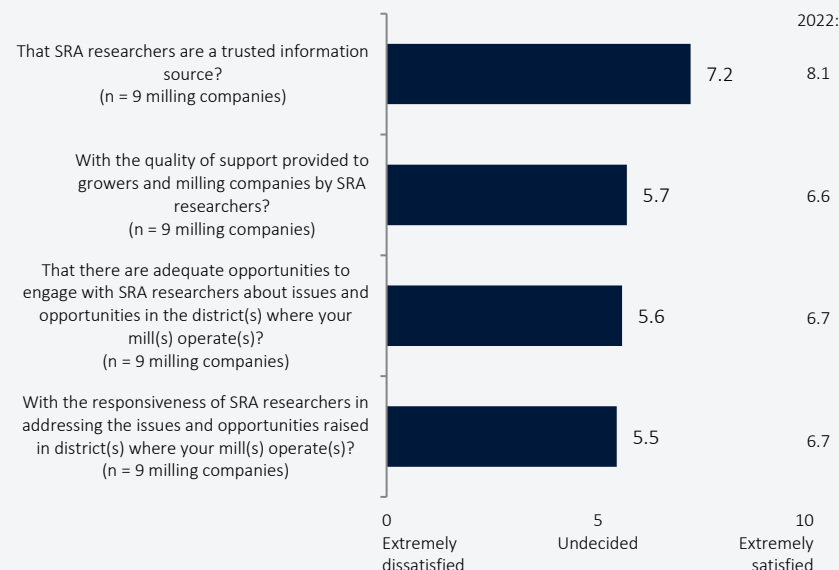
Perceptions of district engagement

Experience with SRA's researchers

Q7. The following question is about your experience with SRA's researchers.

Overall, how satisfied are you...

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



6.0

2022: 7.0

Average of the
four satisfaction
ratings

Feedback was sought from milling company representatives who rated their satisfaction at 5 or below on any of the measures opposite.

This is what they had to say

Q8. You rated less than satisfied on at least one of the aspects of the experience.

Why do you say that?

Base: All milling companies who rated at least one aspect between 0-5 AND provided a valid response.

n = 8 (n = 13 responses)

¹Confidential survey data from respondents. Very little information supported by SAA, however, confirms the small, however not trivial, the influence of things. As the survey revealed little growing sector, there had been a lot of activity in the manufacturing sector but very little in the mining sector.¹²

"You might as well not do anything with them & their search is more or less futility. If no scientist is interested in the response, how is it going to be supported, then the growing sector there is no reason for them to do research on people. They are doing the search but to do what they are supposed to."

It's how you define adequate opportunities, is how that they create, or others can have to play upon (2004). They also use a variety of strategies with a "We-Care" tag like "We-Care About You."

[illegible]

"The research definitely was grounded since we hired an manager-based team working directly. Researchers had been responsible for the manager's information being disseminated for different districts where there is a manager. The first 2004 survey did it differently. It was going to be done in our area. It was an attempt to get the manager to be a more intelligent variable. What information is going to come out when I present managers we have to know what information, the analysis that is going to be done that information is going to be used or not. It was a very difficult situation."

¹⁰Whereas we sometimes don't favor the presence of BSA in our venue and would like a more balanced distribution of services, they are not present enough here in the area. If they are not here, they do not know what is relevant for our area. I have noticed the difference between support provided by larger company that supports me.¹¹

"They are invested, knowledge isn't just a source where the money already is, still directing money to R&D when it could be put elsewhere. The safety processes & validation - it can go well through the development process and find that the wrong equipment is chosen or that the 100% & 10% tests to be undertaken are in the wrong."

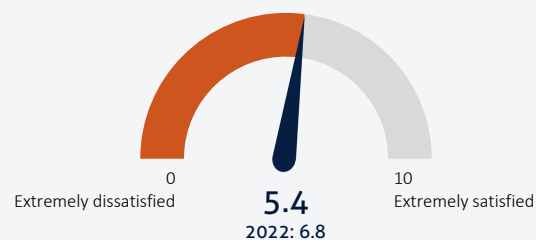
Detailed results

Perceptions of SRA partnership

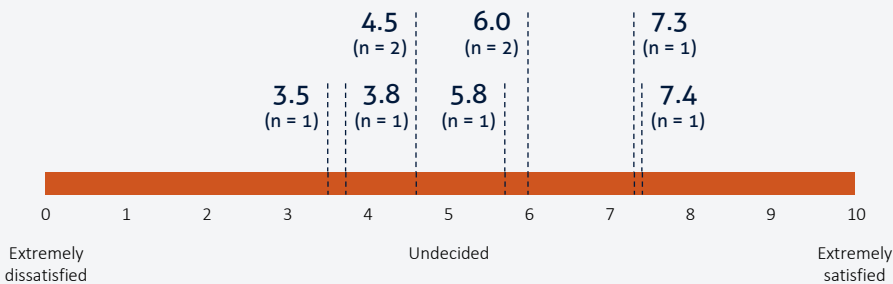
Perceptions of SRA partnership

Satisfaction with SRA's engagement

Q9. Overall, how satisfied are you with SRA's engagement with your company about new sugarcane research and district issues and opportunities?
Base: All milling companies (excluding "Can't say" answers), n = 9 (n = 31 responses)



Range of mean results across milling companies (n = 9)

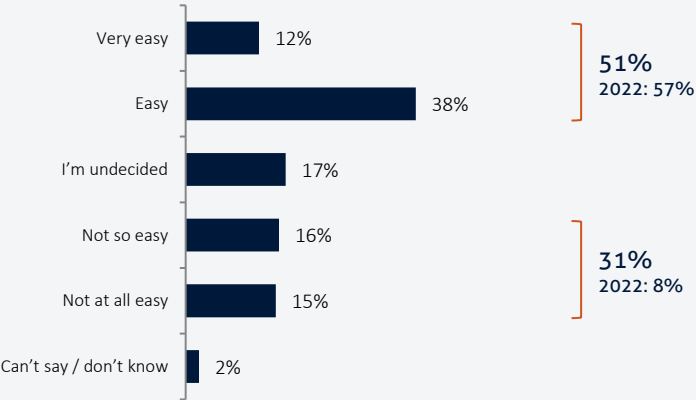


Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 0 through to a rating of 9.

Ease of working with SRA and collaboration with others

Q10. How easy do you find SRA to work with?

Base: All milling companies, n = 9 (n = 31 responses)

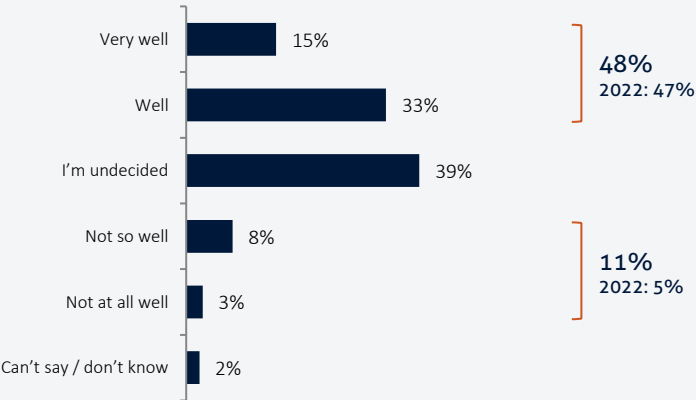


Generally, milling companies indicated that SRA was easy to work with. However, there are more companies this year indicating an opposing view.

This is an important foundational characteristic of the SRA-Miller (and any) business to business relationship. This result should remain top of mind in the engagement strategy SRA deploys.

Q12. And in your view, how well do you think SRA collaborates with other organisations and industry stakeholders?

Base: All milling companies, n = 9 (n = 31 responses)



While most responded positively to how SRA collaborates across the industry, there continues to be a sizeable cohort 'sitting on the fence'.

Detailed results

Perception about SRA products and services

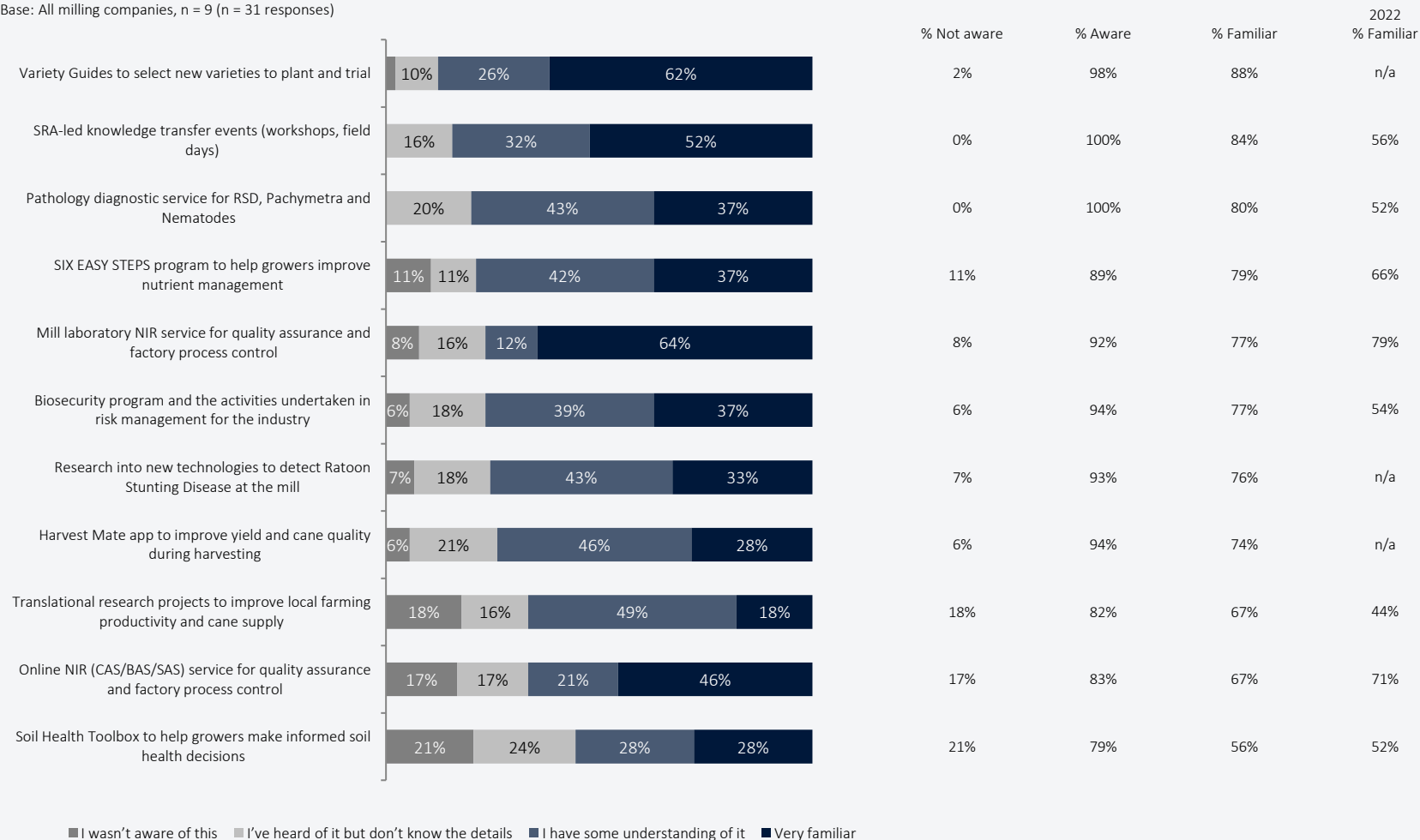
Perceptions about SRA products and services

Familiarity of SRA's products and services

SRA provides a range of different products and services to growers and millers. SRA recognises investment in these products and services is highly important to improve the reliability of cane supply. The next questions look to understand your experiences with some of these offerings.

Q13. How familiar would you say you are of...

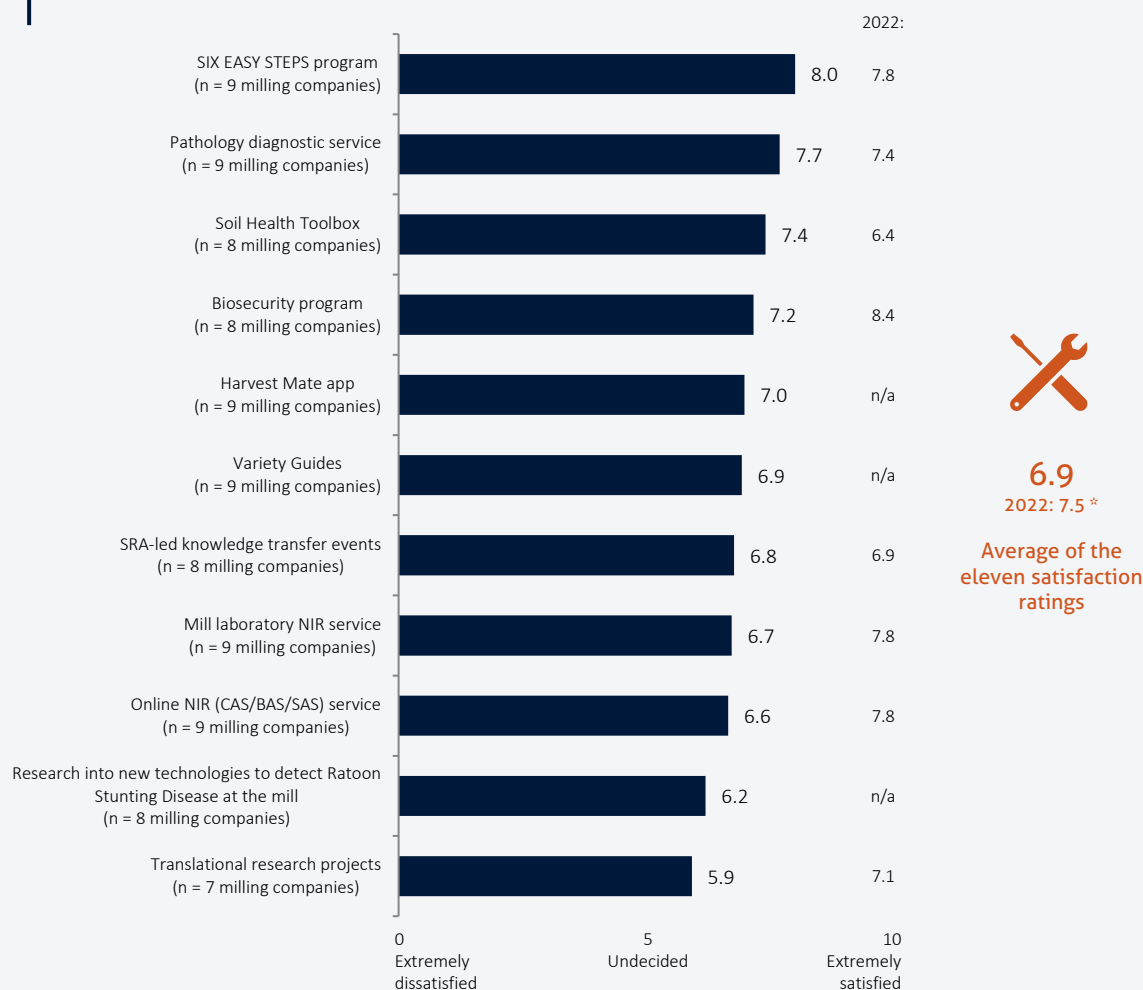
Base: All milling companies, n = 9 (n = 31 responses)



Satisfaction with SRA's products and services

Q14. And, overall, how satisfied are you that these address the needs of your company...

Base: All milling companies who are at least somewhat familiar with SRA's products/services (excluding "Can't say" answers), n varies



Feedback was sought from milling company representatives who rated their satisfaction at 5 or below on any of the measures opposite.

This is what they had to say

Q15. You rated less than satisfied on the value offered to your company on at least one of the products/services. Why do you say that?

Base: All milling companies who rated at least one aspect between 0-5 AND provided a valid response, n = 9 (n = 15 responses)

That said, there is much good to be found in the literature on this issue. Indeed, discussions, or anything as sophisticated as what we need to do along, don't have to result in any consensus, just as we need to be doing something to support a cause, must pursue that cause, and deal with the growing group of homogeneous groups rather than with individual groups or individuals. Some of the current literature on this subject, no less, just isn't so much.¹²

*TRC has only initial process to measure the value. Confide extension of the research as much as they should.²

"They don't do a lot of work in the area and tend to be single-faceted in their concerns. It's a narrow, limited expertise. Institutions and researchers not located where we are, National Defense University and DOD, are looking for studies, not data, and they get out of Washington. It's an area where they want to get solid data. It's also the growing sector, very limited for the military sector."

¹¹ Because there is lack of awareness of where that research is, haven't received much information from this program."

¹⁰ "Worship is not an end in itself and is not a requirement that is the foundational basis of existence; it's merely a ritual, Friday or just they should be out there."

¹Harvard Fellow, 1986-1987; now at the University of Michigan.

¹² In general, it was found that the impact was negative.

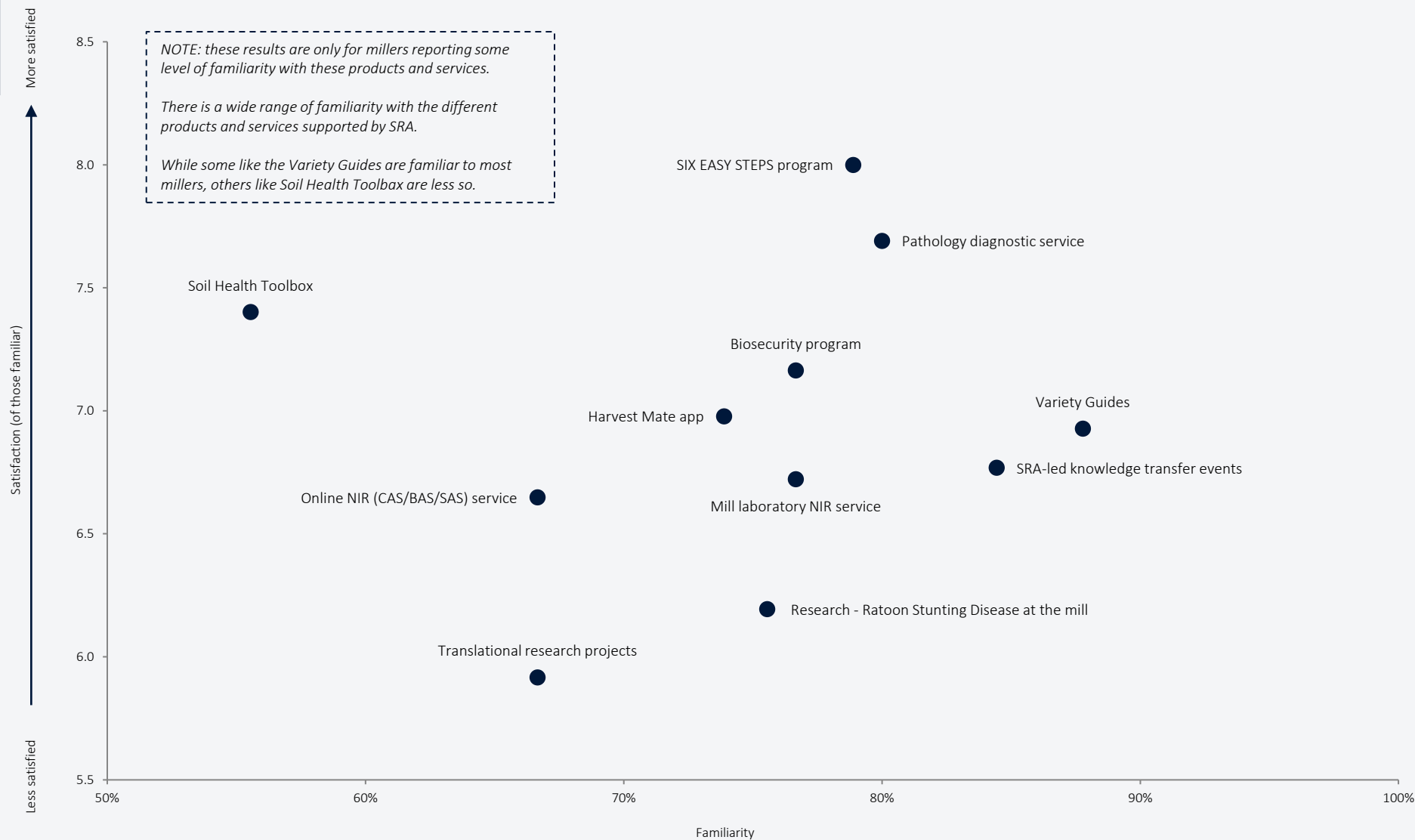
Tablets for the treatment of schizophrenia are not a panacea. They are a tool, and like all tools, they must be used properly. The use of tablets for the treatment of schizophrenia is a complex task, and it is essential that patients and their families be educated about the proper use of these medications. The use of tablets for the treatment of schizophrenia is a complex task, and it is essential that patients and their families be educated about the proper use of these medications.

[illegible]

* In 2022, satisfaction was asked across twelve products and services (2023: 11).

Perceptions about SRA products and services

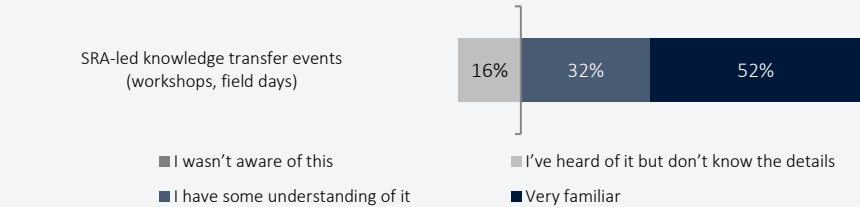
Comparison of familiarity and satisfaction



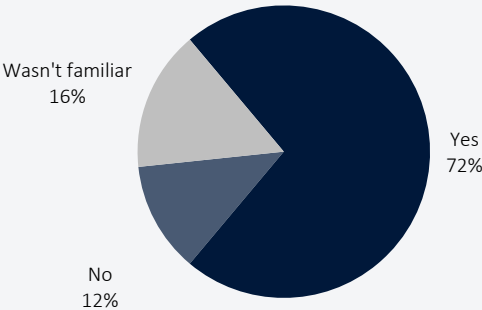
Perceptions about SRA products and services

Attending SRA-led knowledge transfer events

Q13. How familiar would you say you are of...
Base: All milling companies, n = 9 (n = 31 responses)



Q16. Have you attended any SRA-led knowledge transfer events in the last 12 months?
Base: All milling companies, n = 9 (n = 31 responses)






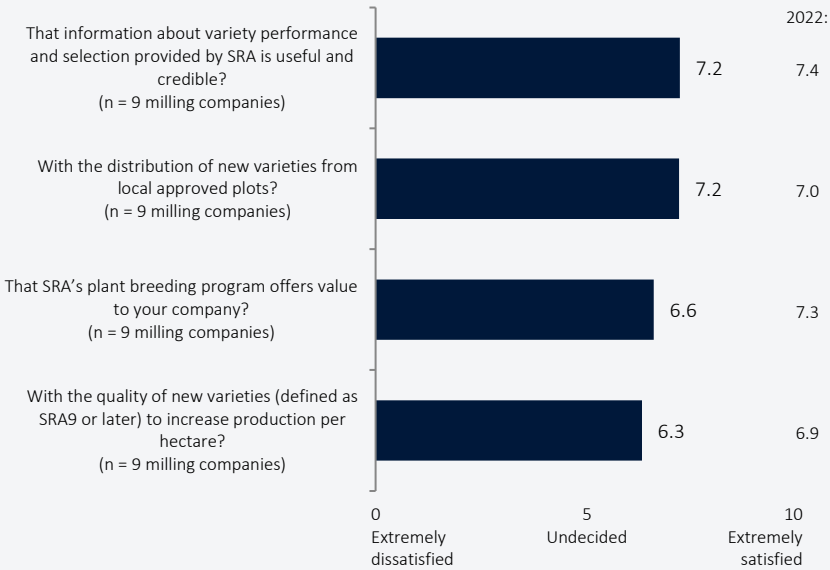
Detailed results

Perceptions about plant breeding program and new varieties

Perceptions about plant breeding program and new varieties

Satisfaction with SRA’s plant breeding program

Q17. Regarding SRA’s plant breeding program, overall, how satisfied are you...
Base: All milling companies (excluding “Can’t say” answers), n varies



6.9
2022: 7.1
Average of the four satisfaction ratings

Perceptions about plant breeding program and new varieties

Helping growers select varieties for their farm

Q18. 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 = 9 (n = 31 responses)

"Better communication to growers what variety is best for the grower, farm, or what growers indicate in that decision process."

"Communication, showing them not telling them, more demonstration plots, more field days, more visits."

"Showing the best varieties that they would go to consider what their requirements - their levels & how."

"To be having better perspective information about the suitability of the cane."

"Testing more targeted varieties for needs of smaller specific areas not just whole distribution regions. Areas for growers to choose varieties that are suited to specific conditions."

"Getting the plant breeding programs focus on certain varieties (which they will need) and ensure that with the sugar content and the resistance to pests. Length of time to get new varieties to market needs to be speeded up with the new technology the time frame to get to market for 3-5 years."

"Not to have a good variety that before you can tell someone a grower is not actually going anywhere with varieties just coming out there, need to be in action of commercial technology, need to have trials published technology to understand and to know & to have a full understanding and to have a full understanding."

"Growers can only get a variety available, showing the cane it takes a season to produce generating new varieties, the time to get from potential to commercial production variety is too long, it needs to be reduced at least."

"Have a better understanding of the cane varieties will impact the milling operations and ensuring minimal impacts on individual varieties is increased."

"Have a good background on what we currently grow, the decision process for varieties that we can get to release stages without enough information on what the requirements in ending the product - the milling, how value, the 12 years to get to get a new variety is not enough."

"Having more local knowledge of individual variety performance. How it performs in that local area rather than generally."

"To be able to bring what they know is good and what more can be done, can only present them with the information and with the possible impacts and changes they make to their bottom line."

"They producing good varieties that they grow on."

"Mainly take into account that there is a milling side, no matter how high the sugar, if there is high levels of CP, that is not good for the mill."

"Make the growers of what varieties are better in what will, suitability issues. Estimating how long it will take to get to the market, sugar content."

"More information about breeding for millers."

"More varieties that are suitable, more research into the cane being grown, the sugar content is not good for the miller variety. In our area many C&F cane growers are not in the market."

"Some less more that they can do. Continue to provide available performance data. To lead us ways to help the variety, get into the commercial side and that better and more to the growers of getting that information. Life better to commercial mill data analysis of more information to help growers & spread that information - more testing, trials, making websites, see more of the non-commercial side of the growers."

"There is a lot of different millers, there is a concern that variety that does well in one area is selected widely because some growers have had good results from that but it is not necessarily the same for others, they need information that the variety is suitable for their local mill type."

"They could be doing some research on the cane to provide that information. To determine whether a cane is really suitable for the mill, some growers are not getting information in different soils, environments, changing environments to determine suitability of varieties."

"They do a pretty good job, without spending huge amount of money it is difficult to say better but they do a good job with the resources they have."

"They need to be giving the grower the benefits of supplying good millable cane rather than just supplying high volume and high COC cane and the benefits of doing that."

"They need to have or put more trials on plots in individual areas within the districts, more trial plots in the different areas within the districts."

"To do local trials to make sure the variety performs in the area and growers can see results. Some growers are local growers & consultants to understand the soil and more things for individual areas."

"Trials - more sites, bigger plots, analyse the trials longer for the individual varieties and to make sure they are profitable, always, results to last."

"What they are doing is a bit more information about the cane & the cane for the miller to make the sugar."

"Would be good to have more information, more of the cane & the cane information, more information about the cane, more information about the cane, more information about the cane."

Detailed results

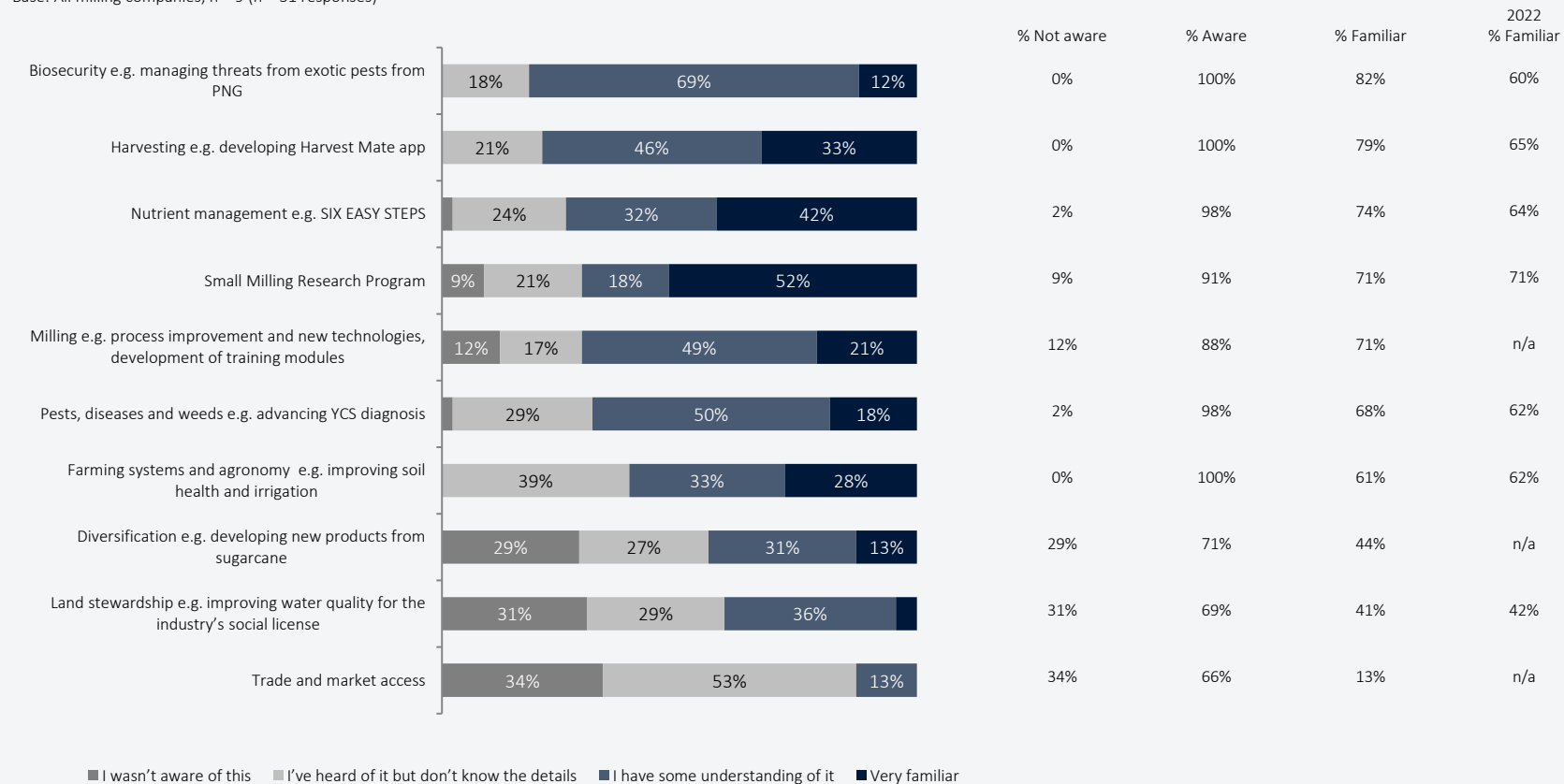
Perceptions about research portfolio

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. SRA recognises investment in many of these areas is highly important to increase production throughput for milling companies. SRA funded research in agronomy and farming systems, harvesting, and disease and weed control are examples of research areas in which SRA is targeting production gains.

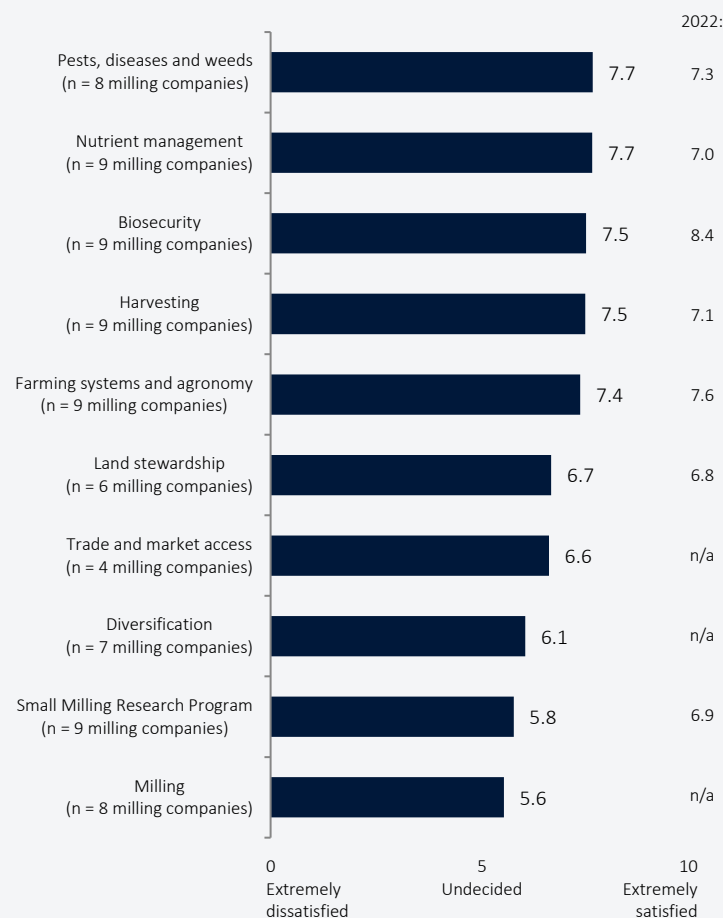
Q19. How familiar would you say you are of the following areas of research funded by SRA?

Base: All milling companies, n = 9 (n = 31 responses)



Q20. Overall, how satisfied are you that SRA's investment in these areas of research offer value to your company and the industry?

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



Feedback was sought from milling company representatives who rated their satisfaction at 5 or below on any of the measures opposite.

This is what they had to say . . .

Q21. You rated less than satisfied on the value offered to your company and the industry on at least one of the areas of research.

Why do you say that?

Base: All milling companies who rated at least one area between 0-5 AND provided a valid response, n = 7 (n = 12 responses)

"I question whether they are targeting research programs we should be focusing on for the milling industry. Several of them are much more about the general industry than the milling industry generally. There is some good research in identifying the gaps, but it is not happening in other countries such as India, so we are being left behind. Look at South America USA and for premiumisation rather than the general market where we're competing well."

"Total milling - there are a lot of projects, a lot of industry requirements when projects have been submitted. Those projects are designed to address a lot of issues in the sector but it is not clear if they are being implemented and subsequently, how they are addressing the issues. Diversification - it has been hard to meet the requirements of the industry."

"The way research is funded with research for milling & processing are inadequately funded and the distribution of research funding across the sector is not growing & agriculture is not at the expense of milling and processing & health research community. Being part of the milling & processing industry, the milling research community has a significant financial burden and it is impacting their ability to have a good research program. The research is being influenced by the larger milling organizations and opportunities for smaller companies to advance research which may be beneficial to their operations is being limited. The evidence application (project) for projects is inconsistent for smaller organizations."

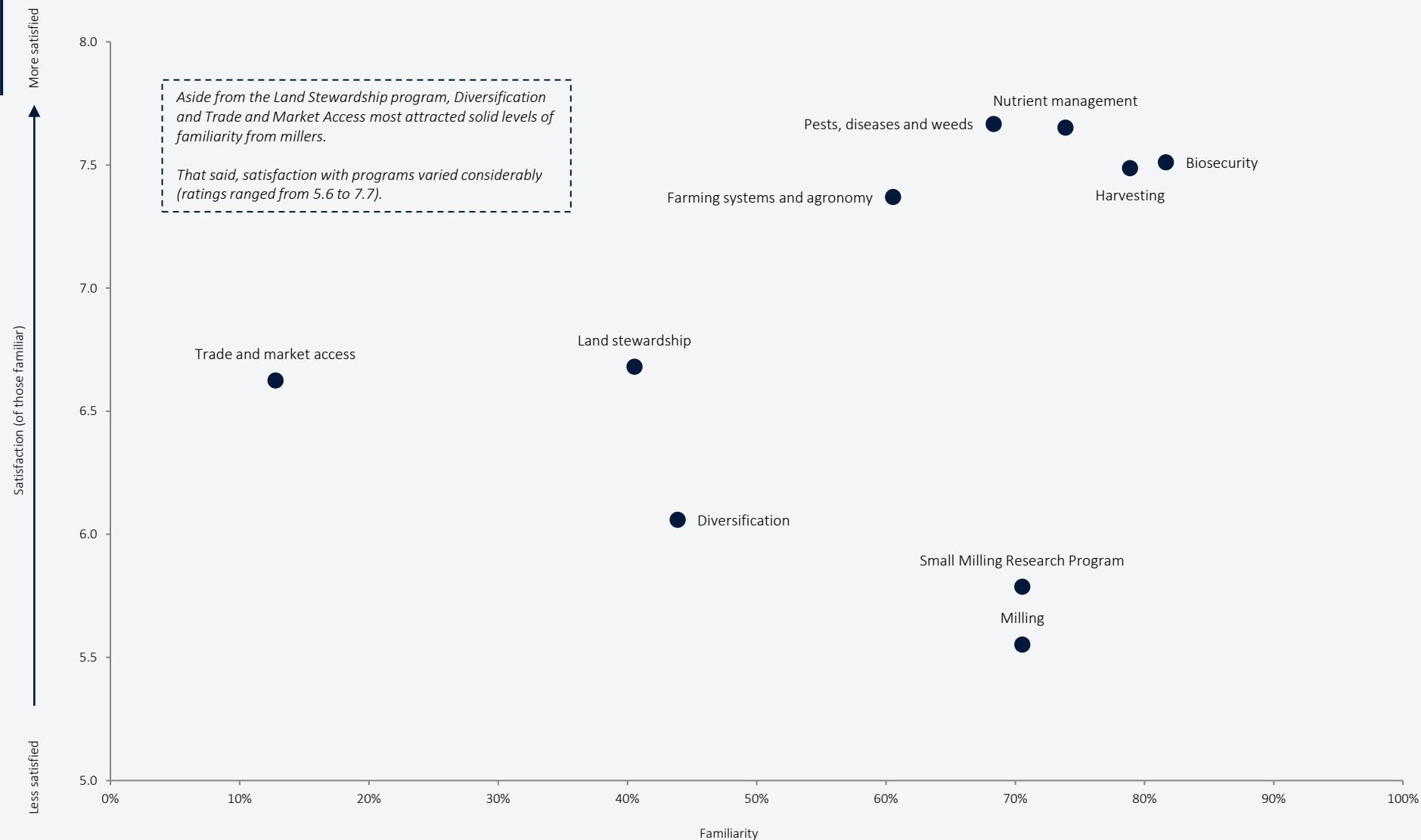
"The level of funding that is given is very low, what is less, most of what they do is as milling is actually growing and research, actual amount is far less than what is required. Don't think the programs big enough, not enough capital, will provide the people but not enough support and funding in terms of & by the time the approach is too long in the future. There are other people who play in the field, manufacturing, there are no funds to get the things done together, there are no products but it needs to be at market scale to get the distribution in terms of processing & milling is not."

"Milling - because we have given everything over the last 12 months from primary investment, biosecurity - don't think we have with biosecurity as much as we do. Small milling - don't see us having gained anything over the last 12 months from primary investment."

"Milling - don't think there is a good enough understanding of the position required for milling & what we really need. Small milling - regarded as being a bit dysfunctional, didn't have information on products and so on over processing, and so on over the program and got in place of it, things that, expectations are too high of the funding."

Perceptions about research portfolio

Comparison of familiarity and satisfaction



Perceptions about research portfolio

Areas of investment for additional research

Q31. If SRA had more funding and could invest in additional research, which areas would add the most value to your company?

Base: All milling companies who provided a valid response, n = 9 (n = 31 responses)

"About diversification and reduction of operating costs- maintenance costs- personnel- we compare against that of third world countries and emerging economies, we need to think how we become more productive with the personnel base & the milling facilities for them. Because less is more with. Process efficiency - need to determine interdependent terms of the green economy."

"Researching to make greater return from the whole plant - sustainable water facility other things that from the miller's point, investment in the future maintaining the most value out of the cane plant."

"Address harvesting faster through improved harvester technology, measures that the harvesters harvest time, design changes to improve efficiency, much more yield generated made out of what than in improved varieties - e.g. could give you 20% variety improvements but must consider that they might harvesting improvements."

"Areas of research that bring more yield, that will supply moisture to mills - packages for varieties that produce more yield in other areas of research as well."

"Around the small millers and managers and look at what is happening in other parts of the world such as the new technology developed in used in Thailand and Brazil."

"Blended stuff, more stuff for sugar super cane, we are looking for the next step change, we have refined things enough, what is going to take us forward to the next 20 years."

"Cane growing for miller benefits, developing for durability, yield - better per ha."

"CO-products - greater diversity and higher value return from secondary products which would help growers in the industry."

"Investment, value adding to the sugarcane plant, is sugar diversification something that we haven't focused on for a long time, in terms of diversification with the basic cane to make more value added and to diversify our business based on to dairy, meat, other understanding of what MA is doing in that space, but obviously it's difficult to do the sugar price has been something that's been a problem since 2012 - over time we have lost something that adds to the sugar cane plant. From a research perspective there is a lot that has been done but it doesn't convert into a better cane problem in the question is about what is doing research in diversification, so research question - why has in the diversification research contribution is commercial outcome reality."

"Harvesting - needs a return, the best programme potential to do much greater benefit if the operations were developed - need to allocate funds and time and people to develop the need to plan to replace the knowledge base that is heading towards retirement."

"High yielding sustainable fibre uses, anything that would improve cane growing in the field, anything that supports cane growers and farmers that are involved in the cane and cane growers away from about further coordinated and better transport, efficiency, and how the cane can support that change."

"In the area of productivity - volume of cane and decreasing input costs, such as general operations and maintenance, there is a lot of things to do and that is maintenance costs, which is reducing that."

"Milling efficiency - Productivity based on the miller's point."

"Milling research - improved on the production side of the milling process."

"More of the process - it's a point from the miller's perspective. The growing threat from diseases such as ABCD, Fusarium, Ascochyta blight, getting control out, higher fibre content - being control with technology, looking at the whole plant because cane isn't dead."

"Research in the future, not so much diversity but more of the looked side of how we transform the industry."

"New technologies and innovation in the miller's point, and in the milling process generally."

"We don't think SRA should have more funding."

"Improving the cane, cost management, seed management, human management, harvesting efficiency."

"Plant breeding & yield per hectare per hectare (cane & sugar)"

"Fast breeding improvements, improved milling technology and the changing face of the sugar market, how to spend on the cane people but with improved productivity, a more basic research permanent, so operations and how to achieve that."

"That working in optimisation of the mill, mill processing efficiency, cane productivity - higher sugar content & high sugar content."

"There is adequate funding supplied for the industry SRA needs to be more focal in the manner in which they operate, manufacturing needs to be distributed in the milling sector to allow gains in productivity and efficiency in order to maintain the profitability of the milling companies. Research in the cane sector has explored an infrastructure unrelated with the process issues, which evaluation of opportunities of using the cane for something other than just a process generation, research in the growing opportunities of factory process streams e.g. just in time and the benefits that by-product of ethanol could offer as well as the cane industry, research in the growing technology currently in use and internationally but not in the cane industry in the Australian milling industry."

"Variety selection - trying to get back to variety selection & then looking at other products like just sugar is not what we are getting to the mill, it is a different product harvesting system which is more of the ethanol and things etc."

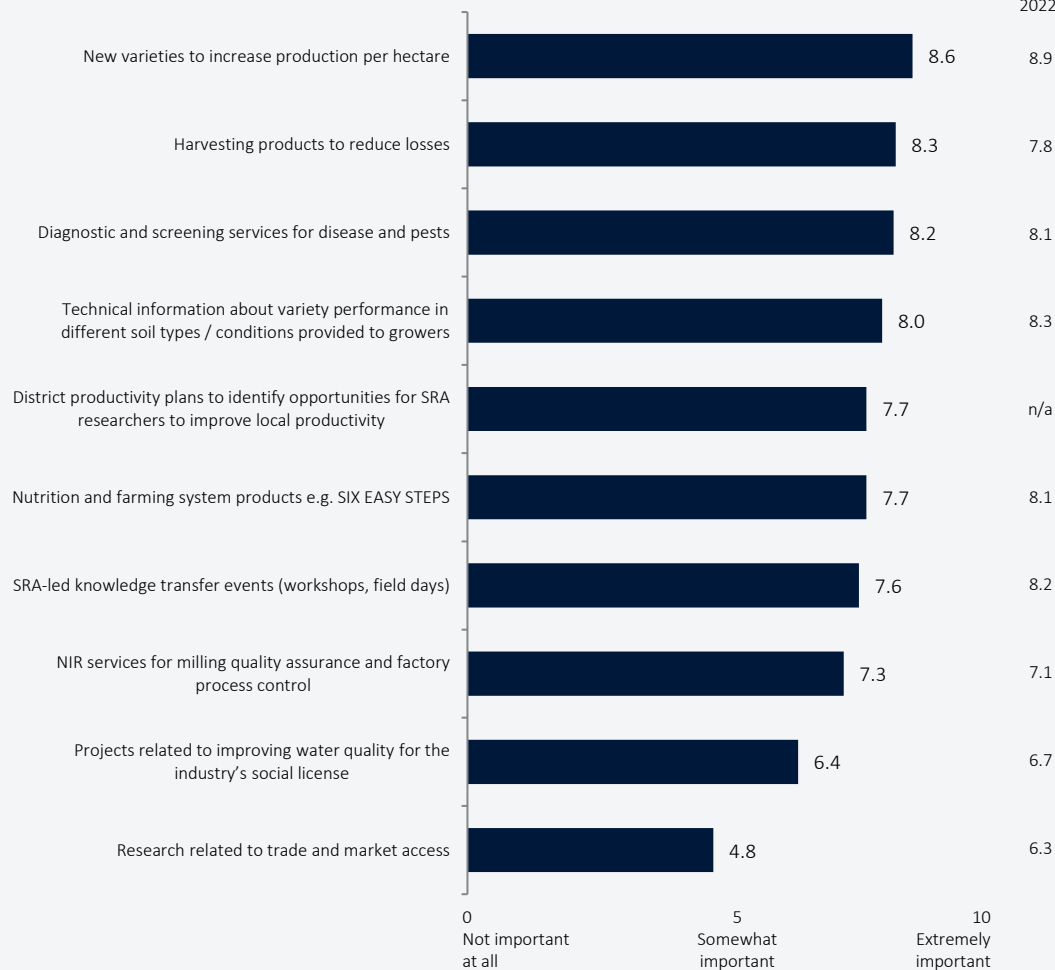
"Areas of change where our yields are sitting at a good place, there is a one measure per person, however we do that, there are some things that are not on production, and some of the production and some of the production could be continuously improved with from operational and maintenance perspective. Management of the changing environment for people resources & jobs."

Importance of areas in increasing production and profitability

Q22. How important do you think the following areas of research and development are in increasing production throughput and profitability for milling companies?

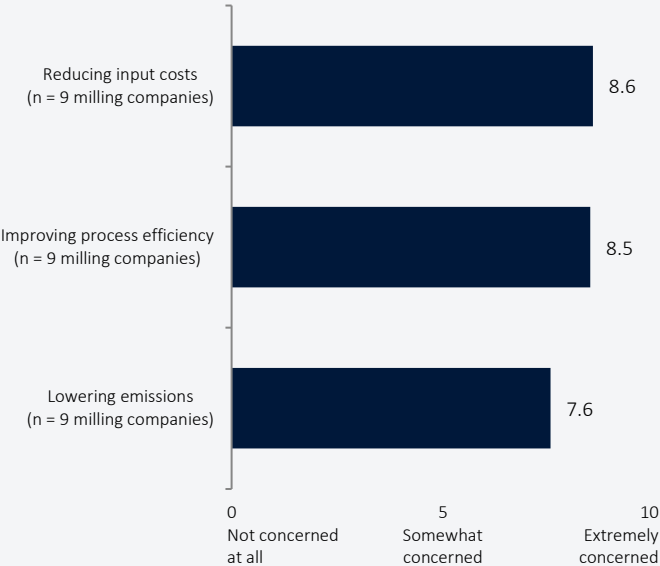
Base: All milling companies (excluding "Can't say" answers), n varies

2022:



Areas of concern for SRA’s research investment planning

Q23. How concerned is your company about needing to find solutions to the following areas...
Base: All milling companies (excluding “Can’t say” answers), n varies



Q24. Are there any other areas that your company is concerned about that SRA could consider in their research investment planning?
Base: All milling companies who rated at least one area between 0-5 AND provided a valid response, n = 9 (n = 31 responses)

- "Responding to new technology and mills."
- "All the areas are covered. I don't think there is enough focus on the millside in terms of research investment."
- "Be more focused on core roles - variety development & work shops & field days & drop the industrialised stuff."
- "Core supply. Total losses performance & total harvest through the mill as increased losses of sugar per feature through the mill. The mill needs total coverage of core supply & quality & reliable core supply. We need to be able to harvest the mill."
- "Carbon sequestration through different farming practices getting those levels down, some work on the field - addressing some of the transport under farm equipment, CO-product development, looking at replacing the reliance on control of the food fuels, ferment chemicals and fermentation technology to make higher value products from sugar - some opportunities with water & waste water."
- "Development of alternative products for agribusiness, value adding to the commodity sugar."
- "Development of improved harvesters design to reduce infiltration losses - work with the manufacturers to drive this."
- "Diversification & alternative revenue streams from sugar."
- "Development of efficient alternative products."
- "Education. Mills and the industry have been struggling with this for a long time, there is no effective extension strategy to turn the research into commercial value, the connection between research and implementation is poor."
- "Harvesting. It is a big problem but they need to think about harvesting a plant but they are successful, economic strategies, looking at the millside, CO-products, income adding."
- "Harvesting lost potential. It is one of the biggest issues we have, particularly harvesting & returning BOD - education doesn't about the importance of sugar & BOD. Particularly for millside about sugar knowledge, losing lost through milling knowledge the millside, the depth of knowledge has gone."
- "How to get to zero emissions. Don't believe the farmers really understand and what needs to be done to get there."
- "International learning. Bringing in knowledge from other sugar producing countries such as Brazil & Thailand - sharing of knowledge, RFO model exchange to spread the Australian industry."
- "Investment in reducing emissions, new products, new technologies etc. which underpins the business."



Detailed results

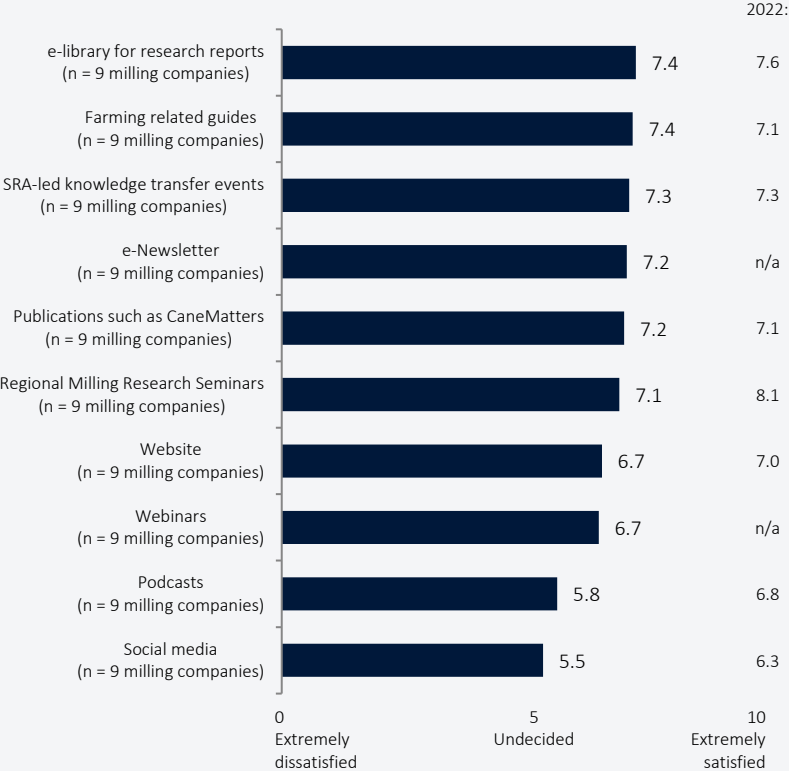
Communication needs and experiences

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.

Q25. How satisfied are you with the following communication channels to access information about sugarcane farming and milling research?

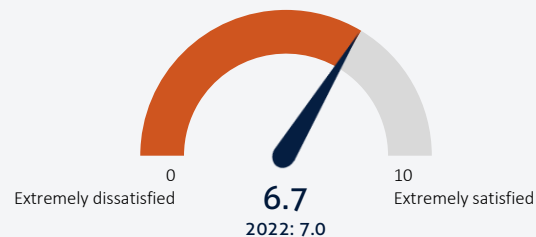
Base: All milling companies (excluding "Can't say" answers), n varies



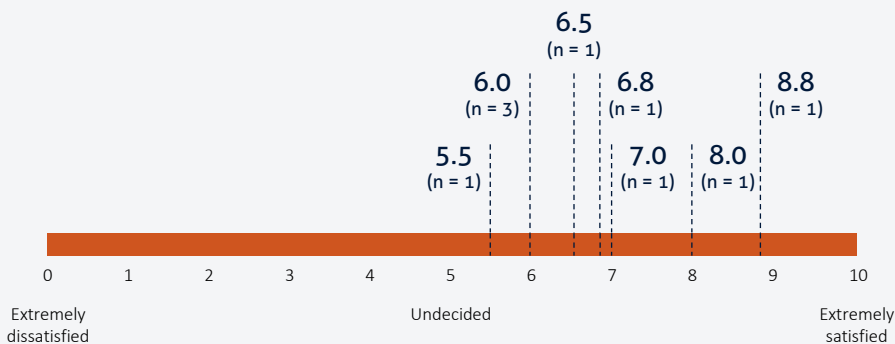
Satisfaction with the quality of SRA communications

Q26. How satisfied are you with the quality of SRA communications for providing useful and credible information?

Base: All milling companies (excluding “Can’t say” answers), n = 9 (n = 31 responses)



Range of mean results across milling companies (n = 9)



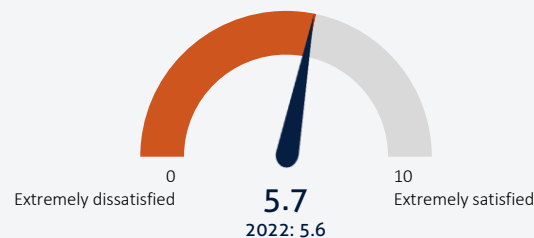
Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 0 through to a rating of 10.

Detailed results

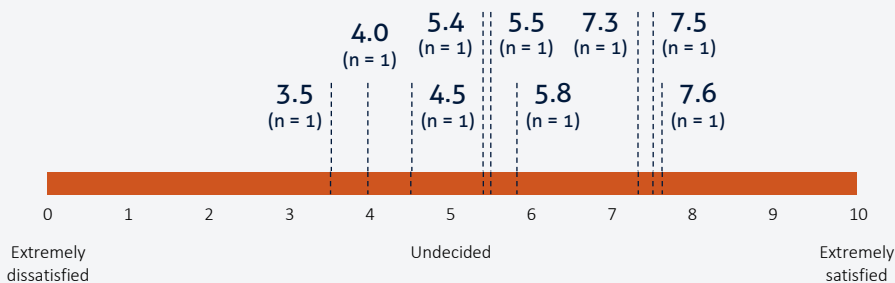
Performance indicators

Satisfaction with R&D levy investment

Q28. 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 = 9 (n = 31 responses)



Range of mean results across milling companies (n = 9)



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.

Millers' overall satisfaction rating was at 5.7, a small uplift from the 2022 result.

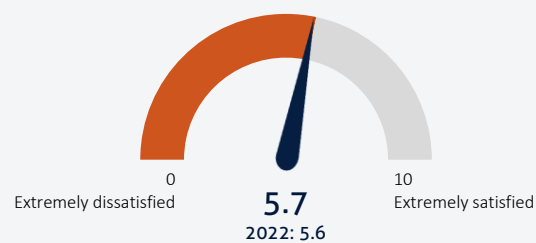
The rating provided across the 9 companies ranged from 3.5 through to 7.6 reflecting a clearly varied experience and satisfaction across companies.

The wide range of ratings creates some cause for concern with some effort required to identify efforts to close the gap in satisfaction.

Performance indicators

Satisfaction with R&D levy investment

Q28. 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 = 9 (n = 31 responses)



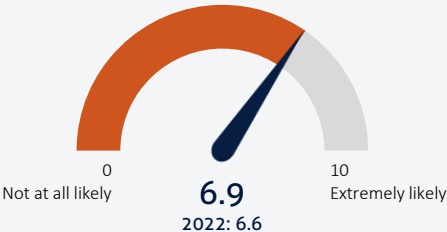
Key measures by milling company representatives rating satisfaction by 0-5 or 6-10:

	Rating Sat with Levy Investment 0-5 (n = 10)	Rating Sat with Levy Investment 6-10 (n = 21)
Satisfaction with R&D levy investment	3.0	7.1
Advocacy of the services, products and information SRA provide	5.9	7.8
Familiar with SRA's Strategic Plan 2021-2026	50%	67%
Satisfaction with SRA's Strategic Plan 2021-2026	3.0	6.9
Familiar with SRA's research investment planning	50%	67%
Satisfaction with SRA's research investment planning	2.2	6.7
Familiar with SRA's district plans	40%	81%
Satisfaction with SRA's district plans	4.3	7.2
Average ratings of measures:		
District Managers (4 measures)	3.6	7.2
Researchers (4 measures)	3.9	7.3
Products & Services (11 measures)	5.9	7.7
Plant Breeding Program (4 measures)	5.9	7.5
Satisfied with the quality of SRA communications for providing useful and credible information	5.5	7.5
% rating very active or active in their perception of SRA staff engaging in industry matters and events in the district(s) where their mill(s) operate	30%	76%
Satisfaction with SRA's engagement with their company about new sugarcane research and district issues and opportunities	3.6	6.6
% rating very easy or easy in how they find SRA to work with	20%	71%

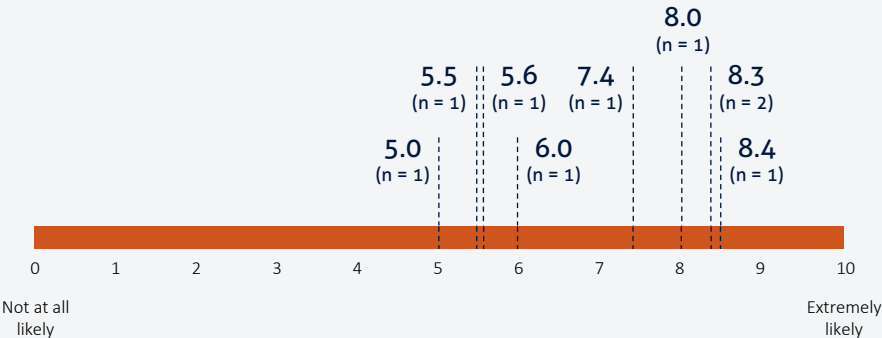
Performance indicators

Advocacy of SRA and Net Promoter Score

Q30. 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 = 9 (n = 31 responses)



Range of mean results across milling companies (n = 9)



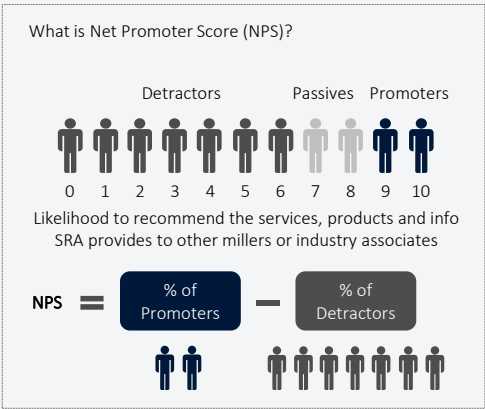
Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 3 through to a rating of 10.

Net Promoter Score
Base: All milling companies, n = 9 (n = 31 responses)



-21
2022: -28
on a scale of
-100 to +100

Net Promoter
Score



Promoters: 20%

2022:

21%



Passives: 39%

30%



Detractors: 41%

49%

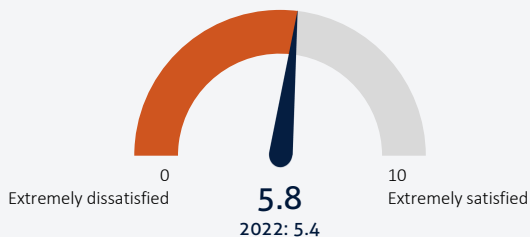


Appendices

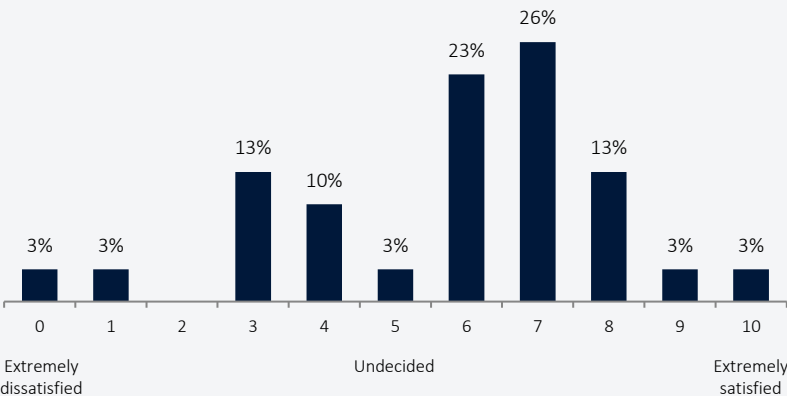
Appendices

Satisfaction with R&D levy investment and advocacy of SRA

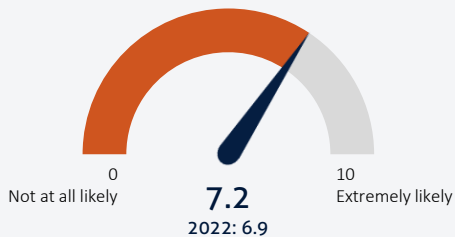
Q27. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?
(average results of all respondents regardless of milling company)
Base: All milling company respondents (excluding “Can’t say” answers), n = 31



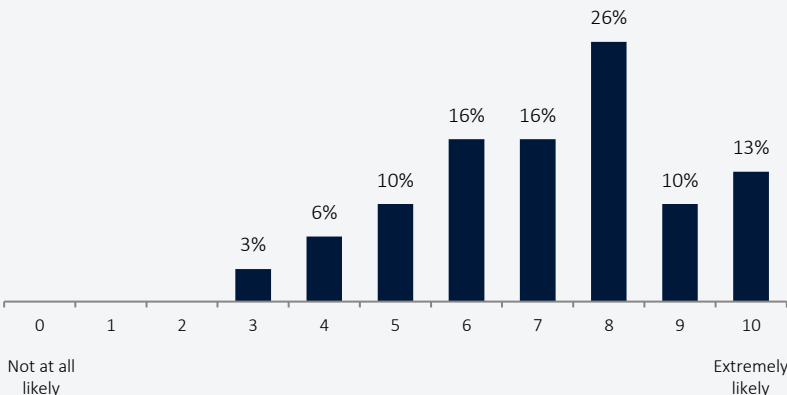
Distribution of ratings



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 (excluding “Can’t say” answers), n = 31



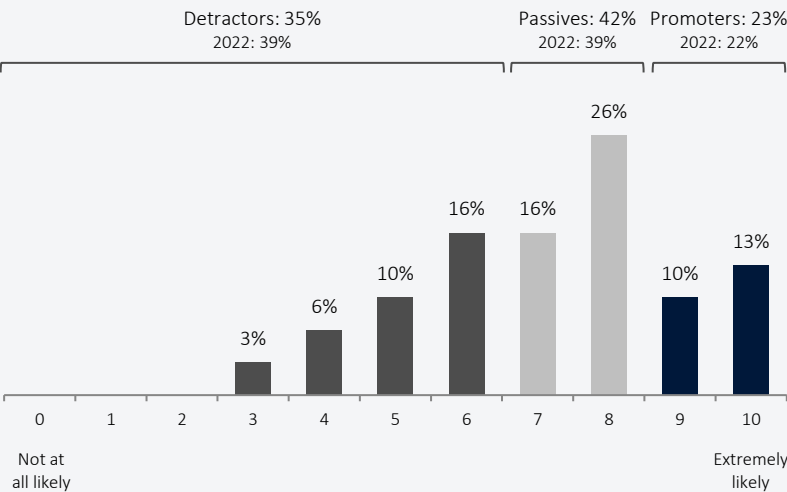
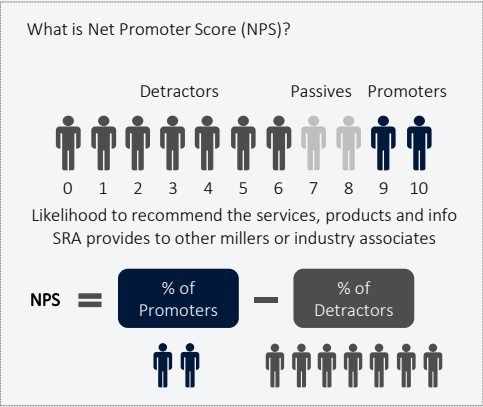
Distribution of ratings



Net Promoter Score
(average results of all respondents regardless of milling company)
Base: All milling company respondents, n = 31



Net Promoter
Score



Variability across respondents within milling companies

The below analysis represents the variability of results within milling companies across four key measures of satisfaction, with a similar analysis performed on the 2022 data for comparison. The below analysis only considers respondents who provided a rating between 0 and 10 and ignores those not asked the question or provided an answer of “Can’t say”.

Satisfaction with R&D levy investment

	2023				2022			
	# of surveys	Average rating	Range of ratings	Maximum variance	# of surveys	Average rating	Range of ratings	Maximum variance
Company 1	n = 2	7.5	6 - 9	3 points	n = 2	4.5	3 - 6	3 points
Company 2	n = 2	4.5	3 - 6	3 points	n = 1	6.0	6 - 6	0 points
Company 3	n = 4	7.3	7 - 8	1 point	n = 4	6.0	2 - 8	6 points
Company 4	n = 5	4.0	3 - 6	3 points	n = 3	7.0	6 - 9	3 points
Company 5	n = 5	7.6	6 - 10	4 points	n = 2	5.5	3 - 8	5 points
Company 6	N = 2	3.5	0 - 7	7 points	n = 1	6.0	6 - 6	0 points
Company 7	n = 2	5.5	5 - 6	1 point	n = 0	-	-	-
Company 8	n = 4	5.8	1 - 8	7 points	n = 3	5.7	3 - 7	4 points
Company 9	n = 5	5.4	3 - 8	5 points	n = 7	4.3	2 - 7	5 points

Satisfaction with SRA's Strategic Plan 2021-2026

	2023				2022			
	# of surveys	Average rating	Range of ratings	Maximum variance	# of surveys	Average rating	Range of ratings	Maximum variance
Company 1	n = 1	7.0	7 - 7	0 points	n = 2	5.0	5 - 5	0 points
Company 2	n = 1	7.0	7 - 7	0 points	n = 0	-	-	-
Company 3	n = 4	7.0	7 - 7	0 points	n = 3	6.7	5 - 8	3 points
Company 4	n = 1	5.0	5 - 5	0 points	n = 1	8.0	8 - 8	0 points
Company 5	n = 3	6.7	6 - 8	2 points	n = 2	6.5	5 - 8	3 points
Company 6	n = 2	3.0	0 - 6	6 points	n = 0	-	-	-
Company 7	n = 0	-	-	-	n = 0	-	-	-
Company 8	n = 4	6.0	2 - 8	6 points	n = 2	7.5	7 - 8	1 point
Company 9	n = 3	5.0	3 - 7	4 points	n = 6	6.5	4 - 8	4 points

Satisfaction with SRA's research investment planning

	2023				2022			
	# of surveys	Average rating	Range of ratings	Maximum variance	# of surveys	Average rating	Range of ratings	Maximum variance
Company 1	n = 1	8.0	8 - 8	0 points	n = 2	6.0	5 - 7	2 points
Company 2	n = 2	3.0	1 - 5	4 points	n = 0	-	-	-
Company 3	n = 4	6.5	6 - 7	1 point	n = 4	6.5	3 - 8	5 points
Company 4	n = 1	6.0	6 - 6	0 points	n = 1	7.0	7 - 7	0 points
Company 5	n = 3	7.3	6 - 9	3 points	n = 2	6.5	5 - 8	3 points
Company 6	n = 2	3.5	1 - 6	5 points	n = 1	6.0	6 - 6	0 points
Company 7	n = 0	-	-	-	n = 0	-	-	-
Company 8	n = 3	5.0	1 - 7	6 points	n = 2	7.5	7 - 8	1 point
Company 9	n = 3	5.0	3 - 7	4 points	n = 5	5.8	4 - 7	3 points

Satisfaction with SRA's district plans

	2023				2022			
	# of surveys	Average rating	Range of ratings	Maximum variance	# of surveys	Average rating	Range of ratings	Maximum variance
Company 1	n = 2	6.0	4 - 8	4 points	n = 2	3.0	1 - 5	4 points
Company 2	n = 2	5.0	5 - 5	0 points	n = 0	-	-	-
Company 3	n = 3	7.7	7 - 8	1 point	n = 3	6.3	5 - 8	3 points
Company 4	n = 2	8.0	7 - 9	2 points	n = 1	7.0	7 - 7	0 points
Company 5	n = 4	7.0	5 - 8	3 points	n = 2	6.5	5 - 8	3 points
Company 6	n = 1	0.0	0 - 0	0 points	n = 0	-	-	-
Company 7	n = 1	7.0	7 - 7	0 points	n = 0	-	-	-
Company 8	n = 4	6.5	3 - 9	6 points	n = 3	8.0	7 - 9	2 points
Company 9	n = 2	8.5	8 - 9	1 point	n = 3	5.3	4 - 7	3 points

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 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 nine 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 30 minute online or phone survey was conducted with respondents. This survey measured, amongst other things:

- Miller sentiment
- Organisational reputation
- Perceptions of district engagement
- Perception of SRA partnership
- Perceptions about SRA products and services
- Perceptions around plant breeding programs and new varieties
- Perceptions about research portfolio
- 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 = 31 representatives across the nine milling companies responded and completed the survey. A breakdown of the total number of completes by milling company is provided below.

Overall	By Milling Company								
Total completes	Bundaberg Sugar	Far Northern Milling	Isis	Mackay Sugar	MSF Sugar	Rocky Point (Heck Group)	Sunshine Sugar	Tully Sugar	Wilmar Sugar
31	2	2	4	5	5	2	2	4	5

Weighting As noted above, more than one representative from each of the nine 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 = 31 people who responded to the survey, the report will indicate a sample size of 9 milling companies.

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



For further information,
please contact:



Ben Simpson
Principal Monitoring and Evaluation Officer
E: BSimpson@sugarresearch.com.au



Michael Sparks
Director
E: msparks@intuitivesolutions.com.au