



# 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:

- o Growers; and
- o 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 9<sup>th</sup> May 2023 and 26<sup>th</sup> May 2023.

# The report provides company-level results

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## 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 than provides coverage of feedback from all nine of the milling companies.

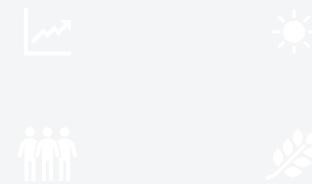
To ensure the results were balanced and not overweighted to those companies where there was a higher number of respondents, it was agreed with SRA than an 'company' average would be estimated for those milling companies where more than one respondent provided feedback. This methodology was also utilised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



Researchers\*



Products &  
Services\*



Plant  
Breeding  
Program\*



Quality of  
Comms

5.4

6.0

6.9

6.9

6.7



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.



### SRA's Strategic Plan 2021-2026

% Familiar  
60%

5.8  
Satisfaction out of 10

% Heard of but don't know details: 34%

### SRA's research investment planning

% Familiar  
63%

5.5  
Satisfaction out of 10

% Heard of but don't know details: 25%

% Wasn't aware: 12%

## 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:

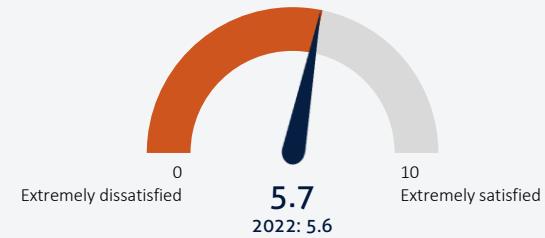
- n = 6 miller representatives (19%, up 6% on 2022) rated their satisfaction strongly (at 8, 9 or 10);
- n = 15 miller representatives (49%, down 3%) provided a modest rating (6 or 7); while
- n = 10 miller representatives (32%, down 3%) rated between 0 to 5.

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



## 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.

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

	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

# 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.

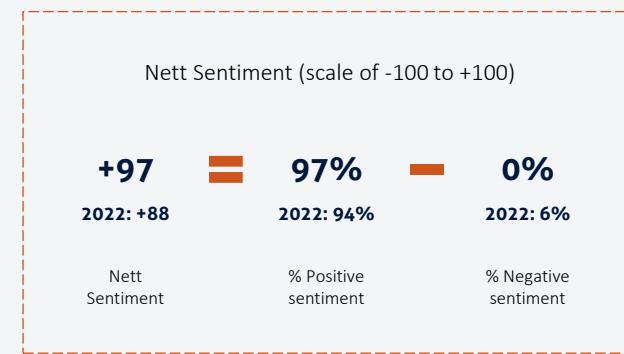
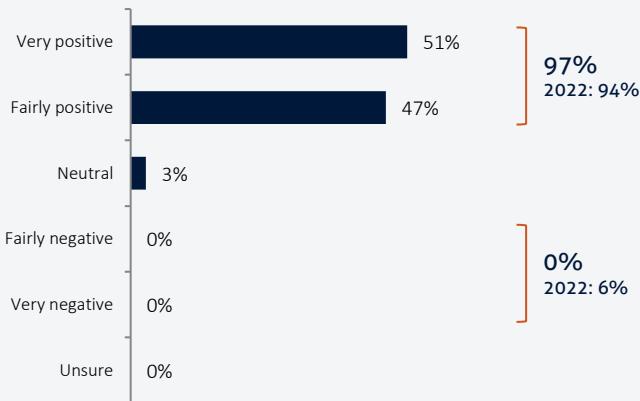


Detailed results

## Miller sentiment

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

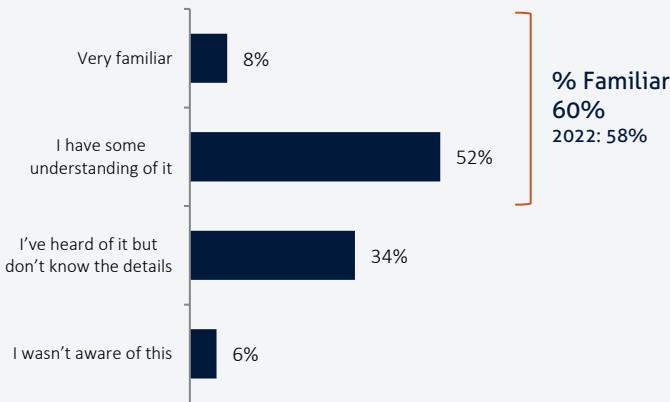
## Connection to organisational goals

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)

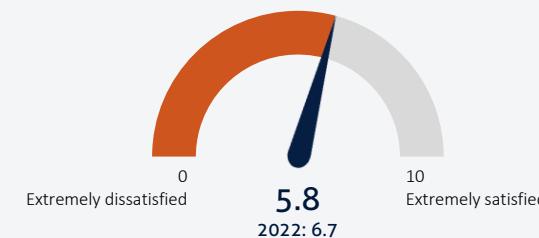
**SRA's Strategic Plan 2021-2026 including the outcomes, research missions and service delivery model**



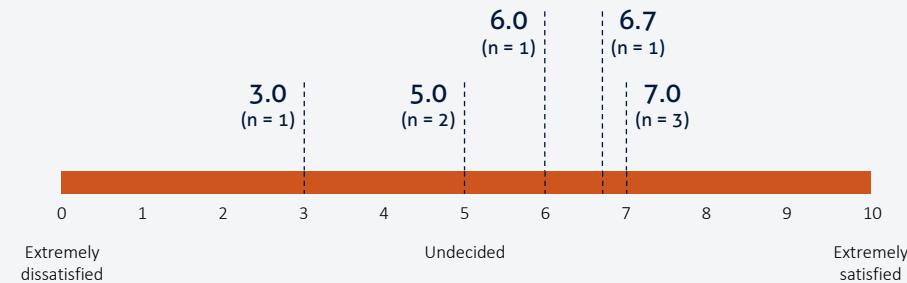
Q3. And, overall, how satisfied are you that these address the needs of your company and district(s) where your mill(s) operate(s)?

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)

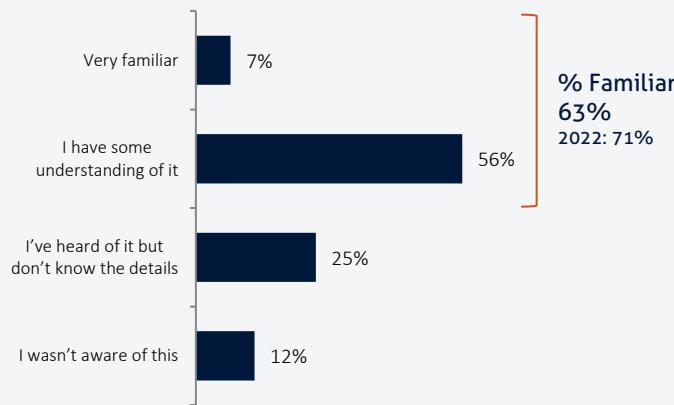


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Base: All milling companies, n = 9 (n = 31 responses)

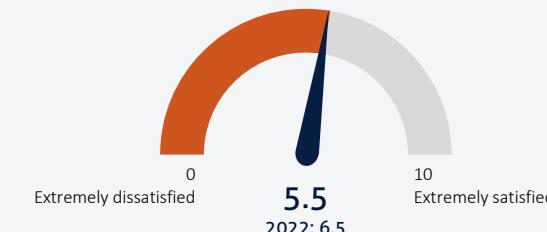
SRA's research investment planning



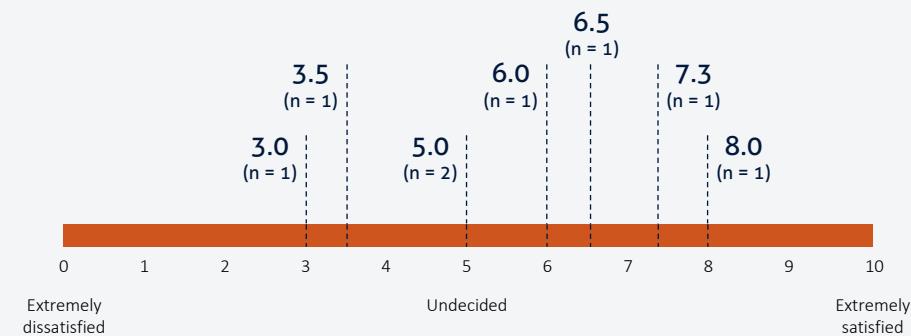
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Base: All milling companies who are at least somewhat familiar with SRA's efforts (excluding "Can't say" answers), n varies

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



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



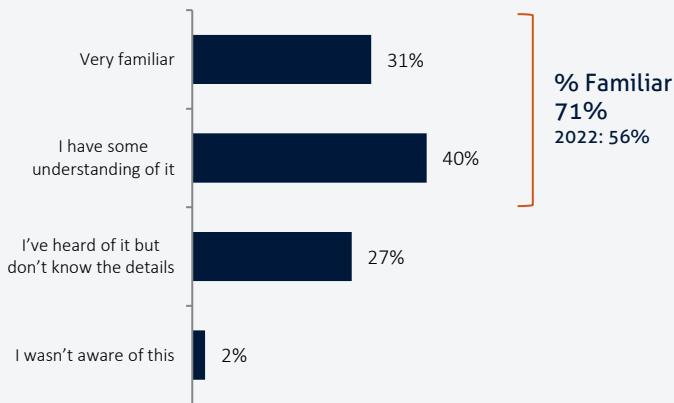
Detailed results

## Perceptions of district engagement

# Familiarity and satisfaction with SRA's district plans

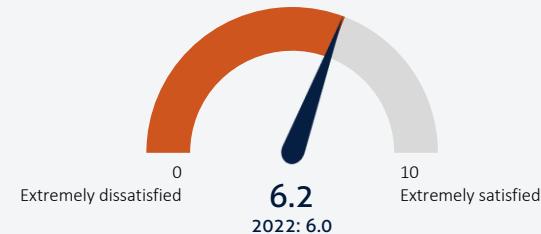
Q2. How familiar would you say you are of...  
 Base: All milling companies, n = 9 (n = 31 responses)

## SRA's district plans to target productivity improvements

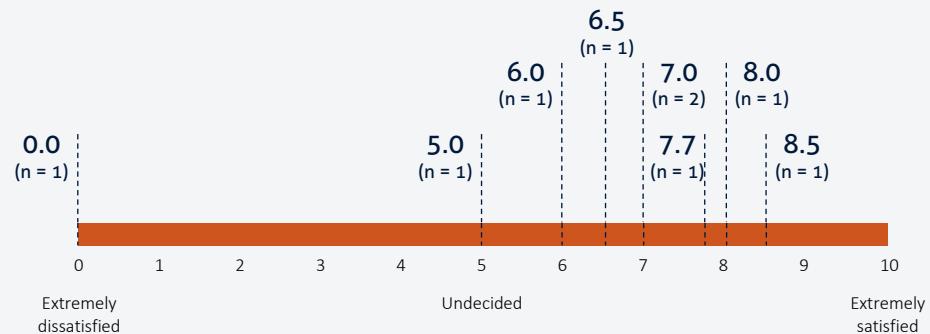


Q3. And, overall, how satisfied are you that these address the needs of your company and district(s) where your mill(s) operate(s)?  
 Base: All milling companies who are at least somewhat familiar with SRA's efforts (excluding "Can't say" answers), n varies

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



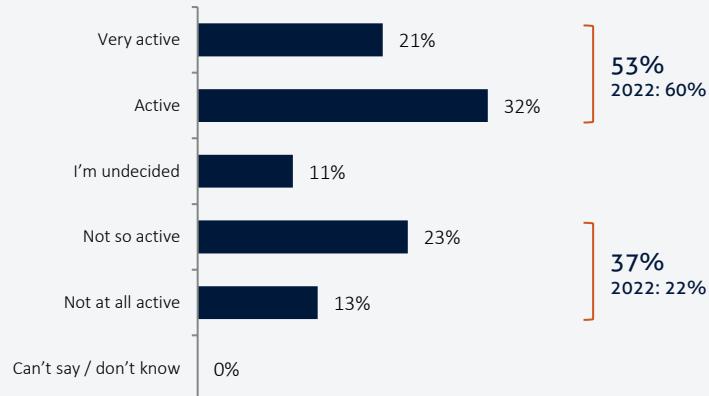
Range of mean results across milling companies (n = 9)



# Perception of SRA staff engagement in industry matter / events

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.

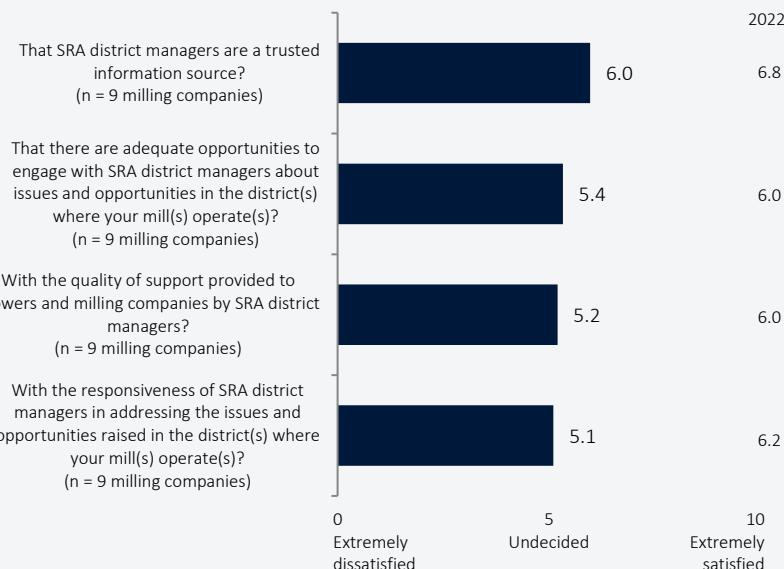
An increased proportion offered a different, more critical perspective.

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.

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 don't response there are reasons to the experience involving issues from management and district managers didn't consider. There is no recognition of the growing industry. lack of support generally across mills."

"I have limited visibility for SRA's district managers. They have never been the district managers and don't understand the area. From what I understand they are generalists in growing interests in the milling side. They are generalists, because they don't know what they are doing. They have no intention to be involved with the industry but they do nothing."

"I have not seen a district manager for the last 8 years in my current position. Just because I am not sure if they are still there or not. There's not even one there. The district managers they are very ineffective. They are not managers. Don't know them. I have not had any interaction from them."

"I am right away knowing managers, have never met them and they are not engaged with growers. Management is not engaged with them. They have no contact, no relying on them. They are not engaged with them. They are not engaged with them. They are not engaged with them. Again, I could not interact with them. My understanding is that the district manager is there is no interaction from the management side. They are - responsible for the milling industry - nothing to do with the milling industry."

"Only genuine there were a lack of contact and engagement struggled with any evidence of support. Having management of strong there was a lack of information available to assist growing industry."

"The SRA district managers are not engaged at all. They failed to interact with them. It's no interaction is better than no interaction. From growers perspective there is some interaction and however, it's not the growers meeting of their own and perspective very little impact and they do not communicate with them. Shouldn't know because don't have any interaction with them."

"I think management district managers engage with growers. I think they are not engaged with growers. I think they are not engaged with growers. I think they are not engaged with growers. There is a complete disconnect with the growing industry."

# Perceptions of district engagement

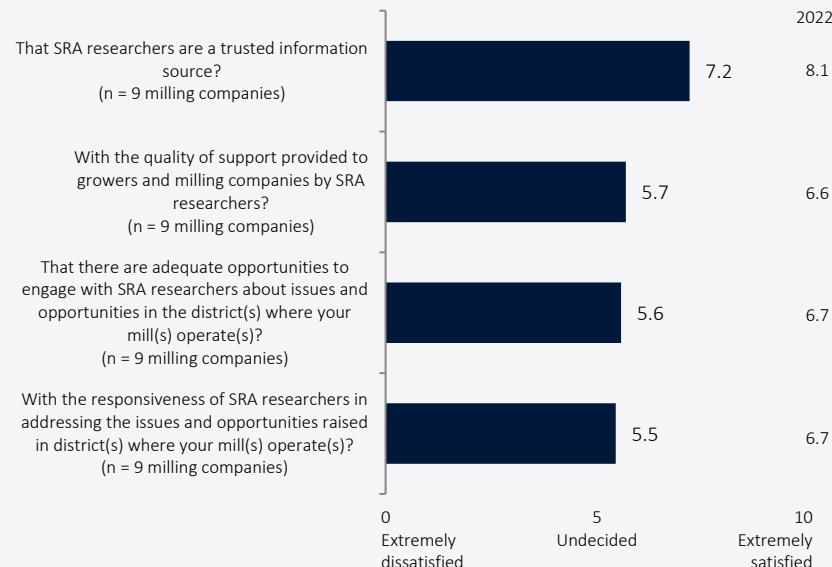
## Experience with SRA's researchers

Page 20

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)

"Open their earings from researchers, very responsive to SRA, keep up with the mill. However there the majority of things, I don't think I've had the growing better. There has been a loss in quality in the growing, but I can very easily blame the milling cause."

"Those milling people don't have anything to do with them & their business is more green related. If the communication is less responsive from the milling, researchers don't get any support from the growing sector there is no reason for them to shout their responses. They are doing their best but I don't think they are doing well."

"It's less productive, less opportunities, I know that they create, or where we have to go to another place, they aren't actively employing them. 10-20% less by 2020 than 2010."

"My understanding is that there are 10 researchers involved with milling, that's not because that's the research they've got for the agricultural products, but they're not account for the impact on milling. I don't believe they're aware of the opportunities for research & development within the milling sector. For a research organization to be dealing with the milling sector they are only dealing with the commercial side of things for what they're probably their research work. The interaction that they have with the researchers, because of the continuous development, they are paid for research is a continuous opportunity for development that maybe doesn't happen."

"The researchers have not really done much research on anything else other than the sugar cane, so the manager hasn't seen anything else other than sugar cane, so the manager hasn't been using information from different districts where there is a difference. The milling sector is very old & nothing goes on in comparison to the sugar cane, so there is not a lot of information given to researchers, what's a good way to have to take out the information, the answer that is being given is that information is not being recorded or utilized, I think."

"There are some researchers that have the presence of SRA in our area and would like a more balanced approach of services. They are not present enough in the area. If they are not here, they do not know what is relevant for our area. I have noticed a difference between support provided to larger companies, than smaller ones."

"They are involved in knowledge but more where the money directed, will develop money to R&D, where it would be important. The way processes & solution - it can go all through the development process and not just the entry requirements, especially in relation to R&D work, needs to be addressed earlier in the process."

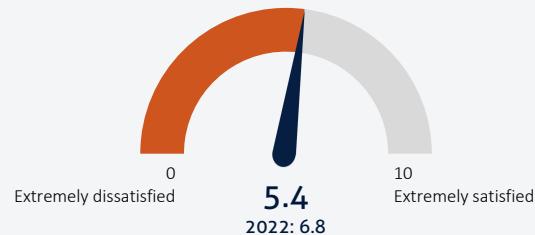
Detailed results

## Perceptions of SRA partnership

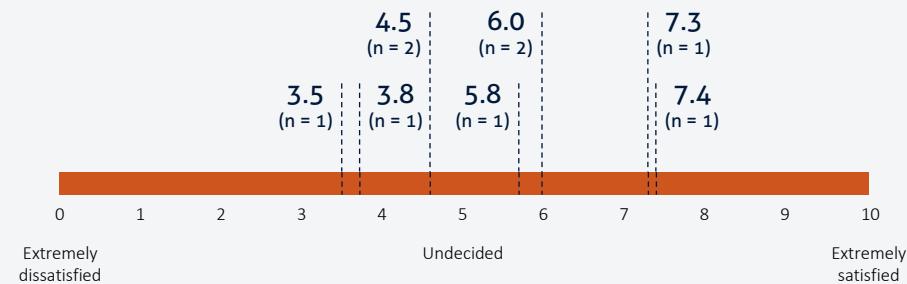
# Satisfaction with SRA's engagement

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)



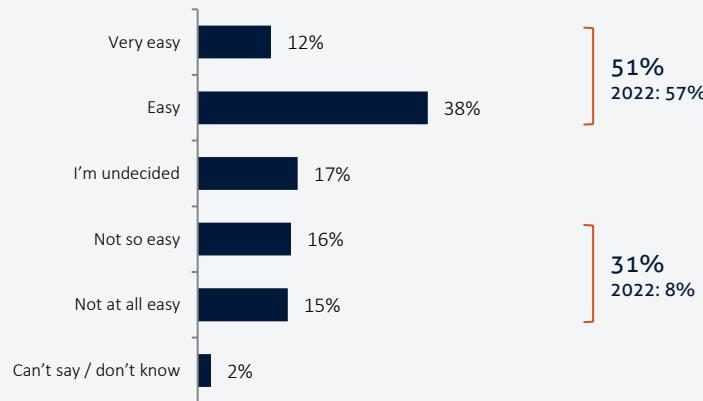
Range of mean results across milling companies (n = 9)



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.

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

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



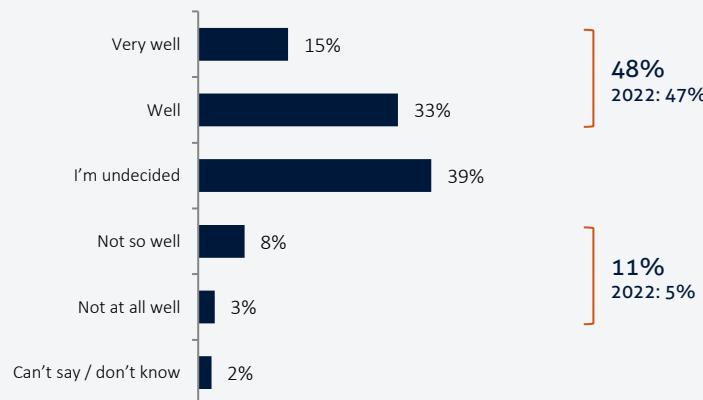
Generally, milling companies indicated that SRA was easy to work with. However, there are more companies this year indicating an opposing view.

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

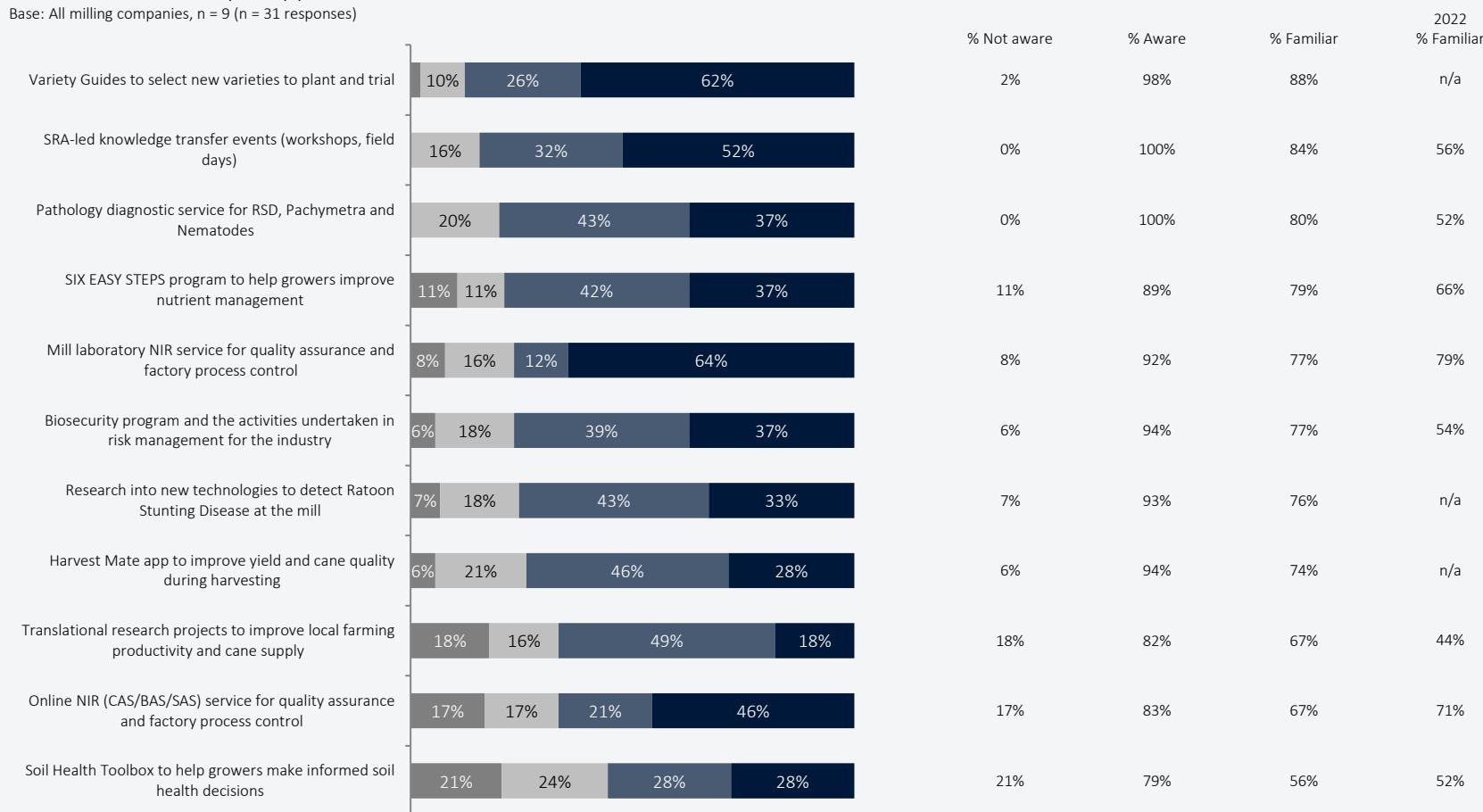
## Perception about SRA products and services

# 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...

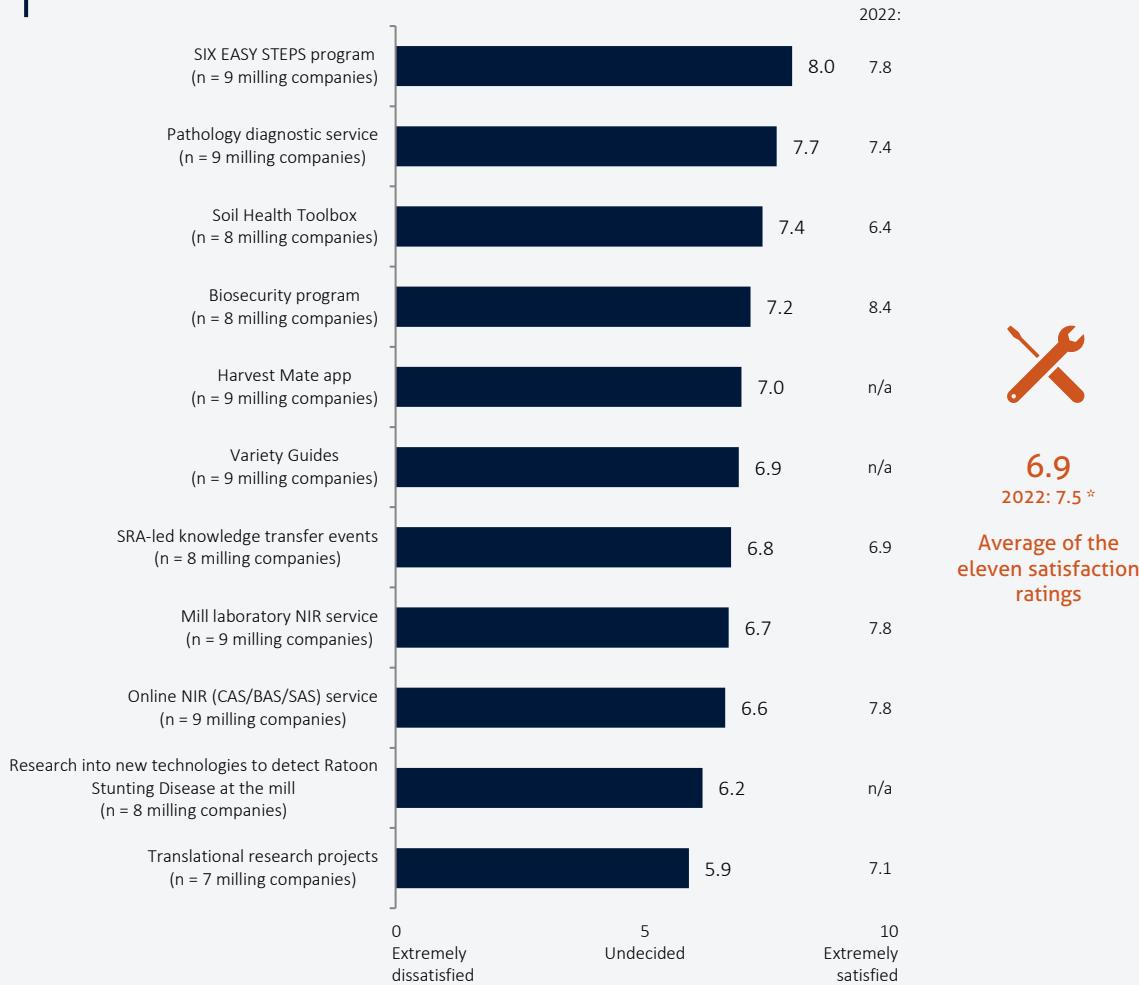
Base: All milling companies, n = 9 (n = 31 responses)



■ I wasn't aware of this ■ I've heard of it but don't know the details ■ I have some understanding of it ■ Very familiar

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, I think it's important to be an independent actor but this, again, illustrates, an anything or everything sense of what we need to be doing. Don't know exactly if any messaging point we need to be doing something in supported sense, that's purchased those objectives. I think with the beginning of our in-homogeneous project, there will be individual government addressed issues, some that are more technical and safety, no issues,

“We have only just begun to see the value Google makes of the research as much as the research makes of Google.”<sup>1</sup>

"They don't do a lot of work, but they are classified as local aggregators of consumers. So, they have a limited expertise in business and consumers not located elsewhere are therefore limited. I think it's a failing for that area. That 204 area [Duluth and St. Louis Park, MN] is another area they seem to ignore [sic]. It's a massive growing area very limited for the consumer."

"Because previous trials of treatments of stroke that resulted in no benefit involved much longer hospitalizations, this is a surprise."

"Bureaucracy - lack of innovation and accountability to what is the requirement that is to be. Transformational focus of innovation, shift from reactive to proactive. Policy as a ground they should focus more."

“Never take the floor except when you

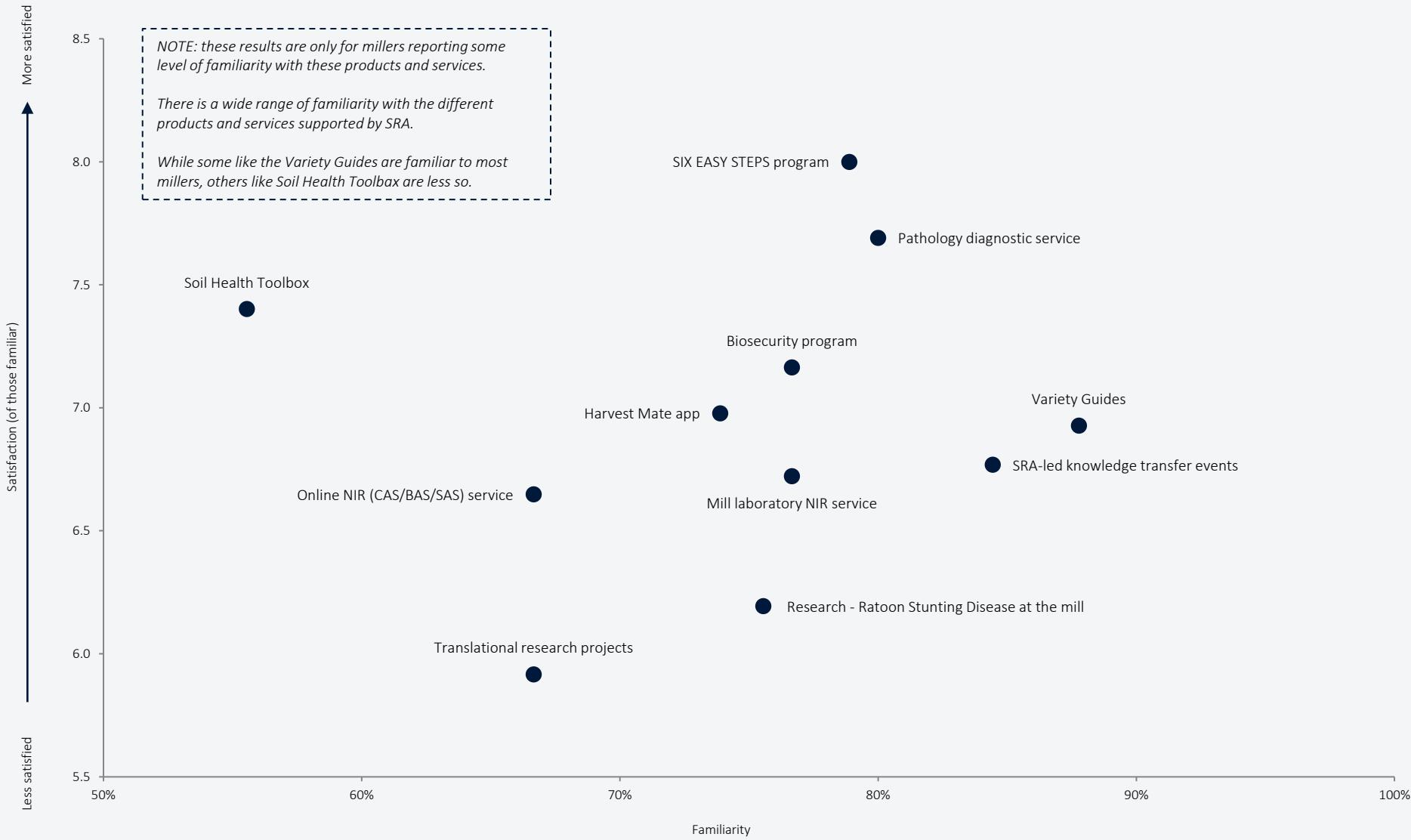
"I don't know what makes me do it."

“*Statistical software packages (including commercial software) often do not have the necessary features to support the analysis of the data collected in the field. These features are often not available in the software used for the analysis of the data collected in the field. The software used for the analysis of the data collected in the field is often not available in the software used for the analysis of the data collected in the field.*”

1932 - Harvard Institute with their controversial H-1932. Harvard - Harvard claimed the training was home, but had a uniform that didn't have an identification number. Eventually - it became apparent that many diagnostic instruments had been, in many instances, mislabeled and for our unit, vehicles needed to have the identification and more difficult to process. Transportation vehicles, they are stated, a lack of organization. Vehicles given - information regarding this is not there on the one project from what is presented.

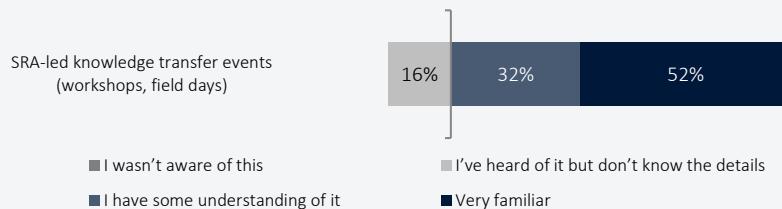
\* In 2022, satisfaction was asked across twelve products and services (2023: 11).

# Comparison of familiarity and satisfaction

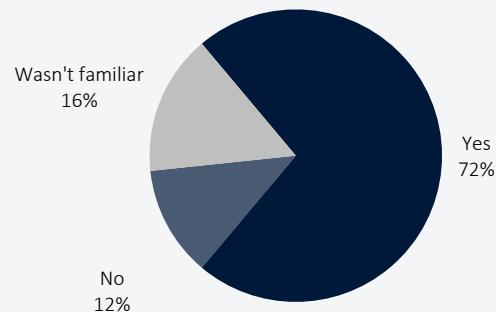


## Attending SRA-led knowledge transfer events

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)



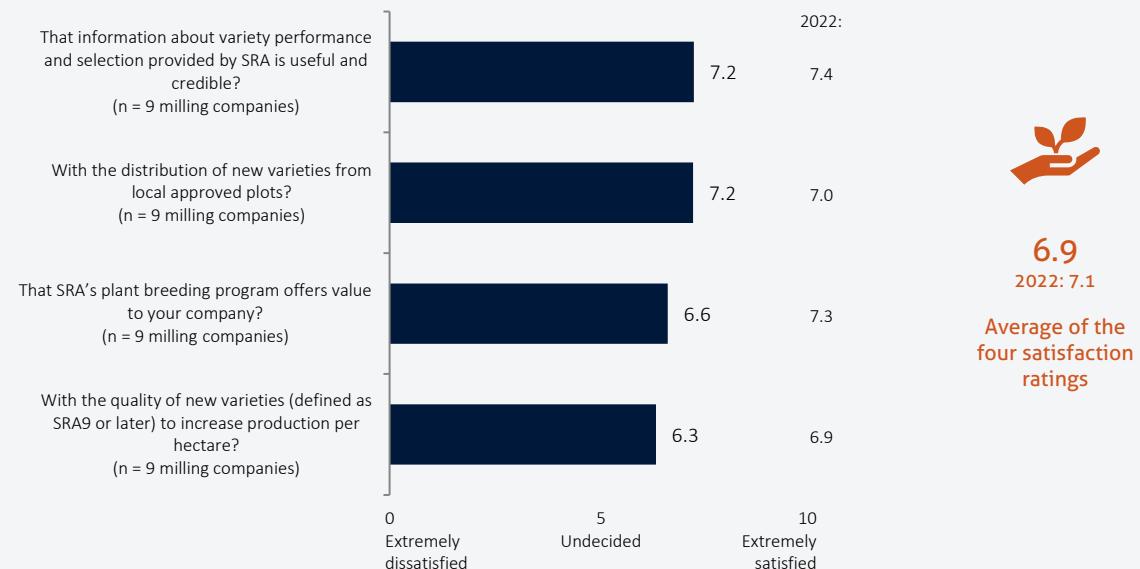
Detailed results

## Perceptions about plant breeding program and new varieties

# 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



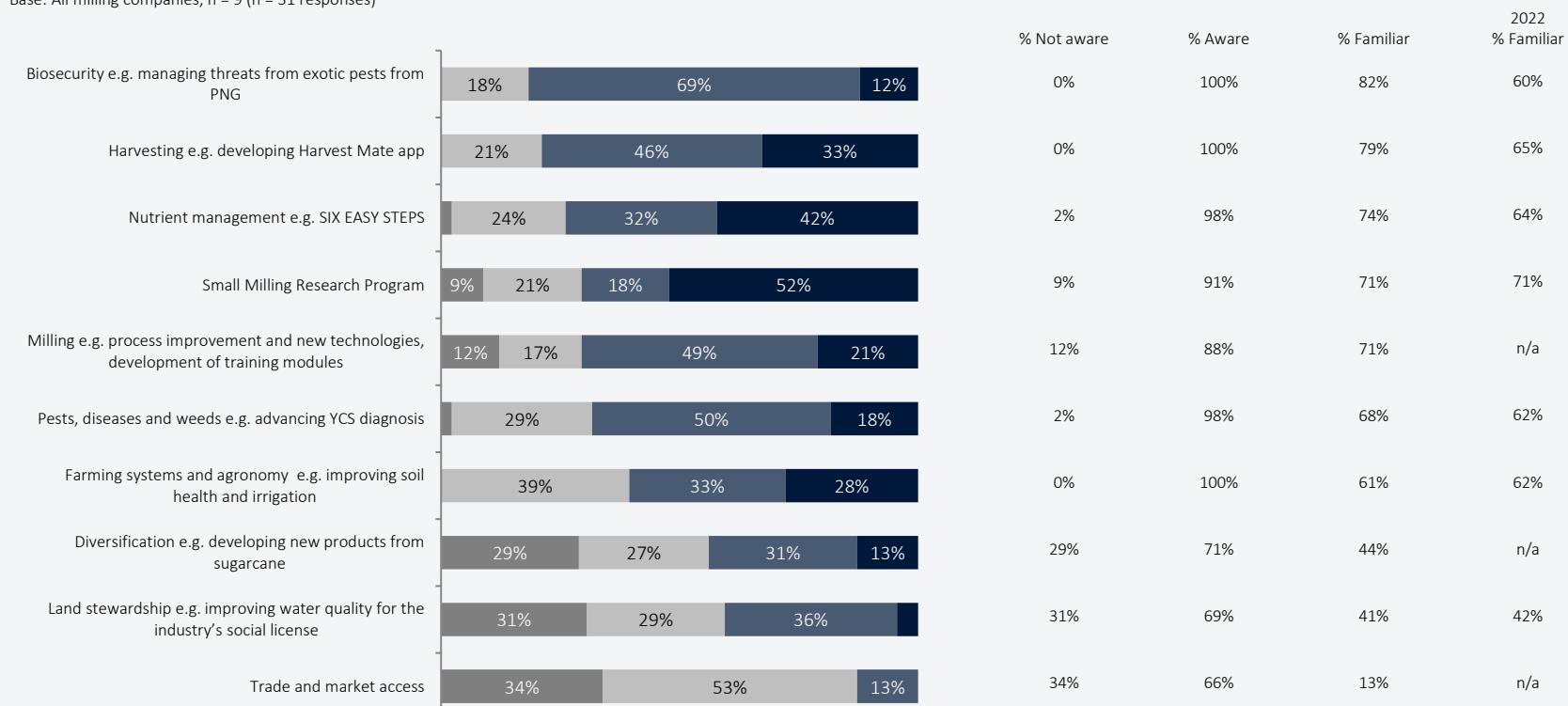
Detailed results

## Perceptions about research portfolio

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)

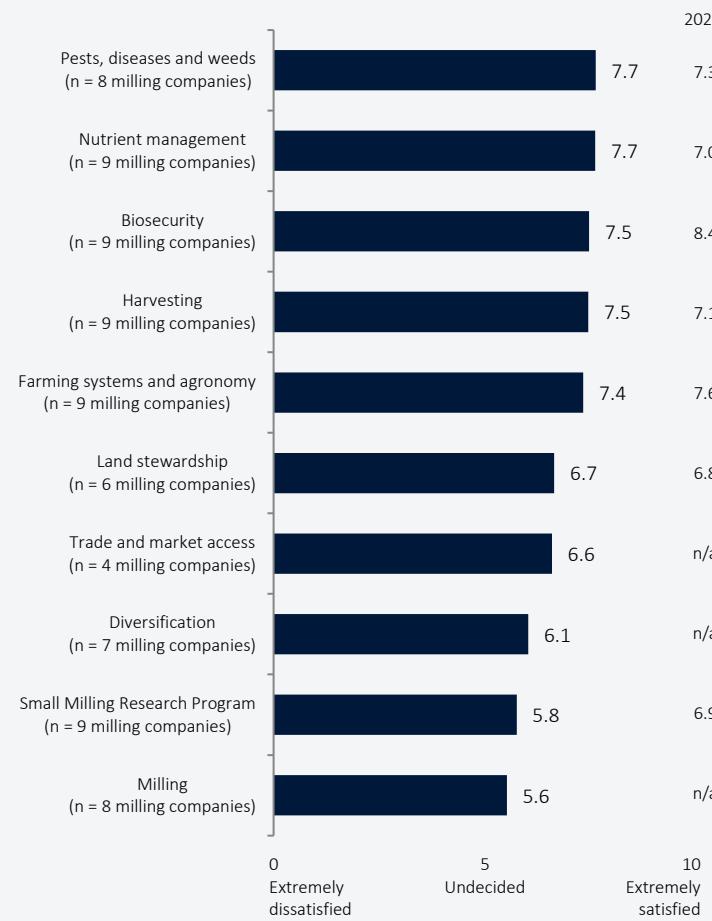


■ I wasn't aware of this ■ I've heard of it but don't know the details ■ I have some understanding of it ■ Very familiar

# Satisfaction with SRA's areas of research investment

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)

"Question whether they perceive the research programme as being more focussing on the milling industry. Answered 'Dissatisfied' stated that programme is not meeting industry generally. There is some good research occurring in the year, but it is not happening in a manner that is useful to industry, being 'hit and miss', due to the lack of a clear strategic framework for programmes rather than the general research being 'a dumping ground'."

"Typical milling - the research is too generic, too much research is being done when projects have been submitted. These projects are designed to be individualised and based on the individual's needs rather than having that investment and subsequently having a wider industry-based research outcomes. There is a focus to result in generic outcomes."

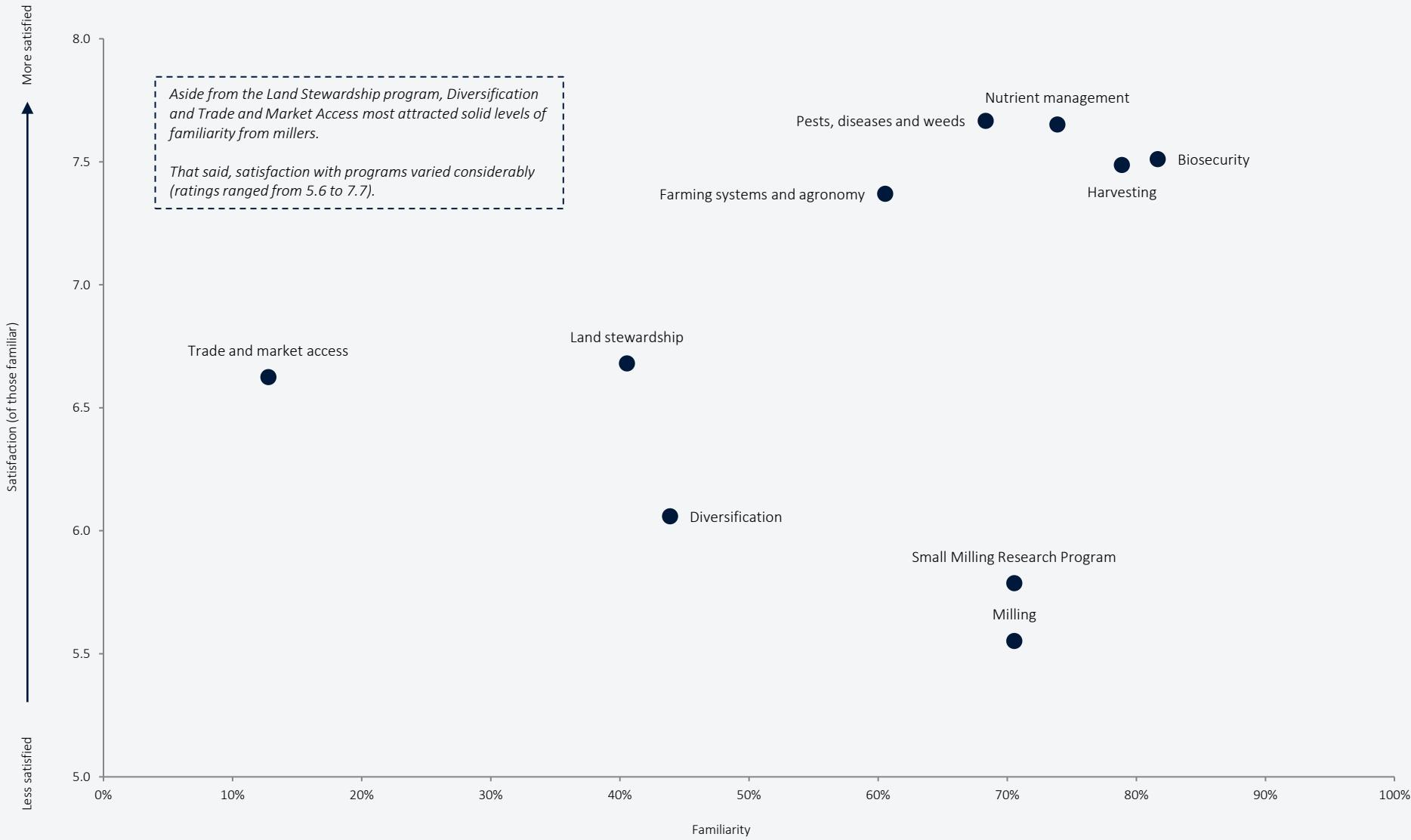
"The key research areas involved with research for milling & processing are inadequately funded, while other areas of research (e.g. sugar cane, biofuels) are being given a higher priority at the expense of maintaining strong & healthy local communities through milling & processing. The milling research community has been a significant drain on resources, impacting their ability to have a positive impact on the industry, impacting a positive opinion. The industry generating research is being influenced by larger milling organisations and opportunities for smaller companies to access research are becoming less frequent and less successful. The evidence application of research for smaller companies is unattractive for smaller organisations."

"The lack of funding for program is very likely what drives research areas to migrate to milling (usually growing sector research), rather than for sugar cane which is mentioned. Anytime the programme has through, restricted budget, will provide the smaller but important opportunities to research & industry to have a positive impact in the long-term future. These smaller projects that play in market manipulation, there is no differentiation between the different companies that are involved in the industry. There is more of a market manipulation the different companies offering & market share."

"Funding - probably we have spent a lot of money over the last 10 years on sugar cane investment, however, don't think we have contributed immensely to our industry. Small milling - don't see we've generated anything positive but a few minor areas have investment."

"Milling - don't think there is high enough understanding of the position required for industry & what we do. Industry - funding - regulation is being used dysfunctional, wouldn't have information management and R&D opportunities, better communication programme going on previously, stronger local representations are too high of the funding."

# Comparison of familiarity and satisfaction



# 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)

"Improving efficiency and reduction of operating costs - management system purpose, we compete against other oil mill world companies and emerging economies, we need to invest more in becoming more productive with the supplies to us & the milling facilities for them, because less oil means less. Process efficiency - need to optimise in operational terms of the green economy."

"Developing to make greater return from the whole plant - sustainable solution and better integration of the mill with the rest of the business. Investment in future - investing the most value out of the same plant."

"Address harvesting issues through improving harvesting technology, managing the losses from low stem, stalk, chaff, trash or crop residues, must manage oil generation made out of these, then improved varieties - e.g. could work with different technologies and then monitor that for more efficient improvements."

"Area of research that more research that will assist companies to make savings for varieties that produce some yield/better use of resources used."

"Improving quality management and/or what is happening overseas of the world out in the new technologies developed & used in there and abroad."

"Weather stuff, rainfall stuff for weather patterns, we are looking for the next step change, we have refined things enough, what is going to take us forward? The next 10 years."

"Can grow oil for mill benefits, decreasing oil for sustainability. Yield - tonnes per ha."

"Oil products - greater diversity, stronger - who knows you wouldn't be interested which would bring greater value/industry."

"Investigation, research and the sugar cane plant, as sugar cane becomes competing for water and is known for a long time in terms of diversification with the focus on water management and in a long-term basis innovation to develop more clear understanding of what is happening that year, but probably different weather and sugar cane plant. From a research perspective there is a lot that needs to happen for research to happen, maybe the problem is the people that are managing research, maybe it is the research facilities, the facilities that are managing research, so that is the commercial outcome or reality."

"Harvesting - need to refine, the oil programme potential be of much greater benefit if the outcomes were developed - need to educate fundamental people to develop them and then plan to implement the knowledge because it is leading to overemployment."

"High yielding cane varieties, anything that could generate cane growing in the field. Any other improvements in research from cane that are available, something that is away from sugar beet, Committee for transport, technology, innovation that would support that change."

"In the area of production - volume of cane and decreasing inputs such as labour, equipment and energy/operations. There is a lot of changing/different plant environments out there resulting that - 'Milling efficiency - Productivity based environment milling'."

"Improvement in general on the productivity of the milling process."

"Area of the process that is used from the milling perspective. The growing issue from disease such as EPOV, high oil, better product, getting more oil out. Higher oil content - energy - oil with less oil content, harvesting the cane differently? because can't do it."

"Managing cane variability, not so much variety but more of the applied side of how we are improving industry."

"New technologies and innovation in the milling sector, and in the milling process area."

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

"Improving oil varieties, oil management, waste management, nutrient management, harvesting efficiency."

"Plant breeding & yields just because factors (cane & sugar)?"

"Improving improvements, improvements in harvesting technology and the changing face of the labour market, how to operate with less people but with improved processes, a more basic labour permanent, 1000 workers and how to achieve that."

"One working on optimisation of the mill, improving efficiency. New productivity-higher sugar factor & high sugar content."

"There is adequate funding supplied for the industry SRA needs to manage in the manner in which they operate, manufacturing needs to be distributed across milling units to allow gains in productivity and efficiency in order to increase the efficiency of the milling companies. Research in this area needs to be explored and implemented in association with the sugar house, retail and sustainable use of biomass for generating power, power generation, energy management, improvement of better oilseed streams (e.g. jute and cottonseed) and the benefits that the industry could offer as well as improvements, measuring the sugar/sugar content/cane/industry/sugar industry/sugar mill/sugar miller/sugar miller."

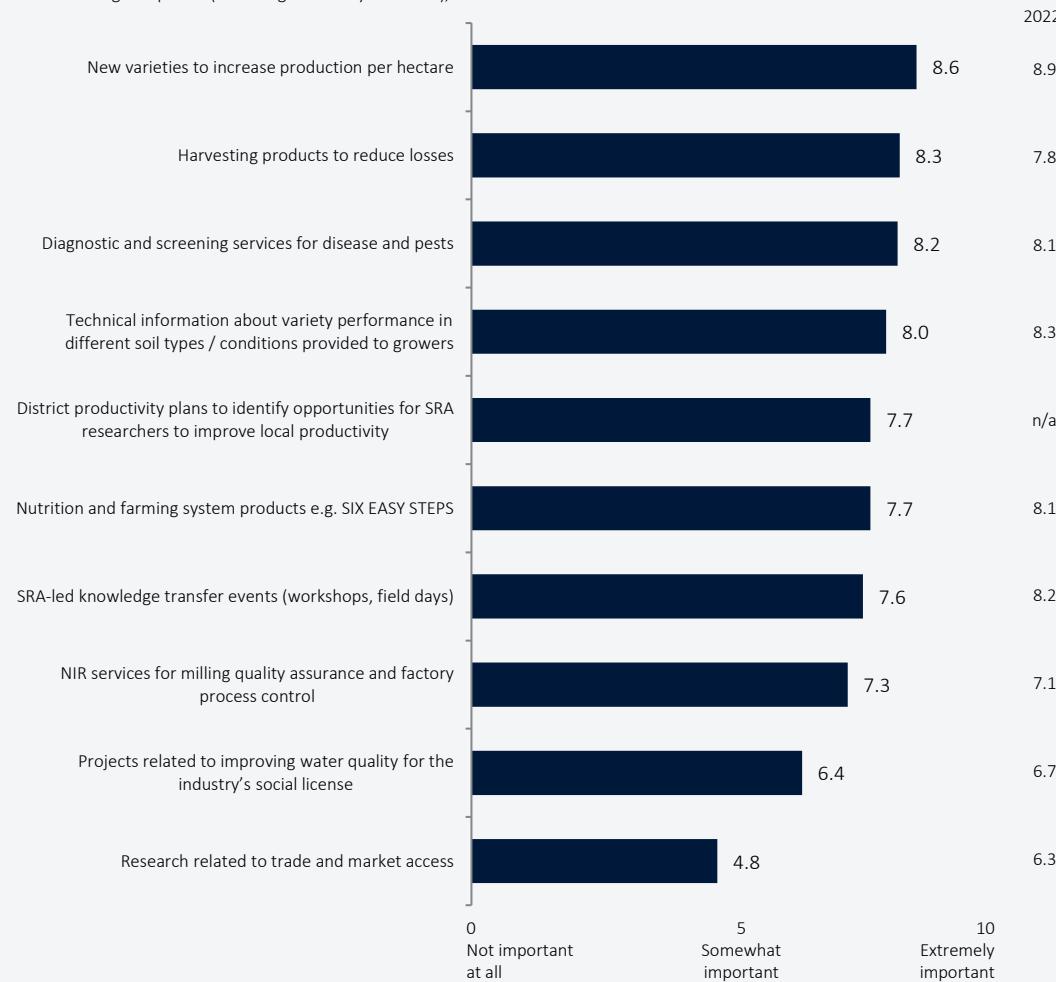
"Variety selection - bringing fast track variety selection & then looking another production system sugar cane that we are bringing to the mill, it is a different production system or what in terms of the environment or change etc."

"Area of variety where our yields are strong at a good price, where we are a market or position where we are not that, where some intercompetitors and other production taking and so that the industry could be commercially competitive from an environmental perspective. Management of the environment for sugar resources & mill."

# Importance of areas in increasing production and profitability

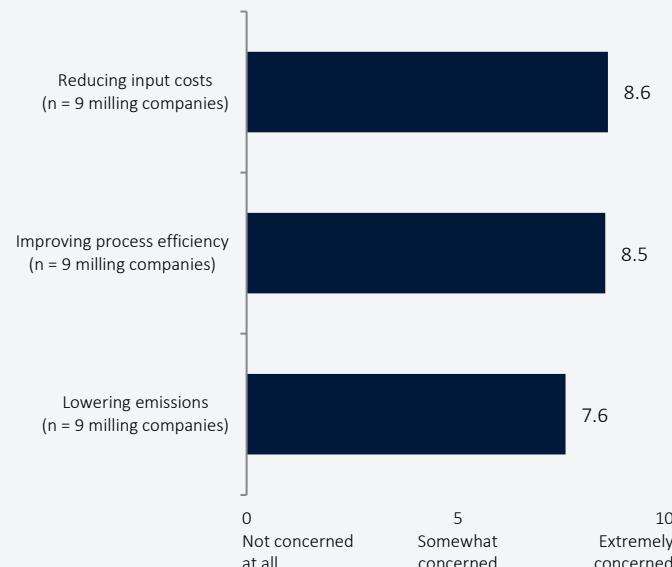
Q22. How important do you think the following areas of research and development are in increasing production throughput and profitability for milling companies?

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



# 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)

- "Reducing raw material input costs."
- "All the areas are concern. Industrial areas is enough diverse across milling areas in terms of research requirement."
- "The more focused concern areas = variety development & market development, field days & closer interaction with staff."
- "Commodity: Total lower performance & isolation through regulation will as increased concern of sugar issues through them. The mill has dual source of raw supply & good quality & reliable raw supply, 100% needs for regional industrial supply."
- "Carbon sequestration through biochar farming position, getting these back down, some work needs to be done - addressing some of the negative aspects for our products, co-products development, using energy reflecting the carbon content of the feedstock. Research chemicals could be another interesting area for higher value products from sugar. Some opportunities with carbon dioxide use."
- "Diversification of markets or products for sugar and, what additional commercial needs."
- "Development of improved harvesting design to reduce inefficiencies - work with the manufacturers to refine this."
- "Biochar and, alternative sugar sources from sugar."
- "Biochar products (different treatment by-products)"
- "Innovation. This and the industry has been struggling with for a long time, there is no effective innovation strategy. At the moment it's a company-level project, the connection between research and implementation fragmented."
- "Harvesting - it is a big problem for the sugar region, particularly harvesting & storage. Research strategies, development to influence CO2 emissions in the sugar industry."
- "Harvesting and processing, it is one of the biggest issues in the sugar, particularly harvesting & storage. Mills, industry providers didn't think the importance of harvesting in R&D. Priority for harvesting is good operator knowledge & training, and through training knowledge, the confidence, the depth of knowledge has gone."
- "Harvesting is one problem, don't believe the farmers have understanding what harvesting strategy is given."
- "Innovation - learning - bringing innovations from other sugar-producing countries, such as Brazil. Brazil - strong knowledge, information exchange and spread the Australian industry."
- "Innovation increasing activities - new products, new technologies, which can bring the business."

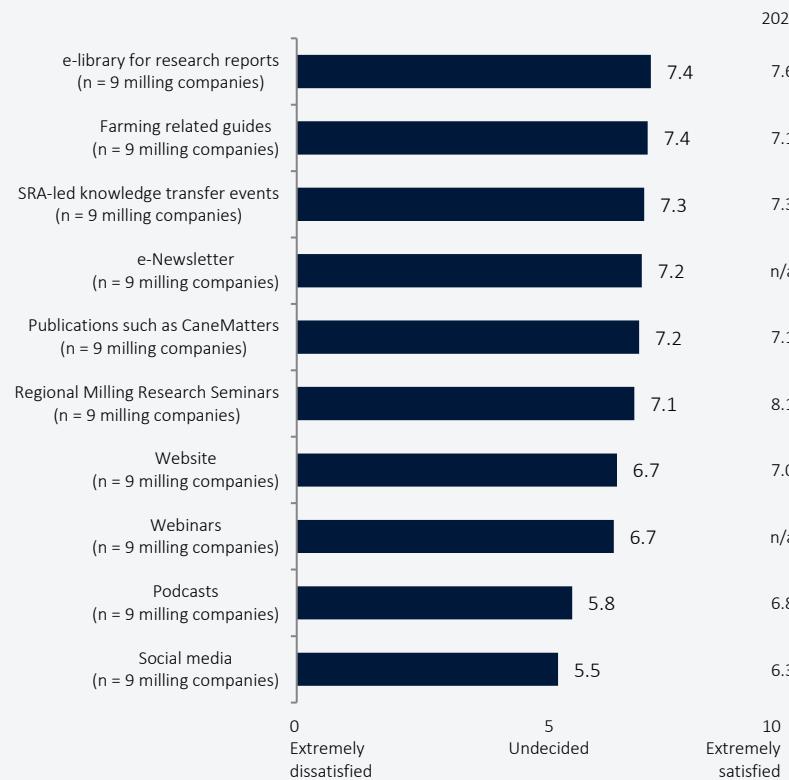
Detailed results

## Communication needs and experiences

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?

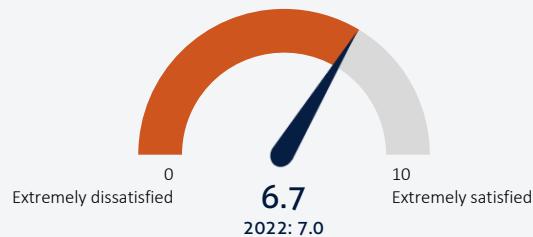
Base: All milling companies (excluding "Can't say" answers), n varies



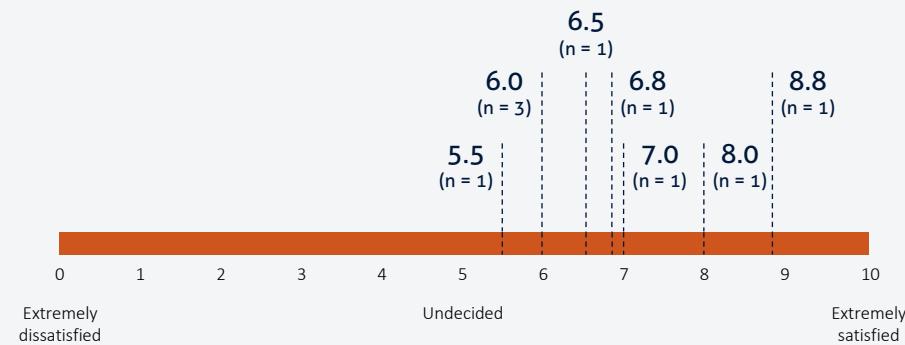
# Satisfaction with the quality of SRA communications

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)



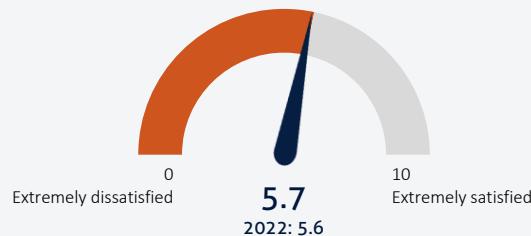
Analysis of the individual responses provided by milling company representatives shows satisfaction ratings on this measure ranged from a rating of 0 through to a rating of 10.

Detailed results

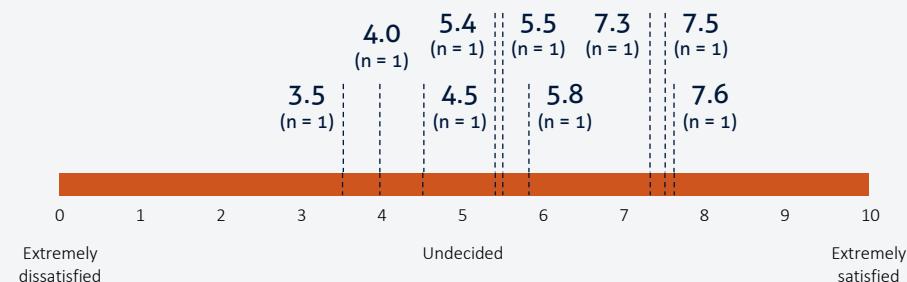
## Performance indicators

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.

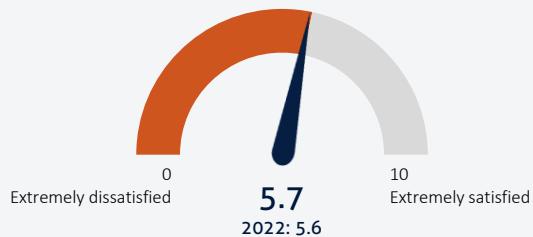
Millers' overall satisfaction rating was at 5.7, a small uplift from the 2022 result.

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.

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)



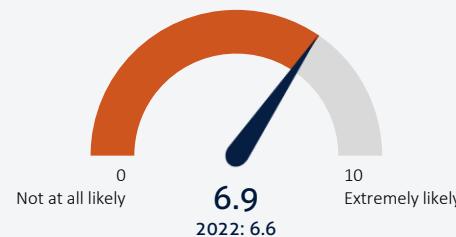
Key measures by milling company representatives rating satisfaction by 0-5 or 6-10:

	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%

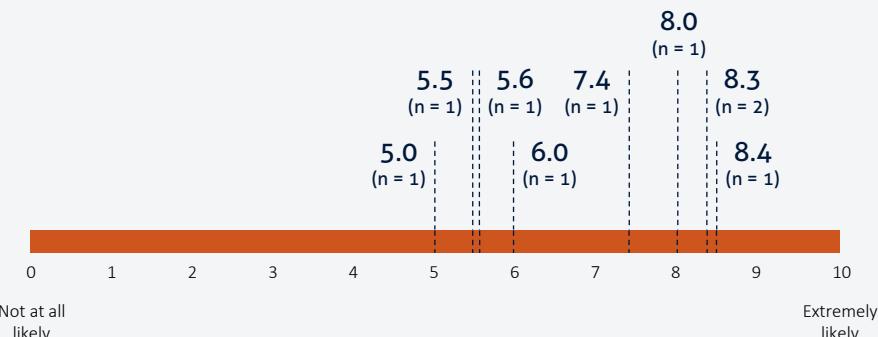
# Advocacy of SRA and Net Promoter Score

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.

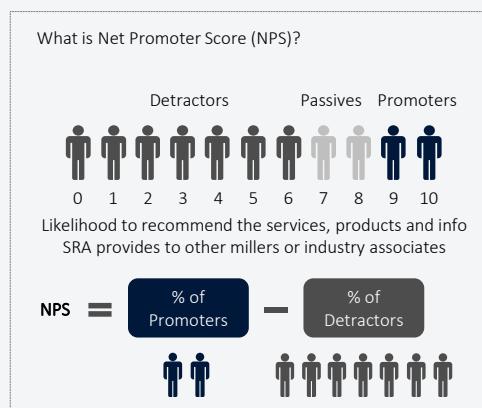
## Net Promoter Score

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%

# Recommendations for SRA to improve their outcomes

Q29. What is your strongest recommendation you would have to SRA to improve the outcomes it achieves through its investment and management of the R&D?

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

"About the value of SRA to deliver some commercial, investment projects to deliver for benefit of the whole industry."

"Encouraging focus on commercial outcomes."

"As the industry shifted to the industry & the government research management rather requirements, in respect of milling, satisfied some local and the specific researchers are doing good work although a good engagement. My concern is the corporate side. Are there tensions between the two, definitely for milling and generally speaking overall, there are some projects where progress has been severely hampered while approvals at the higher level have been held up."

"Right sort of the moment with the right sort of the parties, feed strategic advice. Identify what's industry approach for best possible outcomes for everyone."

"Don't try to be the strongest, don't believe in the people who do the industry's work. Only best input programs and decide a particular group who's agenda doesn't go to the industry like representation, have to come up with ways of getting what a group of people saying for themselves."

"Ensure that milling and government focusing on the same goal and for not always their own."

"There's a more sensible or better way of trying engineering and science and government working in the future regarding our environments."

"One basic for the industry point of view - ensuring that they are considering industry understanding when it's making funding, industry understanding when it's making funding requirements rather than the others. Research R&D expenditure focused more on environmental efficiency in current processes as opposed to what might have been done before, perhaps other sectors are not being given as much support."

"There is provide sensible, relevant to industry, engineering, science, technology - all the stuff they are doing, unlike local government departments, need support from the local government."

"It needs to engage with the milling sector and discuss funding when it's making the budget, increase shareholders, provide better support for the sector it has gone through (pre- and post-merger) with shareholders with SRA for engagement with the milling sector. Really needs to look at funding of approach of projects and processes - innovation, if you want that enough to maintain the sector then it's got to service the sector. If there's not enough funding for the sector then it's not enough to service the sector in."

"It's investing, developing and getting involved and to where the one is going."

"There needs to be able to provide the same, the range of research undertaken in the agriculture engineering component to take into consideration the milling sector. A greater percentage of the funds allocated need to be made available for milling sector with the requirements to come from financial benefit of the research to the farming community."

"Some of a presence and communication better with growers, like with the field, more engagement with government but then issues whether it is for industry, decline price short term borrowing."

"More research programs that will especially around diversification and using alternative resources, etc."

"Particularly for smallholders to discuss the opportunity/realm benefits from research programs for smallholders, like less investment from you than other stakeholders in the area."

"More funding has to go to agriculture research industry deserved to focus on milling. The world is changing rapidly with technological development prioritizing this as more programming and prioritizing."

"With research, more focus and less focus on such as industry, about focusing the key things that they industry needs to do, of course things don't really contribute the industry and what's going to particular businesses."

"More milling members."

"They focused more local, the rest is currently too wide."

"Suggest that researchers better, the industry has got too cumbersome, researchers & industry, the industry has got the funding, the industry is too short (industry is not in, the industry does not really need to be involved, but after it's supported.)"

"The government and the industry right through the program need to recognize the importance of the industry's contribution to the sustainability of the sugar industry."

"The main areas focusing on planning, planning, planning, management, management, management, planning, planning, planning."

"The milling researchers - ensuring they are a sensible way of funding."

"They need to disseminate information especially on the research side of things through extension. Focus on the growing sector, on the large issues that are of having a good control - not strong and enough. From making use of things (parties) sharing, through a party, party working together, party working together is there (SRA) between the two organisations, have extension Officers at the local level, have local Officers at different and under different banners and then competing for funding from various sources - one program, funds provided through the government and some of the same things in the same program - extension."

"Funding from the local government and local members and research, government that have no idea of the sugar industry, having a range of professionals, professionals from various different teams, important for the field and directly but not within the office of SRA (members who have members within the field of industry, qualifications, knowledge.)"

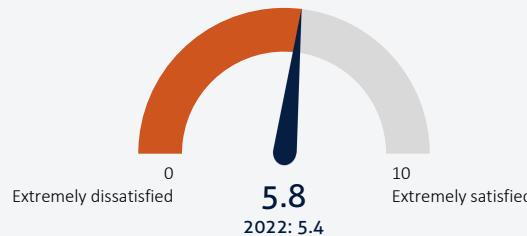
"We need better research shortened of time. Research should be limited their years and it should take 12 years plus. We also have to bring in a plan to reflect new varieties in a shorter period of time."

# Appendices

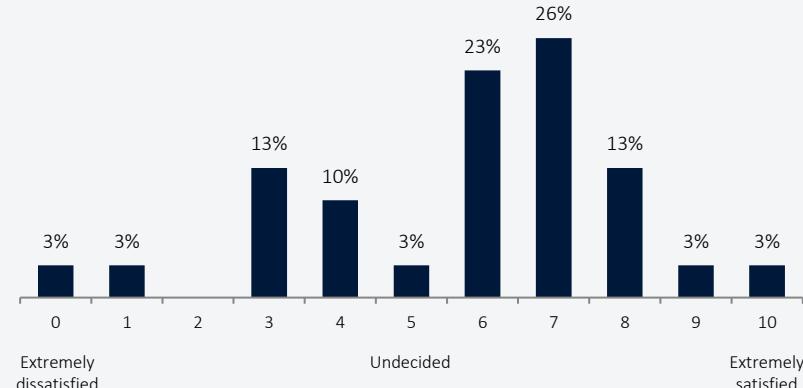
Q27. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?

**(average results of all respondents regardless of milling company)**

Base: All milling company respondents (excluding "Can't say" answers), n = 31



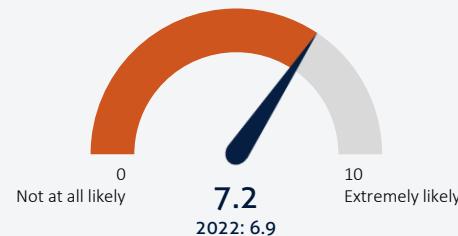
Distribution of ratings



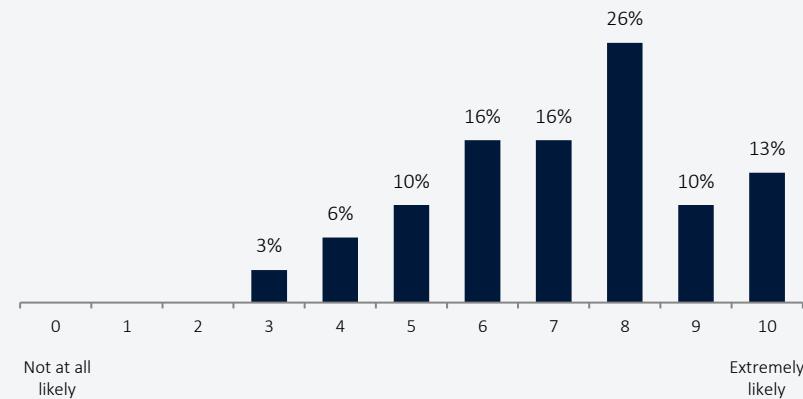
Q29. How likely is that you would recommend the services, products and information SRA provides to other millers or industry associates?

**(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

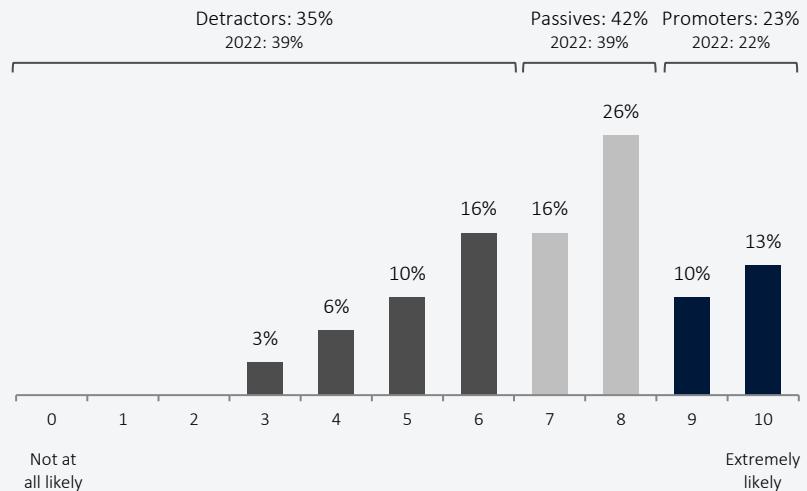
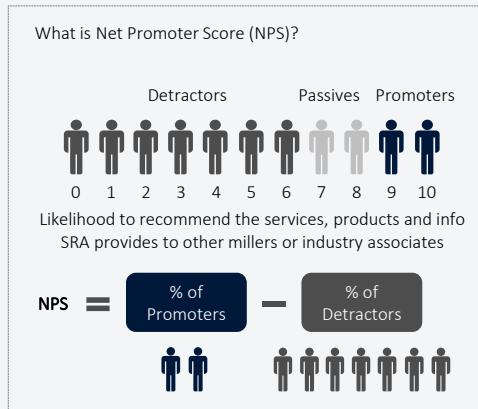
(average results of all respondents regardless of milling company)

Base: All milling company respondents, n = 31



**-13**  
**2022: -17**  
on a scale of  
-100 to +100

# Net Promoter Score



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
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 9<sup>th</sup> May 2023 and remained open until 26<sup>th</sup> May 2023.



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