

Grower and Partner Survey 2024



Context for the research

Hort Innovation advances Australia's \$16 billion horticulture industry by investing in research and development, marketing and trade, to build a prosperous and sustainable future for growers. Hort Innovation partners with Australian and international investors including Government, leading science, technology, and consumer strategy experts to anticipate future challenges and opportunities.

Hort Innovation's role is to capture value from investments to benefit all levy payers.

Through these investments, a focus is on working to improve the productivity, farm gate profitability and global competitiveness of specific industries, and Australian horticulture as a whole.

Sources of funding

Hort Innovation's investments are funded by grower levies and Australian Government contributions, as well as other industry contributions and co-investment. Hort Innovation is owned by growers, and the investments are made on behalf of growers' levy industries.

How investment decisions are made

Hort Innovation invest in line with the priorities identified by each of the 37 levied horticulture commodities. To gain the necessary insight from industry, consultation is undertaken with growers, including with industry-specific advisory panels, which are made up of panellists representing each levy industry, and through other consultation panels and events.

Aim of the Grower and Partner Survey 2024

The Grower and Partner Survey 2024 was designed to:

- Measure key KPIs of the Hort Innovation Strategy 2024-2026.
- Measure the overall 'relationship health' Hort Innovation has with growers, Peak Industry Bodies and Delivery Partners.
- Collect insights from participants to understand how Hort Innovation can improve over time.

Participants in the Grower and Partner Survey 2023

Three key stakeholder cohorts were included in the scope of the Grower and Partner Survey 2024. They were:

Growers

406 grower business owners or representatives
35 out of 37 levied industries participated

Peak Industry Bodies

22 respondents (of 163 PIB representatives that were contacted)
43% of 28 PIBs completed the survey

Delivery partners

87 respondents (of 1,265 representatives that were contacted)
39% of 100 delivery partner organisations completed the survey

This report covers a summary of the ratings provided by all cohorts.

Hort Innovation Grower and Partner Survey 2024

In focus: Growers

Participants: n = 406

Industry outlook

+20 Nett sentiment
(47% positive – 27% negative)

Grower engagement score

50% Calculated measure of grower engagement based on grower perceptions of Hort Innovation across six specific categories

Satisfaction with levy investment

(rating % very satisfied + % satisfied)

40% Satisfied that grower levies directed to research, development, extension and marketing are being invested to achieve the outcomes they expect

Satisfaction with R&D investment

(rating % very satisfied + % satisfied)

39% Satisfied that Hort Innovation's short-term focused investments are delivering outcomes they and industry need

40% Satisfied that Hort Innovation's long-term focused investments will deliver the outcomes the industry and growers need

Satisfaction with marketing and communications*

23% Satisfied that marketing levies are delivering outcomes growers and the industry expect

52% Satisfied with the way in which Hort Innovation communicates directly with growers

Engagement driving change

40%

Of these respondents

of the respondents reported that they had adopted R&D or made a change in practices as a result of Hort Innovation activities

89%

reported at least one of the specified outcomes because of interactions with Hort Innovation

Alignment

29%

(rating % very well + % fairly well)

Industry Strategic Plans and Annual Investment Plans align with the challenges growers face

34%

(rating % agree + % strongly agree)

Agree that marketing plans are aligned with the needs of growers

Impact signals

Thinking back over the past three years, have you made changes to your practices because of outcomes from any of the Hort Innovation information, services or R&D projects?

32%

Have implemented changes

5%

Plans in progress

7%

Intend to make changes

8%

No changes, no intention

48%

Not aware of changes to make

*Asked only to industries that pay a marketing levy or that fund industry communications projects.

61% of respondents believe that growers are aware of very aware that their levies invested by Hort Innovation contribute to the communications projects for their industry.

Hort Innovation Grower and Partner Survey 2024

In focus: Peak Industry Bodies

Participants: n = 22

Industry outlook

+50 Nett sentiment
(63 positive – 13 negative)

Satisfaction with levy investment

(rating % very satisfied + % satisfied)

79% Satisfied that grower levies directed to research, development, extension and marketing are being invested to achieve the outcomes they expect

Satisfaction with R&D investment

(rating % very satisfied + % satisfied)

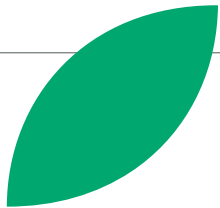
67% Satisfied that Hort Innovation's short-term focused investments are delivering outcomes they and industry need

69% Satisfied that Hort Innovation's long-term focused investments will deliver the outcomes the industry and growers need

Satisfaction with marketing and communications*

43% Satisfied that their marketing levy is delivering the marketing outcomes growers and the industry expect

60% Satisfied with the way in which Hort Innovation communicates directly with growers



Engagement with Hort Innovation

(% rating very effective + % effective)

71% Effectiveness of the engagement Hort Innovation has with their organisation

Alignment

85%
(rating % very well + % fairly well)

Industry Strategic Plans and Annual Investment Plans align with the challenges growers face

43%
(rating % agree + % strongly agree)

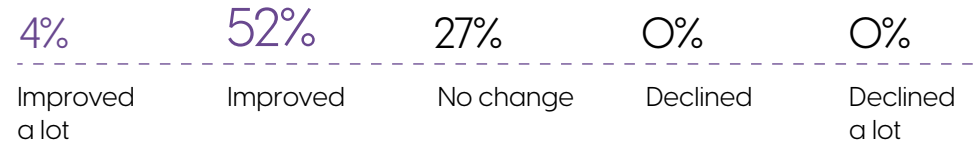
Satisfied that the marketing levy is delivering the marketing outcomes growers and the industry expects.*

Comparison to 12 months ago

Would you say that Hort Innovation's performance on these measures over the past 12 months has improved, stayed the same, or declined?

(Base: All PIB representatives; n = 22)

56% of respondents reported that Hort Innovation's performance on the previous measures has improved over the past 12 months



0% reported being unsure

*Asked only to industries that pay a marketing levy or that fund industry communications projects

Hort Innovation Grower and Partner Survey 2024

In focus: Delivery partners

Participants: n = 87

Engagement with Hort Innovation

(% rating very effective + % effective)

72% Effectiveness of the engagement Hort Innovation has with their organisation

Where hort Innovation rated well

(ratings of 64% or higher for strongly agree/agree OR very satisfied/satisfied)

- Hort Innovation is relevant
- Hort Innovation are accessible
- Hort Innovation delivers when it says it will
- Hort Innovation listens to issues or ideas raised

Where hort Innovation rated lower

(ratings of 59% or lower for strongly agree/agree OR very satisfied/satisfied)

- Hort Innovation brings the right expertise or technical knowledge
- Hort Innovation is consistent
- Hort Innovation is transparent
- Hort Innovation is easy to deal with

Comparison of Hort Innovation's engagement to other partners

(% rating Hort Innovation is much better + better)

45% The processes Hort Innovation uses to engage with your organisation

44% The effectiveness of Hort Innovation's engagement

Likelihood to recommend Hort Innovation

(rating on a 6-10 on a 0-10 likelihood)

85% Are more likely than not to recommend the research and development, information, resources and tools Hort Innovation provides to growers and people working in Australian horticulture

Satisfaction with the research/project processes

(% rating very satisfied + satisfied)

67% Satisfied with the processes, communications and engagement Hort Innovation provides to delivery partners before, during and after commissioned projects

Where Hort Innovation rated well

(ratings of 67% or higher for very satisfied/satisfied)

- Hort Innovation's willingness to discuss concerns or questions during the project
- Frequency of Hort Innovation's comms during the project
- Hort Innovation communications during the project are clear and easy to understand

Where Hort Innovation rated lower

(ratings of 51% or lower for very satisfied/satisfied)

- Hort Innovation's proposal and contracting processes are simple and straightforward
- Hort Innovation collaborates about what information should be released
- Hort Innovation has realistic expectations about its role in extension

Next steps

The Grower and Partner Survey is an important instrument to support Hort Innovation's continuous improvement, gathering feedback on how we are engaging with and delivering outcomes for the horticulture sector.

These results, delivered through Intuitive Solutions, indicate positive support for Hort Innovation's efforts to deepen engagement, trust and connection with key stakeholders.

The results, delivered through Intuitive Solutions, indicated positive progress in PIB and delivery partner engagement, with clear areas for improvement in the engagement of growers.

Themes and opportunities include the following:

- Use of communications channels and direct-to-grower connections
- Reporting the impact of our investments
- Better understanding and alignment of marketing efforts to industry needs
- Refinements to our service model.



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