

Grower and Partner Survey 2025



**Hort
Innovation**

Context for the research

Hort Innovation advances Australia's \$17 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 invests 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 2025

The Grower and Partner Survey 2025 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 2025

Three key stakeholder cohorts were included in the scope of the Grower and Partner Survey 2025. They were:

Growers

408 grower business owners or representatives
36 out of 37 levied industries participated.

Peak Industry Bodies

40 respondents (of 233 PIB representatives that were contacted)
70% of 33 PIBs completed the survey.

Delivery partners

92 respondents (of 85 representatives that were contacted)
Representing 100% of partners with contract value >\$10M.

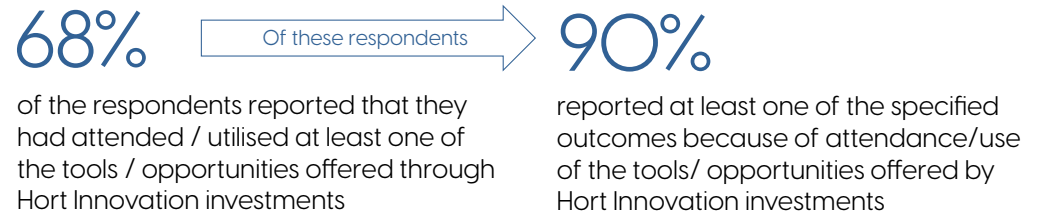
This report covers a summary of the ratings provided by all cohorts.

In focus: Growers

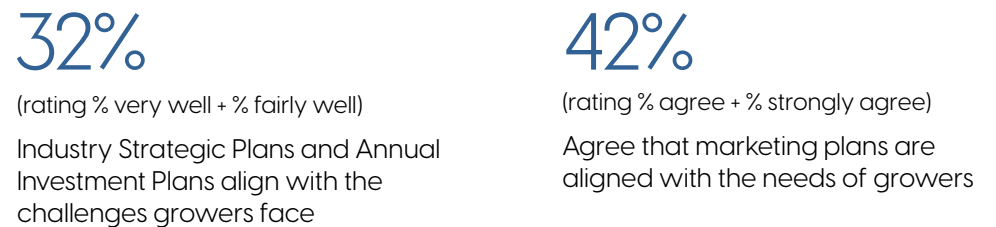
Participants: n = 408

Industry outlook	+24	Nett sentiment (47% positive – 27% negative)
Grower engagement score	51%	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)	40%	Satisfied that Hort Innovation's short-term focused investments are delivering outcomes they and industry need
	42%	Satisfied that Hort Innovation's long-term focused investments will deliver the outcomes the industry and growers need
Satisfaction with marketing and communications*	27%	Satisfied that marketing levies are delivering outcomes growers and the industry expect
	49%	Satisfied with the way in which Hort Innovation communicates directly with growers

Engagement driving change



Alignment



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?

28% Have implemented changes	10% Plans in progress	14% Intend to make changes	10% No changes, no intention	38% Not aware of changes to make
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*Asked only to industries that pay a marketing levy or that fund industry communications projects.

In focus: Peak Industry Bodies

Participants: n = 40

Industry outlook **+65** Nett sentiment (73% positive – 8% negative)

Satisfaction with levy investment **74%** Satisfied that grower levies directed to research, development, extension and marketing are being invested to achieve the outcomes they expect (rating % very satisfied + % satisfied)

Satisfaction with R&D investment **45%** Satisfied that Hort Innovation's short-term focused investments are delivering outcomes they and industry need (rating % very satisfied + % satisfied)

50% Satisfied that Hort Innovation's long-term focused investments will deliver the outcomes the industry and growers need

Satisfaction with marketing and communications* **50%** Satisfied that their marketing levy is delivering the marketing outcomes growers and the industry expect

59% Satisfied with the way in which Hort Innovation communicates directly with growers



Engagement with Hort Innovation

(% rating very effective + % effective)

88% Effectiveness of the engagement Hort Innovation has with their organisation

Alignment

(rating % very well + % fairly well)

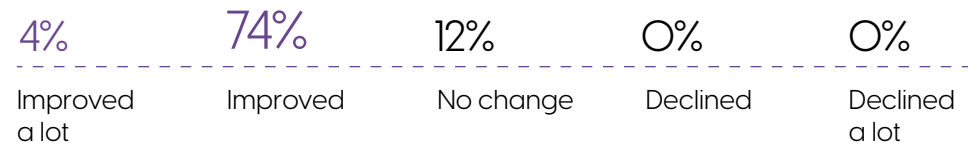
61% Industry Strategic Plans and Annual Investment Plans align with the challenges growers face

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 = 40)

77% 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.

In focus: Delivery partners

Participants: n = 92

Engagement with Hort Innovation

(% rating very effective + % effective)

62% Effectiveness of the engagement Hort Innovation has with their organisation

Where Hort Innovation rated well

(ratings of 62% or higher for strongly agree/agree OR very satisfied/satisfied)

Hort Innovation's engagement is relevant

Hort Innovation follow up when required

Hort Innovation are accessible

Hort Innovation delivers when it says it will

Where Hort Innovation rated lower

(ratings of 52% or lower for strongly agree/agree OR very satisfied/satisfied)

Hort Innovation provides sufficient opportunities for you to contribute ideas and raise issues

Hort Innovation's engagement is consistent

Hort Innovation's engagement is transparent

Hort Innovation's engagement is well planned

Comparison of Hort Innovation's engagement to other partners

(% rating Hort Innovation is much better + better)

36%

The processes Hort Innovation uses to engage with your organisation

34%

The effectiveness of Hort Innovation's engagement

Likelihood to recommend Hort Innovation

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

79% 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)

59% 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 68% 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 40% or lower for very satisfied/satisfied)

Hort Innovation has realistic expectations about their role in extension

Hort Innovation works collaboratively with them to share information with growers and the industry

Hort Innovation collaborates with them about what information should be released

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
- Inform the new round of strategic investment planning to align with growers' needs
- Inform our delivery partner engagement model.



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