Down To Earth Research
ABN: 38 873 356 803
Tel: (03) 9708 8008
Fax: (03) 9787 0367
Email: admin@dter.com.au
Web: www.dter.com.au

Hort Innovation

Stakeholder Sentiment Survey 2017 Report

Primary Hort Innovation contacts:
Warwick Scherf
Barbara Romero-Cespedes
Alison Anderson
Jocelyn Mason
John Vatikiosis

Report author:
Daniel Watson

Contents

DTER would like to thank all survey respondents for assisting with this study.

We appreciate the time and effort taken to provide a considerable amount of data and information.

Executive Summary

Background and methodology

The inaugural Stakeholder Sentiment Survey has been undertaken to provide Hort Innovation baseline data representing its grower stakeholder's perception of the organisation's performance as investors in Research, Development and Marketing (RD&M), communication and interaction with growers and its information products and services.

Data for the project was collected via Computer Assisted Telephone Interviews (CATI) with 400 grower stakeholders randomly selected from Hort Innovation's general member and Levy Revenue Services (LRS) databases.

Quotas were set to ensure each horticultural industry was included and the sample of Hort Innovation members and non-members was stratified to ensure results were not disproportionately affected by conducting too many interviews in one industry. Data has been aggregated into industry cluster to allow for robust statistical comparison between segments in this survey as well as allowing for future longitudinal comparisons.

On typical measurements involving the entire sample, the standard error at the 95% confidence level is approximately ±4.1%. Additionally, an excellent response rate (74%; interviews versus refusals) ensures a high level of confidence in results.

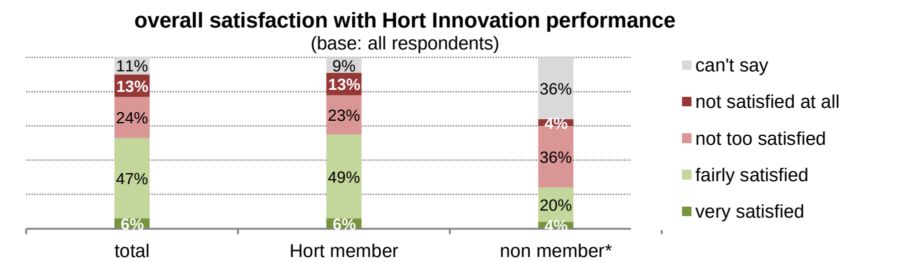
Survey results

Grower stakeholder knowledge of Hort Innovation activities

- Knowledge of Hort Innovation activities is widespread, with 74% of respondents saying they have fair to considerable knowledge. There is however, a sizeable proportion (26%) with little to no knowledge and this is particularly the case among non-members of Hort Innovation.

Overall satisfaction with Hort Innovation performance

Figure 1



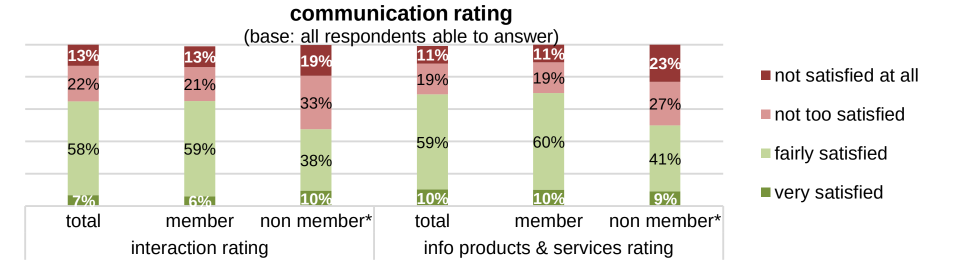
*caution small sample size

- Despite widespread awareness of Hort Innovation activities, 53% of respondents are currently satisfied with the organisation's performance as investors in horticultural RD&M. Of note, satisfaction varies significantly by industry cluster, from 60% among temperate fruit growers to 41% from nut industries.
- Additionally, members of Hort Innovation are considerably more likely to rate the organisation's performance highly than non-members.
- Satisfaction with Hort Innovation typically stems from agreement with Research Development and Marketing priorities as well as perceiving Hort Innovation programs to be beneficial. The main reasons given for dissatisfaction are linked to demand for greater collaboration, not seeing RD&M benefits and a perceived lack of industry specific focus.

Satisfaction with communication and information products and services

- Over the past 2 years, the vast majority of respondents (87%) have had at least some interaction with Hort Innovation, typically via industry events, face to face engagement and/or interaction with the Strategic Investment Advisory Panel (SIAP).
- Satisfaction with interaction is relatively widespread (65% of all respondents), but only 7% of this group are *very* satisfied.
- Positive sentiment towards interaction is typically due to having regular, open communication and/or ensuring growers are kept up to date and informed. Conversely, insufficient interaction and/or collaboration and a belief feedback is not actioned are the most common reasons growers are dissatisfied.

Figure 2



*caution small sample size

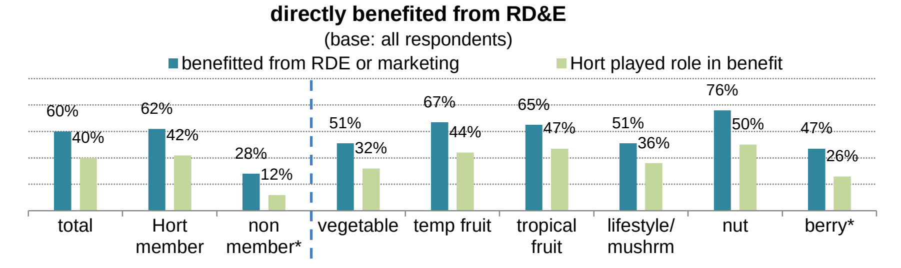
- Hort Innovation's information products and services have been accessed by the majority of respondents (83%), however access is considerably more widespread among members (95%) than non-members (36%). On average, between 2 and 3 products and services have been accessed, most commonly *Growing Innovation* and *Hortlink*.
- Satisfaction with the organisation's information products and services is relatively widespread (69%), but only 1 in 10 of this group are *very* satisfied. Notably, satisfaction is considerably more widespread among younger growers (aged 18-39).
- Providing materials regularly and including content addressing relevant industry issues are key satisfaction drivers, whereas dissatisfaction most commonly results from belief a greater focus on industry specific information is required and that some content is not relevant.

Executive Summary

Direct benefits felt from RDE&M

- 60% of all respondents feel they benefitted from Research, Development, Extension or Marketing (RDE or M) and 40% (67% of those benefitting from RDE or M) believe Hort Innovation played a role in these benefits.
- Notably, respondents from businesses turning over greater than 10 million dollars (categorised in this report as x-large businesses) and those from the nut, temperate and tropical fruit industries are considerably more likely than their counterparts to feel they have benefited from RDE or M.

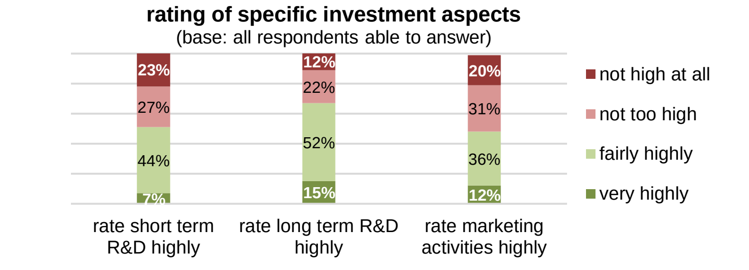
Figure 3



*caution small sample size

Perception of specific investment aspects

Figure 4

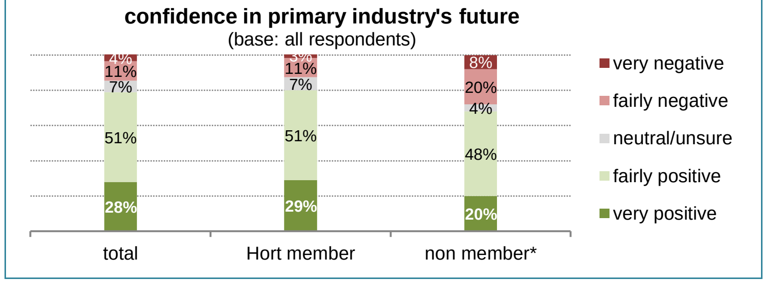


- Two thirds (67% of respondents aware of Hort Innovation activities and able to answer) rate Hort Innovation's investment into long term R&D highly. Notably, there is no significant variation in this proportion by member and non- member, industry cluster or enterprise size.
- Ratings for Hort Innovation's investment in R&D that provides short term benefits however are significantly lower, with 50% rating this aspect *fairly* to *very* highly. Consequently, this is an important area for Hort Innovation to focus on in future.
- Similarly, marketing activities are rated highly by less than half (49%) of those paying a marketing levy and although sample sizes are too small to draw definite conclusions, respondents from the nut and berry sectors are the least likely to be satisfied.

Confidence in primary industry's future

- In line with other studies DTER conducts in the agricultural sector, confidence in the future of respondent's main industry is widespread (79%). However, growers from nut and tropical fruit industries are considerably more likely to be positive than vegetable and berry counterparts.

Figure 5



*caution small sample size

- As a result of widespread confidence, a relatively large proportion of all respondents are expanding their enterprises (44%) compared to 1 in 10 in a winding down phase.
- Respondents from large to x-large large businesses and Hort Innovation members are considerably more likely than their counterparts to be expanding their enterprise.

Executive Summary

Sentiment Survey snapshot

400 random CATI

100% of industries represented

375 Hort Innovation members

25 non-members

74% response rate

16 minute average interview length

Knowledge of Hort Innovation

74% know a fair to considerable amount about Hort Innovation

Overall satisfaction

53% satisfied with performance as investors in RD&M

Communication sentiment

65% satisfied with interaction

Products and services

69% satisfied with Hort Innovation products and services

Short term R&D

50% rate R&D for short term gains highly

Long term R&D

67% rate long term industry R&D highly

Marketing activities

49% of respondents paying a marketing levy rate investments highly

Benefitted from RDE or M

40% believe Hort Innovation played a role in benefits from RDE or M

Confidence in industry's future

79% of respondents confident in the future of their main industry

Conclusions and recommendations

- In a positive result, Hort Innovation has interacted with a large proportion of respondents over the past 2 years and the majority have accessed at least 1 of the organisation's information products and services. As a result, knowledge of Hort Innovation's activities is widespread, but as expected, less so among non-members.

- Despite this result, survey results suggest room for improvement in the proportion of growers satisfied with Hort Innovation's overall performance. Notably, respondents from nut and lifestyle/mushroom industries are as likely to be dissatisfied with the organisation's performance as satisfied. Monitoring these metrics in future surveys will be important.

- Survey results suggest dissatisfaction with R&D that has a short term outlook and marketing investments may be impacting overall satisfaction and these areas represent an opportunity for Hort Innovation to improve grower sentiment. Additionally, there is some evidence to suggest that greater collaboration with growers and focussing on industry specific programs and information would improve overall grower satisfaction.

- Encouragingly however, two thirds of respondents rate Hort Innovation's long term R&D investments highly and it may be worthwhile exploring reasons behind growers being considerably more likely to rate this highly than the short term equivalent.

- While the majority of all respondents have had interaction with Hort Innovation over the past 2 years, as expected it is considerably more widespread among members than non-members, but notably, a large proportion of growers from each segment desire greater engagement. Encouragingly, interacting via events funded by Hort Innovation, face to face contact with staff and/or through the SIAP is correlated with positive sentiment. However only 1 in 10 of all growers are very satisfied, and survey results suggest that regular, open communication, ensuring feedback is actioned and streamlining processes may improve sentiment.

- Encouragingly, Hort Innovation has succeeded in extending its information products and services to the majority of respondents and satisfaction with the suite of products and services is relatively widespread, particularly among younger growers – a good finding if this segment has been a focus. Despite this result, there remains considerable room to improve in the proportion very satisfied and there is some evidence that providing more industry specific information and face to face contact with some segments of growers may improve sentiment.

- Confidence in the future of respondent's main industries is widespread and this is reflected in a significantly higher proportion currently expanding their enterprise than winding down.

1. Background, objectives and methodology

Introduction

Horticulture Innovation Australia (Hort Innovation) has identified the need through its *Organisational Evaluation Framework* to better understand its grower stakeholder's sentiment towards the organisation's performance as investors in Research and Development (R&D) and marketing, communication and interaction and its information products and services.

One of the key initiatives under the Evaluation Framework is the undertaking of a Stakeholder Sentiment Survey, designed to collect baseline data in 2017 and track performance longitudinally. Consequently, Hort Innovation commissioned Down To Earth Research (DTER) to conduct a survey of growers to collect data required to inform future decisions.

The following key areas are covered in this year's survey:

- Level of awareness and knowledge about Hort Innovation activities
- Overall performance of Hort Innovation as an investor in horticulture research and marketing
- Performance of Hort Innovation in delivering short and longer term R&D benefits to members and industry
- Performance of Hort Innovation in delivering marketing improvements
- Perception of Hort Innovation engagement and working with industry
- Awareness and sentiment towards information products and services offered
- Impact and benefits felt from Research, Development, Extension and Marketing (RDE&M) investments and Hort Innovation's role, if any, in benefits
- Confidence in the future of the horticulture industry generally and individual sectors
- Current phase of enterprise – expanding, steady or winding down

Methodology

- Computer Assisted Telephone Interviews (CATI) were conducted to collect data for the project. This method ensures the survey data includes representation from all horticulture industries using stratified sampling techniques. Additionally it provides for accurate future longitudinal comparison of results.
- Interviews were conducted during October and November 2017 from a fully supervised central call centre in Melbourne using a structured questionnaire (see Appendix). Average interview length was approximately 16 minutes, considerably longer than the 10 minutes anticipated, mainly due to respondents wanting to provide insightful feedback in the open ended questions.
- Growers interviewed were randomly selected either from Hort innovation's member and Levy Revenue Services (LRS) databases.
- In total, 400 grower stakeholders were interviewed, consisting of 375 Hort Innovation members and 25 non-members.
- There was good co-operation from growers, with an excellent overall response rate of 74% achieved (interviews versus refusals). This level of participation provides a high level of confidence in results.
- Quotas for Hort Innovation members and non-members were set for each industry to ensure results were not disproportionately affected by conducting too many interviews in one industry and to guarantee each industry was represented. This methodology meant data did not have to be weighted prior to analysis.
- Where respondents' businesses covered multiple industries, quotas were filled based on the main product grown.
- Data has also been aggregated into industry cluster to allow for robust statistical comparison in this survey as well as longitudinally.

Standard error and limitations of the data

The sample of horticulture growers participating in the survey was 400. On typical measurements involving the whole sample (where 70% of respondents concur), the standard error at the 95% confidence level is approximately ±4.1%.

Readers should exercise caution when examining responses for industry categories with relatively small sample sizes (for example berries). The table below summarises the standard error at the 95% confidence level for different sample sizes:

sample base	margin for error
400	±4.1%
300	±4.9%
250	±5.3%
200	±6.1%
150	±7.1%
100	±8.8%
50	±12.6%
30	±16.3%

2. Report notes and definitions

Report notes and definitions

Throughout this report, reference is made to various segments, defined in the table below:

Primary industry cluster	Vegetable	Onion, potato, sweet potato and other vegetable
	Temperate fruit	Apple/pear, cherry, citrus, dried/table grape, dried tree fruit, olive, prune, summer fruit
	Tropical fruit	Avocado, banana, custard apple, lychee, mango, melon, papaya, passionfruit, persimmon, pineapple
	Lifestyle/mushroom	Nursery, mushroom and turf
	Nut	Almond, chestnut, macadamia & pistachio
	Berry	Raspberry and blackberry, strawberry and blueberry
Farm phase	Expanding	Respondents from businesses currently in an expansion phase
	Steady, happy	Respondents from businesses in a static phase due to being where it is wanted
	Steady, unable	Respondents from businesses in a static phase due to currently being unable to expand for one reason or another
	Winding down	Respondents from businesses in a winding down phase
Age group	<40 (younger growers)	Growers aged 18-39 years
	40-59	40-59 year old growers
	60+	Growers aged 60 years or older
Business size	Small	Respondents from businesses turning over less than $500,000
	Medium	Respondents from businesses turning over $500,001 to 2 million dollars
	Large	Respondents from businesses turning over 2 million to 10 million dollars
	Extra large	Respondents from businesses turning over greater than 10 million dollars

NFI

Readers will notice '(nfi)' typed after some tabulated responses from survey participants. This means 'no further information' and indicates that respondents could only offer a general response to the question asked and despite interviewers probing carefully (without prompting), more specific details were not forthcoming.

Sample bases

Throughout this report, bases used for measuring various aspects vary. Readers should note that bases are identified for all report sections, tabulations and charts.

Statistically significant differences

In this report, only statistically significant differences at the 95% confidence level are commented on. If no reference is made of a difference between segments, the reader can safely assume it is because the difference is not significant.

3. Respondent profile

demographics	% mentioning (base: all respondents)								
		Membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Age									
18-39	16%	15%	20%	26%	10%	18%	15%	3%	11%
40-59	46%	47%	36%	54%	47%	40%	51%	38%	37%
60+	38%	38%	44%	20%	43%	42%	34%	59%	53%
Average age	54	54	53	49	56	55	53	60	57
Turnover									
$200,000 to $500,000	33%	32%	40%	17%	38%	41%	14%	65%	37%
$500,001 to 1 million	14%	14%	12%	9%	16%	14%	16%	9%	16%
1 million to 2 million	18%	18%	16%	21%	16%	15%	28%	9%	21%
2 million to 10 million	21%	21%	8%	25%	20%	19%	26%	6%	16%
Greater than 10million	12%	12%	4%	21%	9%	7%	10%	12%	11%
Refused	4%	2%	20%	7%	1%	4%	6%	0%	0%
Gender									
Male	80%	80%	72%	79%	79%	85%	72%	91%	74%
Female	20%	20%	28%	21%	21%	15%	28%	9%	26%
Enterprise phase									
Expansion phase	44%	46%	20%	32%	50%	38%	52%	44%	58%
Steady phase, as desired	31%	31%	32%	33%	24%	36%	35%	35%	21%
Steady phase, unable to expand	16%	15%	28%	30%	12%	19%	3%	15%	11%
Winding down	9%	8%	20%	5%	14%	7%	10%	6%	11%

*Caution small sub sample

Figure 6

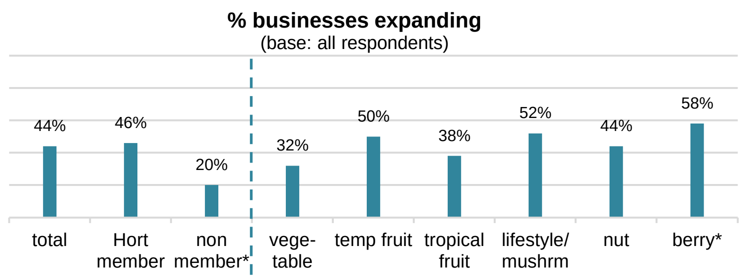


Figure 7

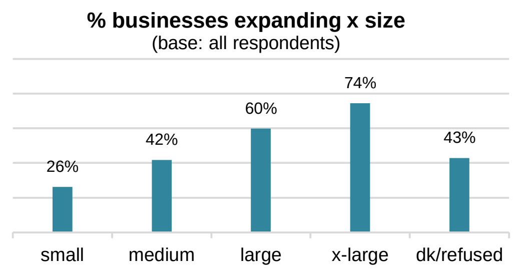
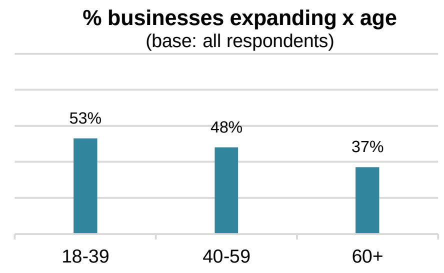


Figure 8



Notable results.

- The majority of respondents are male with an average age of 54. While the mean age is a similar result to other studies DTER conducts on behalf of RDC's, the proportion of females is significantly higher.
- Almost half of respondent enterprises are in an expansion phase (44%), however the proportion is greater among Hort Innovation members (46%) than non-members (20%).
- Additionally, the proportion of businesses expanding correlates with increased enterprise size (by turnover) and younger age groups.
- Notably, the proportion of businesses in an expansion phase is considerably greater in the horticulture sector than other sectors for which DTER has conducted stakeholder surveys.
- On average, 1 in 10 businesses are in a winding down phase. It should be noted this group typically includes smaller businesses run by older producers.

Implications

Overall, the horticulture sector appears to be quite strong, with a comparatively large proportion of businesses in an expansion phase or in a steady phase due to being satisfied with the status quo.

In terms of survey participation, there appears to be a good spread of business size included in the sample and quotas applied mean that each individual horticulture industry is represented.

4. Main industry

main industry	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Vegetable	16%	16%	24%	75%	0%	0%	0%	0%	0%
Nursery	11%	11%	0%	0%	0%	0%	62%	0%	0%
Apple & Pear	10%	10%	8%	0%	34%	0%	0%	0%	0%
Avocado	7%	8%	0%	0%	0%	40%	0%	0%	0%
Turf	6%	4%	28%	0%	0%	0%	33%	0%	0%
Citrus	5%	5%	0%	0%	17%	0%	0%	0%	0%
Macadamia	5%	5%	0%	0%	0%	0%	0%	53%	0%
Summerfruit	4%	4%	4%	0%	15%	0%	0%	0%	0%
Pineapple	3%	3%	0%	0%	0%	18%	0%	0%	0%
Cherry	3%	3%	4%	0%	10%	0%	0%	0%	0%
Banana	2%	2%	4%	0%	0%	12%	0%	0%	0%
Potato - fresh	2%	2%	0%	10%	0%	0%	0%	0%	0%
Olive	2%	2%	0%	0%	7%	0%	0%	0%	0%
Potato - value added/processing	2%	2%	0%	9%	0%	0%	0%	0%	0%
Strawberry	2%	2%	0%	0%	0%	0%	0%	0%	42%
Table grape	2%	2%	4%	0%	7%	0%	0%	0%	0%
Almond	2%	2%	0%	0%	0%	0%	0%	21%	0%
Chestnut	2%	2%	4%	0%	0%	1%	0%	18%	0%
Blueberries	2%	2%	0%	0%	0%	0%	0%	0%	32%
Dried grape	2%	2%	0%	0%	5%	0%	0%	0%	0%
Mango	2%	2%	0%	0%	0%	8%	0%	0%	0%
Passionfruit	2%	2%	0%	0%	0%	8%	0%	0%	0%
Raspberry and blackberry	1%	1%	4%	0%	0%	0%	0%	0%	26%
Custard apple	1%	1%	0%	0%	0%	5%	0%	0%	0%
Dried treefruit	1%	1%	8%	0%	3%	0%	0%	0%	0%
Lychee	1%	0%	0%	0%	0%	4%	0%	0%	0%
Mushroom	1%	1%	0%	0%	0%	0%	4%	0%	0%
Pistachio	1%	1%	0%	0%	0%	0%	0%	6%	0%
Dried prune (n=1)	0%	0%	0%	0%	1%	0%	0%	0%	0%
Melons (n=1)	0%	0%	0%	0%	0%	1%	0%	0%	0%
Onion (n=1)	0%	0%	0%	1%	0%	0%	0%	0%	0%
Papaya (n=1)	0%	0%	4%	0%	0%	1%	0%	0%	0%
Persimmon (n=1)	0%	0%	0%	0%	0%	1%	0%	0%	0%

*Caution small sub sample

Notable results	Implications
◆ The sample represents respondents from each industry. ◆ Readers should note there are 25 non-members included in the sample, of this number 6 are from vegetable industries and 7 from the turf industry.	Survey methodology has successfully ensured that each horticultural industry is represented.

5. Knowledge of Hort Innovation activities

Questions asked: Q6. Prior to what was just explained, how much would you say you knew about what Hort Innovation actually does?

knowledge of Hort Innovation activities	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
A considerable amount	35%	37%	4%	39%	39%	34%	32%	26%	32%
A fair amount	39%	39%	32%	33%	39%	40%	30%	59%	42%
A small amount	16%	15%	28%	18%	14%	19%	19%	15%	5%
A very little amount	8%	7%	24%	7%	6%	5%	16%	0%	16%
Nothing at all	2%	2%	12%	2%	3%	1%	3%	0%	5%
Total: considerable/fair amount	74%	76%	36%	72%	78%	74%	62%	85%	74%
Total: small amount/very little/nothing	26%	24%	64%	28%	22%	26%	38%	15%	26%

*Caution small sub sample

Figure 9

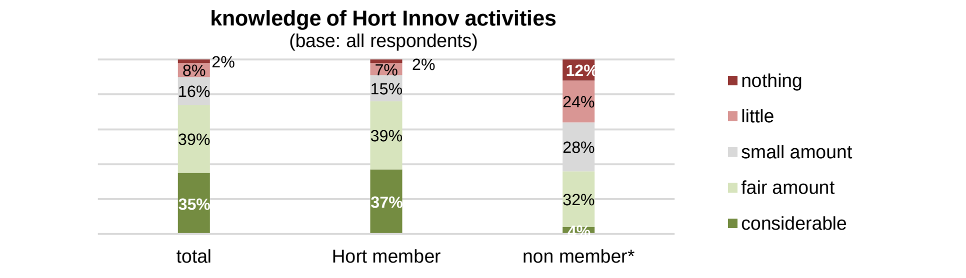


Figure 10

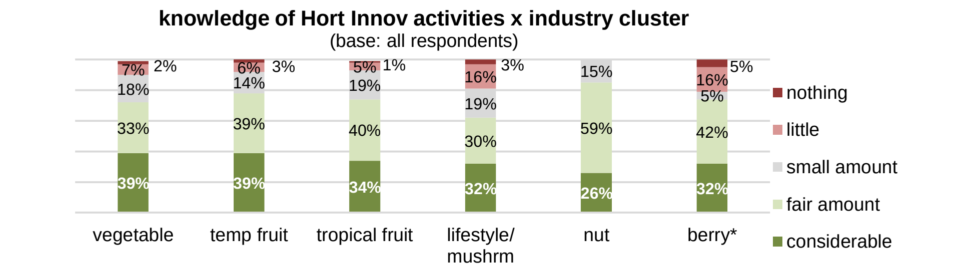


Figure 11

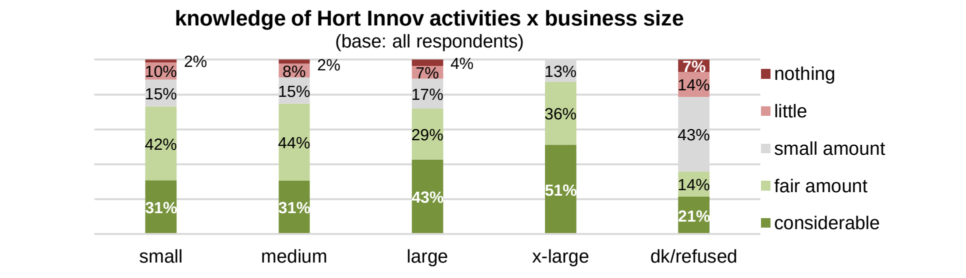
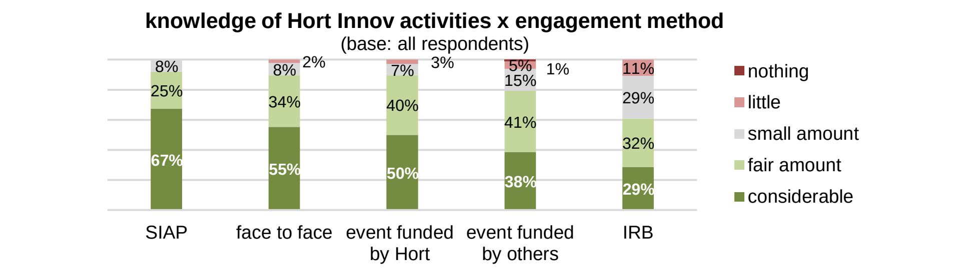


Figure 12



*Caution small sub sample

Notable results.

- Overall, 74% of respondents say they know either a *fair* (39%) or *considerable* (35%) amount about Hort Innovation's activities. As expected, the proportion is significantly higher amongst members (76%, including 37% knowing a *considerable* amount) than non-members (36%, 4% knowing a *considerable* amount).
- Similarly, the proportion saying they know a *fair* to *considerable* amount varies by industry cluster, from a high 85% among respondents from nut industries to a significantly lower 62% of those from lifestyle/mushroom industries.
- *Considerable* knowledge of Hort Innovation activities is significantly more widespread among respondents from x-large enterprises (51%) than those from small and medium businesses (31%).
- Likewise, although the metrics are not mutually exclusive, those having at least some interaction through the SIAP (67%), face to face (55%) and/or events funded by Hort (50%) are significantly more likely to have *considerable* knowledge of Hort Innovation activities than those interacting through events perceived to be funded by others (38%) or an Industry Representative Body (IRB) (29%).

Implications

Encouragingly, the majority of growers have a fair to considerable knowledge of what Hort Innovation does, mainly as a result of interaction through the SIAP, face to face contact and industry events and a large proportion of growers accessing the organisation's information products and services.

6. Engagement and interaction

6.1 Method of interaction with Hort Innovation

Questions asked: *Q7. Over the past 2 years, have you interacted with Hort Innovation through any of the following methods?*

engagement	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Industry events **funded by someone else****	66%	69%	24%	59%	73%	65%	54%	82%	74%
Industry events **funded by Hort Innovation****	51%	53%	16%	43%	52%	57%	42%	74%	53%
Face to face contact with Hort Innovation staff	46%	49%	0%	47%	46%	51%	36%	62%	26%
Through the SIAP (Strategic Investment Advisory Panels)	25%	27%	0%	25%	23%	28%	20%	38%	21%
Through IRB✝	7%	7%	4%	6%	5%	7%	12%	9%	5%
Via email✝	6%	6%	0%	6%	2%	10%	7%	9%	5%
Can't recall/don't know	3%	3%	4%	6%	0%	4%	6%	3%	0%
Have not found out anything over past year	13%	10%	64%	18%	12%	11%	16%	3%	11%

*Caution sub sample **based on respondents perception of organisation providing funding ✝ Nominated via 'other mentions' option at question

Figure 13

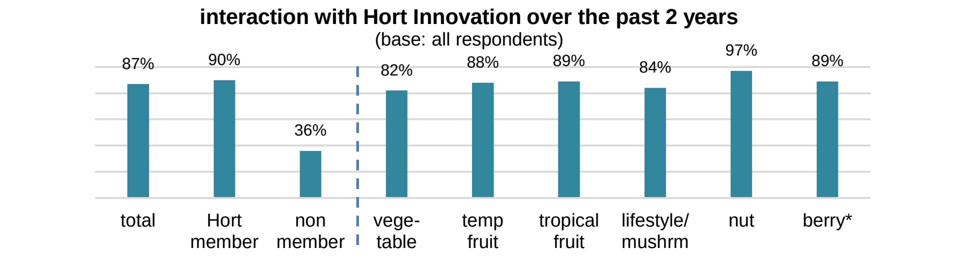


Figure 14

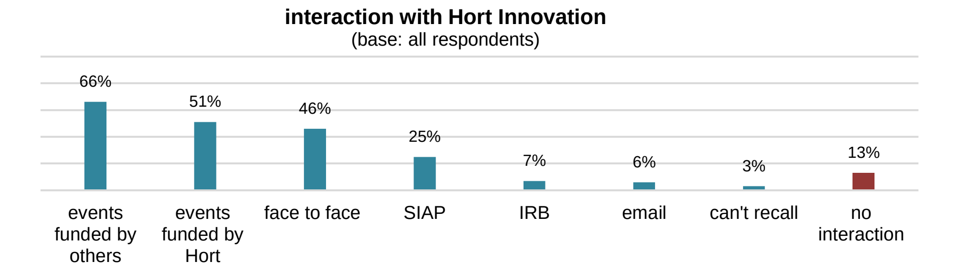


Figure 15

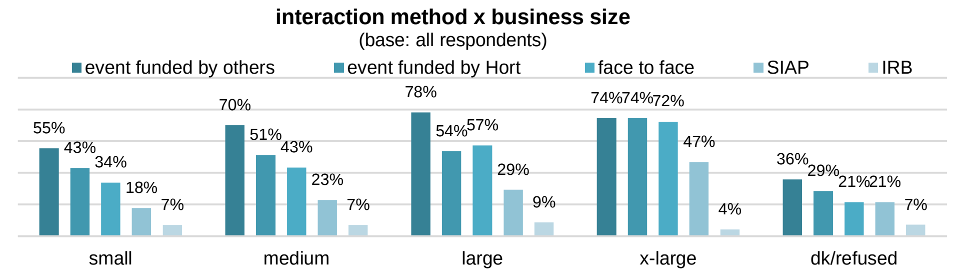
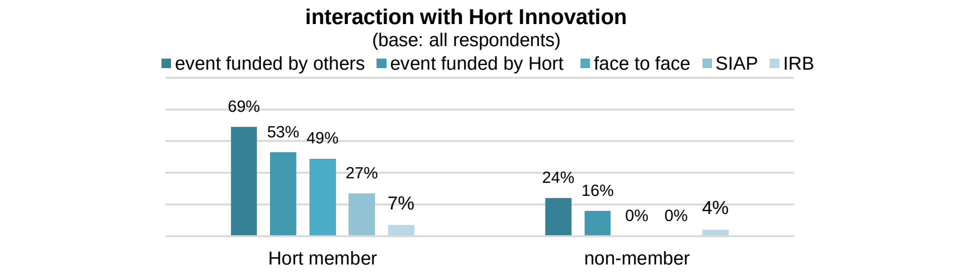


Figure 16



Notable results.

- Almost 9 in 10 (87%) respondents have interacted with Hort Innovation over the past 2 years, ranging from 90% of members to 36% of non-members.
- Notably, respondents are significantly more likely to say they interacted with Hort Innovation through events perceived to be funded by others (66%) than those funded directly by Hort Innovation (51%).
- For each engagement method, Hort Innovation members are considerably more likely to have had interaction than non-members.
- Almost half (46%) of respondents had face to face interaction, but this varies significantly by industry cluster, from 62% among nut producers to 36% among lifestyle/mushroom growers and 26% from Berry industries.
- Similarly, those from x-large (72%) and large (57%) enterprises are considerably more likely to have had face to face interaction than small (34%) and medium (43%) counterparts.
- Overall, 25% of respondents had some interaction with their industry's SIAP, however the proportion is considerably greater among respondents from x-large businesses (47%) than those from large (29%), medium (29%) and small (18%).
- Encouragingly respondents interacting through events funded by Hort, face to face engagement and the SIAP are considerably more likely to be satisfied with their overall interaction than those engaging through the IRB, events perceived to be funded by other organisations or not having contact.

Implications

Survey results suggest over the past 2 years Hort Innovation has interacted with a large proportion of respondents, not only directly, but also at events perceived to be funded by other organisations. Further investigation may be warranted to explore whether Hort Innovation funding was associated with these events, but growers were unaware of the association.

Other sections of this report reveal that respondents are typically at least fairly satisfied with interaction that has occurred and Hort Innovation should be encouraged by these results.

6.2 Rating of interaction with Hort Innovation

Questions asked: *Q8. Overall how satisfied are you with your interaction with Hort Innovation?*

engagement rating	% mentioning (base: all respondents able to answer)								
		membership		primary industry cluster					
	total (n=393)	Hort member (n=372)	non member* (n=21)	vegetable (n=85)	temp fruit (n=114)	trop fruit (n=73)	lifestyle/ mush (n=66)	nut (n=34)	berry* (n=19)
Very satisfied	7%	6%	10%	8%	9%	3%	5%	0%	21%
Fairly satisfied	58%	59%	38%	56%	60%	68%	48%	62%	42%
Not too satisfied	22%	21%	33%	21%	19%	16%	32%	24%	21%
Not satisfied at all	13%	13%	19%	14%	12%	12%	15%	15%	16%
Total: satisfied	65%	66%	48%	65%	68%	71%	53%	62%	63%
Total: not satisfied	35%	34%	52%	35%	32%	29%	47%	38%	37%

*caution small sample size

Figure 17

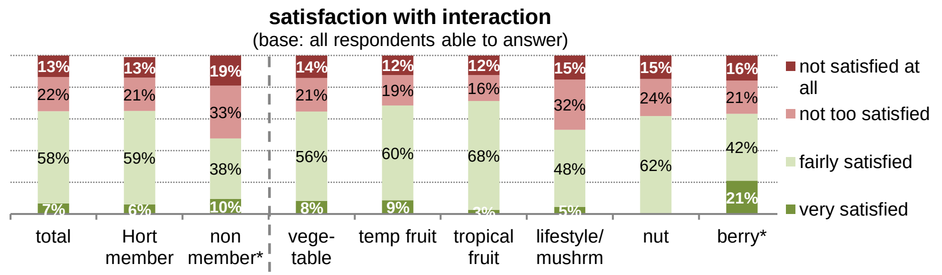


Figure 18

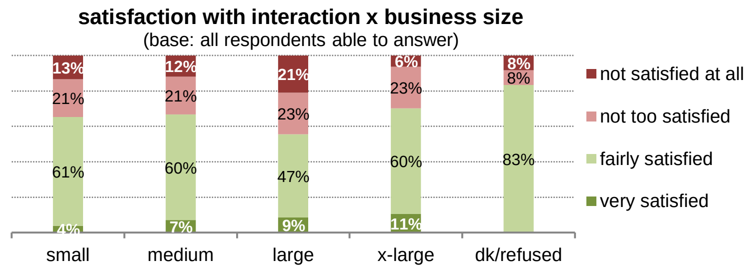


Figure 19

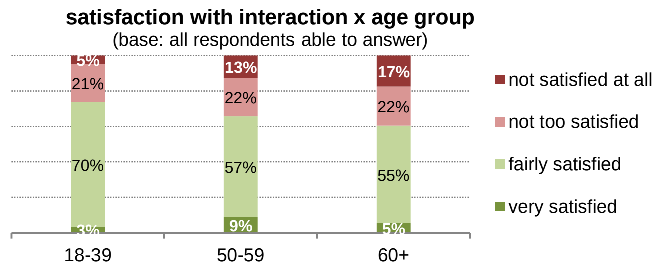
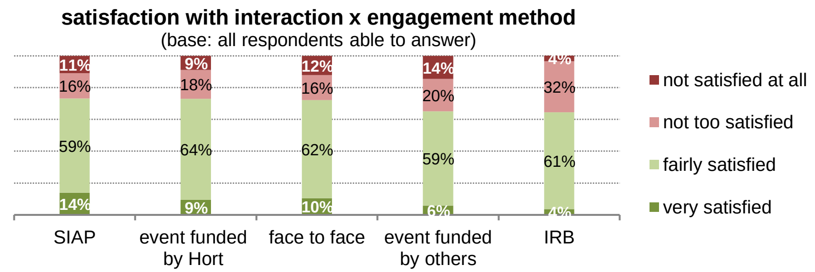


Figure 20



Notable results.

- Two thirds (65%) of respondents able to rate their interaction with Hort Innovation are satisfied, but only 7% are *very* satisfied. Satisfaction varies significantly by industry cluster, from a high 71% among tropical fruit growers to a low 53% of those from lifestyle/mushroom.
- Of note, there is no significant variation by enterprise size.
- However, satisfaction with engagement is slightly more widespread among younger growers (74% aged 18-39) than counterparts aged 60+ (60%).
- Further analysis of data reveals respondents having face to face contact with Hort Innovation are considerably more likely to be *very* (10%) or *fairly* (62%) satisfied than those not having this engagement (3% and 55% respectively).
- Among those interacting through the SIAP, 72% are *fairly* to *very* satisfied compared a considerably lower 62% of those not engaging via the SIAP.
- Although sample sizes are too small to draw definitive conclusions, growers *very* satisfied with their interaction are significantly more likely than counterparts (including those fairly satisfied) to say they have regular and open communication, feedback is actioned and Hort Innovation has knowledgeable, hard-working staff.
- Of note, approximately half of those not having any interaction with Hort Innovation over the past 2 years are satisfied with this.

Implications

While satisfaction with Hort Innovation interaction is relatively widespread, there is clearly room to increase the proportion of growers *very satisfied*. Additionally, activities ensuring those dissatisfied become satisfied will be important.

Survey results suggest that increasing the number of interactions, open communication, streamlining engagement processes and/or ensuring any feedback received is actioned or (if not actionable) noted may increase levels of satisfaction.

6.3 Reason for rating interaction

Questions asked: Q9. Why do you say that (from Q8)?

reason for rating interaction	% mentioning (base: all respondents able to answer)								
		membership		primary industry cluster					
	total (n=393)	Hort member (n=372)	non member* (n=21)	vegetable (n=85)	temp fruit (n=114)	trop fruit (n=73)	lifestyle/ mush (n=67)	nut (n=34)	berry* (n=18)
Positive mentions									
Keep growers informed/updated	14%	15%	10%	18%	14%	19%	6%	15%	11%
Open communication/good quality interaction	11%	11%	0%	19%	11%	8%	9%	6%	0%
Happy with existing interaction (nfi)	9%	8%	19%	7%	9%	4%	15%	6%	21%
Regular interaction	6%	6%	0%	9%	6%	5%	3%	6%	0%
Acted on feedback/interaction	3%	3%	0%	5%	1%	5%	2%	6%	5%
Benefitted from research/agree with priorities	3%	3%	0%	1%	5%	3%	3%	3%	5%
Knowledgeable/hard-working staff	3%	2%	5%	2%	5%	1%	2%	0%	0%
Doing a good job/improved (nfi)	2%	1%	5%	2%	0%	1%	2%	3%	5%
Negative mentions									
Insufficient interaction/desire more interaction	17%	15%	43%	20%	21%	10%	14%	15%	16%
Not seeing results/benefits	9%	9%	14%	6%	10%	12%	11%	3%	21%
Insufficient consultation/input from growers	9%	9%	0%	7%	8%	12%	9%	9%	5%
Not actioning grower feedback sufficiently	8%	8%	0%	7%	6%	5%	12%	18%	0%
Slow reaction/complicated processes	6%	6%	0%	5%	8%	8%	5%	6%	0%
Need greater focus on respondent's industry	5%	5%	0%	2%	4%	7%	11%	0%	5%
Respondent doesn't have time to interact	5%	5%	0%	8%	2%	7%	5%	0%	5%
Not enough face to face contact	4%	4%	0%	1%	7%	1%	3%	9%	0%
Lack of consultation with smaller/niche businesses	2%	2%	0%	1%	4%	1%	3%	0%	0%
Lack of transparency	2%	2%	0%	0%	1%	3%	2%	9%	5%
Prefer interaction to come through industry bodies	2%	2%	5%	0%	4%	1%	5%	0%	0%

*Caution small sub sample

Figure 21

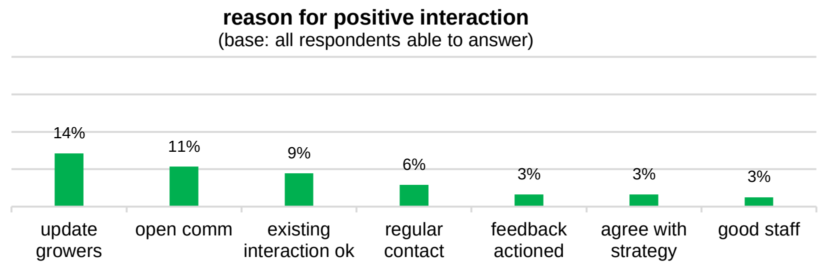


Figure 22

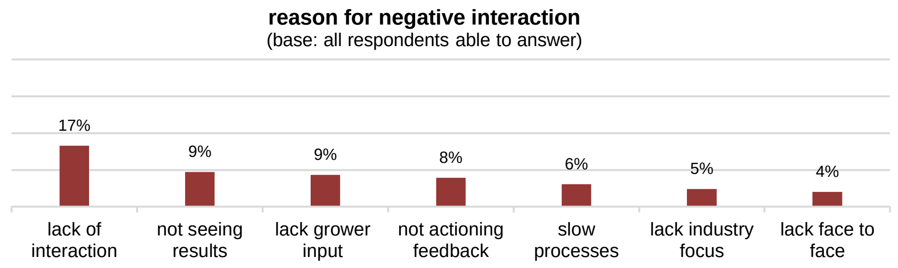


Figure 23

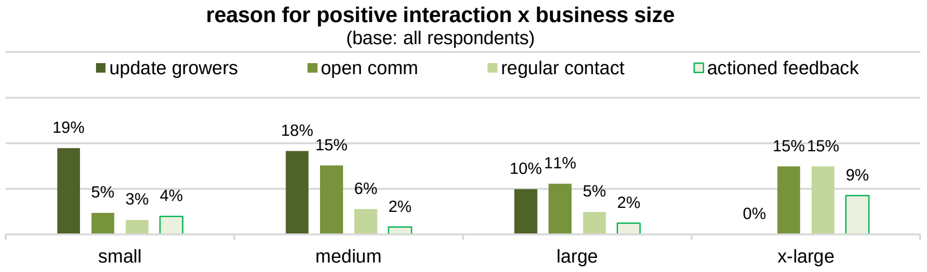
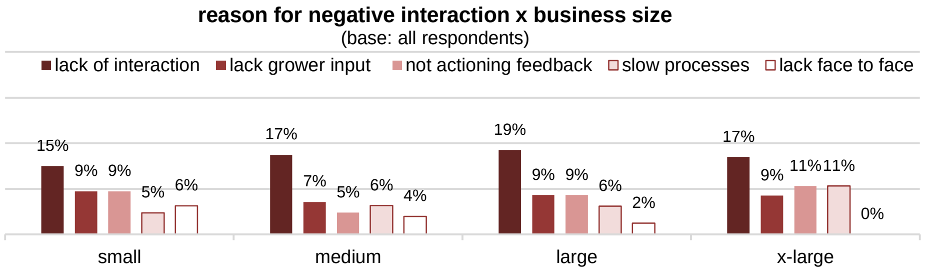


Figure 24



Notable results.

- Without prompting, the most commonly mentioned reasons for feeling satisfied with interaction include being kept informed/updated, having open, good quality and regular interaction.
- Negative perceptions are typically associated with a lack of engagement, not seeing results or being provided the opportunity to provide input and feeling feedback is not actioned.
- Of note, respondents interacting through the SIAP are significantly more likely to mention having open communication (21%) than those not engaged (7%), however an arguably large proportion of this group believe feedback is not being actioned (16%) and/or mention slow, complicated processes for engagement (15%).
- Similarly, respondents from x-large enterprises are the most likely to say they have regular (15%), open communication (15%) and to say feedback was actioned (9%). However they are also the most likely to say feedback is not being actioned (11%) and 10% mention slow, complicated processes.
- Notably, 43% of non-members say they desire more interaction with Hort Innovation.

Implications

The importance of Hort Innovation continuing to interact directly with growers as well as providing opportunities for open communication and feedback is highlighted in survey results.

Although the sample size of non-members is too small to draw definite conclusions, it does seem that attempts to interact with this group may be welcomed.

7. Information products and services

7.1 Information products and services accessed

Questions asked: *Q10. Which of the following Hort Innovation information products and services have you read, accessed or visited over the past 2 years?*

product/service accessed	**% mentioning** (base: all respondents)								
		sample		**primary industry cluster**					
	total (n=400)	**Hort member (n=375)**	**non member* (n=25)**	**vegetable (n=87)**	**temp fruit (n=116)**	**trop fruit (n=73)**	**lifestyle/ mush (n=69)**	**nut (n=34)**	**berry* (n=19)**
Growing Innovation	72%	76%	12%	71%	68%	77%	71%	76%	68%
Hortlink	62%	65%	16%	61%	59%	68%	65%	56%	53%
Hort Innovation website	46%	49%	4%	47%	50%	42%	43%	50%	37%
Grower Intel industry alerts	42%	44%	12%	49%	39%	48%	35%	38%	37%
Hort Innovation social media/twitter/etc	13%	13%	8%	14%	14%	14%	12%	6%	16%
Annual Hort report/other Hort Innov pubs	5%	5%	0%	2%	5%	7%	4%	12%	0%
IRB publications✝	33%	34%	20%	24%	34%	37%	35%	53%	16%
Non IRB publications	5%	5%	0%	6%	3%	1%	9%	0%	5%
None	7%	5%	52%	5%	6%	5%	12%	6%	11%

*Caution small sub sample ✝Nominated via 'other mentions'. Published by the IRB, but likely with significant Hort Innovation funding

Figure 25

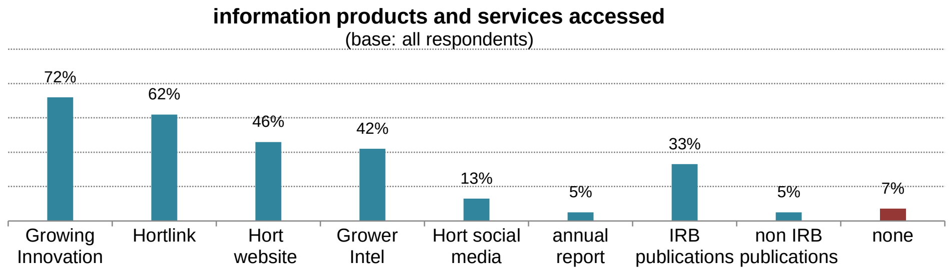


Figure 26

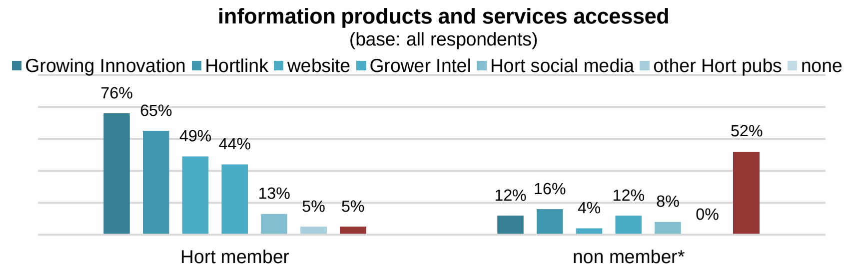


Figure 27

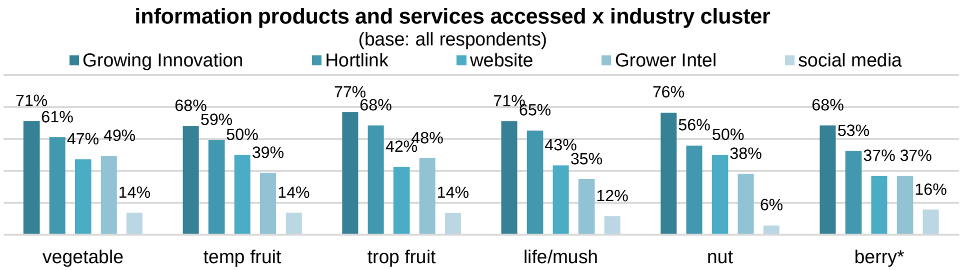
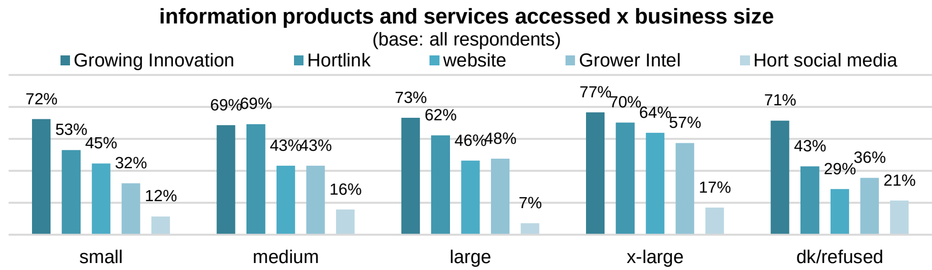


Figure 28



Notable results.

- On average, respondents have accessed between 2 and 3 Hort Innovation products and services, most commonly *Growing Innovation* e-newsletters (72%) and *Hortlink* (62%), but almost half have accessed the website (46%) and/or *Grower Intel* alerts (42%).
- As expected, members are more likely than non-members to have accessed each product and service. Likewise, a higher proportion of respondents from x-large businesses than those from smaller enterprises have accessed each product and service.
- While only 13% of all respondents accessed Hort Innovation social media, 24% of younger growers (less than 40 years of age) did so and 16% of those aged 40-59 compared to a significantly lower 5% over 60 years old.
- Notably, no other significant differences exist in the proportion of respondents accessing products and services by age group.
- Of note, more than one third (36%) of non-member respondents have accessed at least 1 of Hort Innovations products and services and a further 20% accessed other industry publications.

Implications

In a good result, the majority of respondents have accessed at least one of Hort Innovation's information products and services. *Growing Innovation* and *Hortlink* have widespread readership across respondents from each of the horticulture industries and while social media is used by fewer respondents it does have appeal for a segment of younger growers.

It will (of course) be important to track readership levels over the coming years to identify changes in the types of media accessed by different segments.

7.2 Satisfaction with information products and services

Questions asked: *Q11. Overall how satisfied are you with Hort Innovation's information products and services?*

rating of information products/services	% mentioning (base: respondents able to answer)									
		membership		primary industry cluster						
	total (n=393)	Hort member (n=371)	non member* (n=22)	vegetable (n=85)	temp fruit (n=114)	trop fruit (n=73)	lifestyle/ mush (n=67)	nut (n=34)	berry* (n=18)
Very satisfied	10%	10%	9%	14%	11%	14%	3%	6%	11%
Fairly satisfied	59%	60%	41%	54%	64%	52%	58%	62%	72%
Not too satisfied	19%	19%	27%	26%	14%	19%	24%	15%	17%
Not satisfied at all	11%	11%	23%	6%	11%	15%	15%	18%	0%
Total: satisfied	69%	70%	50%	68%	75%	66%	61%	68%	83%
Total: not satisfied	31%	30%	50%	32%	25%	34%	39%	32%	17%

*Caution small sub sample

Figure 29

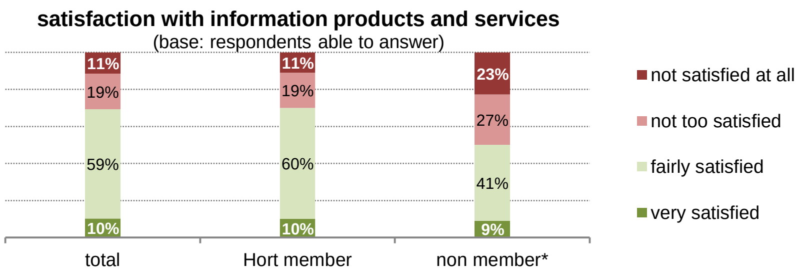


Figure 30

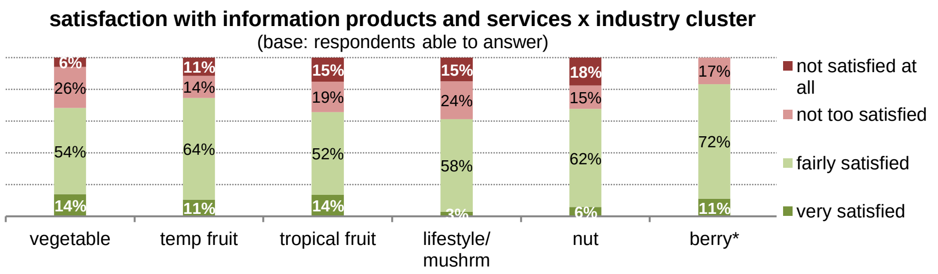


Figure 31

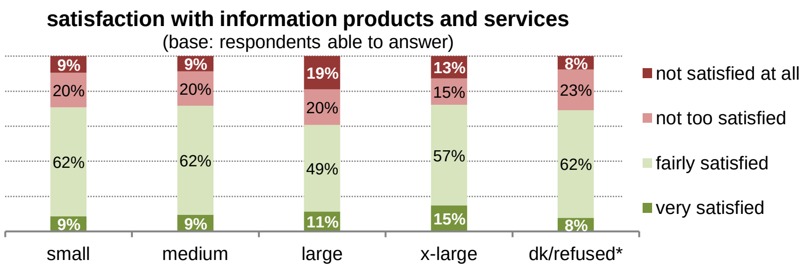
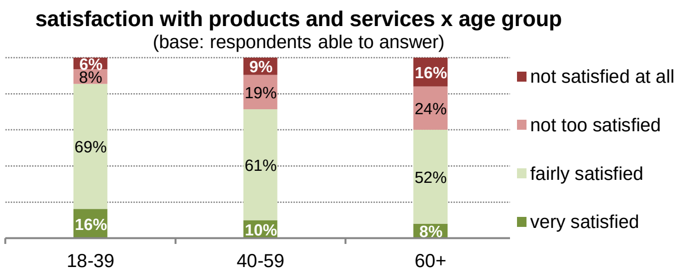


Figure 32



Notable results.

- While, 69% of respondents able to comment are satisfied overall with Hort Innovation's information products and services, only 10% are *very* satisfied.
- As well as being more likely to access Hort Innovation's products and services, satisfaction is more common among members (70%) than non-members (50%).
- Notably, 85% of respondents aged 18-39 are satisfied with Hort Innovation's products and services, compared to a considerably lower 72% aged 40-59 and 60% 60+.
- There is no significant variation in satisfaction with the organisation's information products and services by business size.
- The proportion of respondents *very* satisfied however, ranges considerably by industry cluster, from 14% of vegetable and tropical fruit respondents to 3% of lifestyle/mushroom growers.

Implications

Encouragingly, satisfaction with Hort Innovation's information products and services is fairly high, but room for improvement exists.

The following section of this report reveals there is some demand for more industry specific information and if this is provided, satisfaction levels will increase.

7.3 Reason for rating information products and services

Questions asked: *Q12. Why do you say that (from Q11)?*

reason for rating products and services	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=393)	Hort member (n=371)	non member* (n=22)	vegetable (n=85)	temp fruit (n=114)	trop fruit (n=73)	lifestyle/ mush (n=67)	nut (n=34)	berry* (n=18)
Positive mentions									
Regular/appropriate amount of information provided	28%	29%	14%	25%	27%	34%	24%	29%	44%
Relevant information/addressing industry issues	17%	17%	5%	22%	15%	22%	15%	0%	11%
Keep growers up to date with what is happening	7%	8%	0%	8%	9%	7%	3%	6%	11%
Multiple media avenues used/good range of prods/services	4%	4%	0%	6%	4%	1%	1%	3%	6%
Website useful	2%	2%	0%	2%	4%	3%	0%	3%	0%
Ease of accessing/finding information	2%	2%	0%	5%	2%	0%	3%	0%	0%
Other positive mentions	3%	3%	9%	4%	4%	3%	1%	6%	0%
Negative mentions									
Require more industry specific information	15%	15%	5%	11%	9%	15%	19%	29%	22%
Don’t know products existed/haven’t received anything	8%	5%	59%	6%	9%	4%	15%	6%	0%
Lack of relevant information	5%	5%	0%	5%	4%	4%	9%	6%	0%
Require greater focus on extension of results	5%	5%	5%	9%	6%	0%	0%	9%	6%
Don’t have time to access	5%	5%	5%	6%	5%	5%	3%	3%	6%
Prefer industry body information/extended through IRB	4%	4%	0%	2%	3%	7%	3%	3%	6%
Prefer face to face contact	4%	4%	0%	4%	4%	4%	1%	6%	0%
Difficulty accessing information	4%	4%	0%	6%	3%	4%	3%	0%	6%
Prefer transparency/greater clarity on research investments	3%	3%	0%	1%	4%	4%	3%	3%	0%
Lack of reaction to emerging issues/no benefits	3%	3%	5%	4%	2%	1%	4%	3%	6%
Prefer more practical information/summarised information	2%	2%	0%	4%	4%	1%	1%	0%	0%

*Caution small sub sample

Figure 33

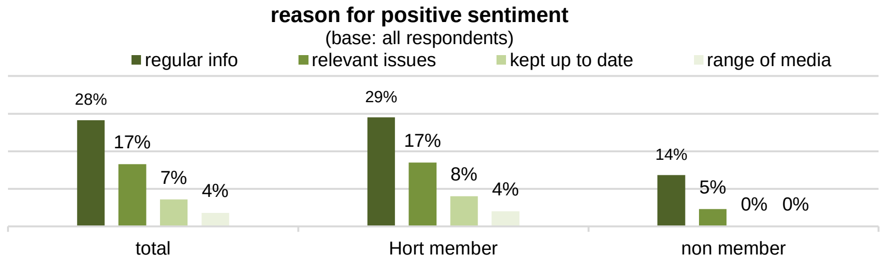
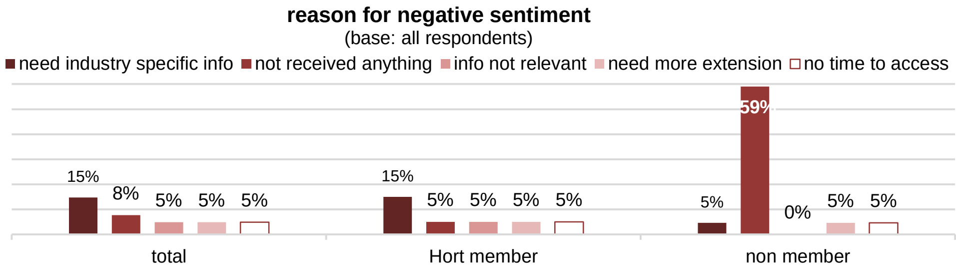


Figure 34



Notable results.

- Receipt of regular information (28%) with content addressing relevant industry issues (17%) are key drivers for satisfaction with Hort Innovation's information products and services.
- Dissatisfaction is typically due to a perception that industry specific information is lacking (15%) and is most evident among respondents in the nut (29%) and lifestyle/mushroom (19%) categories.
- Of note, younger growers are considerably more likely than other age groups to be satisfied with Hort Innovation's information products and services and this group is the most likely to mention receiving information regularly as well as believing content is addressing relevant issues.
- Respondents from large business (10%) are significantly more likely to desire greater face to face contact than small, medium and x-large (each 2%) counterparts.
- Growers aged 60+ are significantly less likely than other age groups to rate Hort Innovation highly due to receiving regular information, whereas 21% are unsatisfied due to not receiving industry specific information, compared to a much lower 11% of those aged 40-59 and 18-39.

Implications

A large proportion of growers perceive that Hort Innovation's information products and services are sent with appropriate frequency and contain content addressing relevant issues. However there is evidence to suggest that some growers, particularly those from nut and lifestyle/mushroom industries would benefit from more industry specific information.

8. Direct benefits felt from horticulture industry Research Development Extension or Marketing (RDE or M)

Question asked: *Q16. Do you feel you have directly benefited from any research, development, extension or marketing activities over the past 5 years?*
Q17. Did Hort Innovation play a role in achieving any of these direct benefits from RDE or marketing?

direct benefit felt/Hort Innovation role	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Yes	60%	62%	28%	51%	67%	65%	51%	76%	47%
No	35%	32%	64%	43%	30%	29%	43%	24%	42%
Not sure	5%	5%	8%	7%	3%	5%	6%	0%	11%
Hort Innovation had **significant** role in benefit	22%	23%	8%	16%	23%	27%	20%	26%	26%
Hort Innovation had **minor** role in benefit	18%	19%	4%	16%	21%	20%	16%	24%	0%
Hort Innovation had **no** role	9%	10%	4%	7%	6%	12%	7%	18%	21%
Unsure/can't say Hort Innovation's role	11%	11%	12%	11%	17%	7%	7%	9%	0%
Total: Hort Innovation had role in benefit	40%	42%	12%	32%	44%	47%	36%	50%	26%

*Caution small sub sample   errors due to rounding

Figure 35

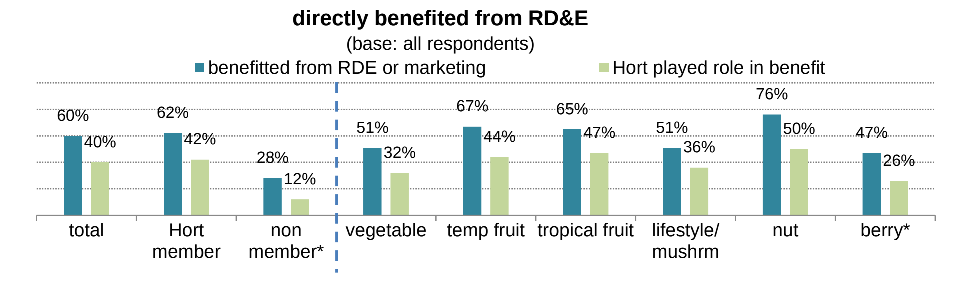


Figure 36

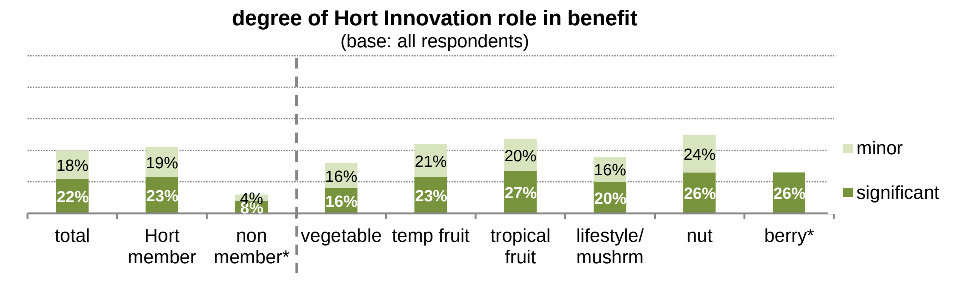


Figure 37

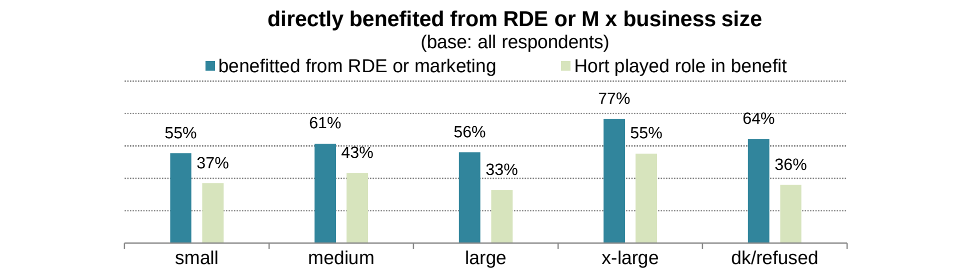
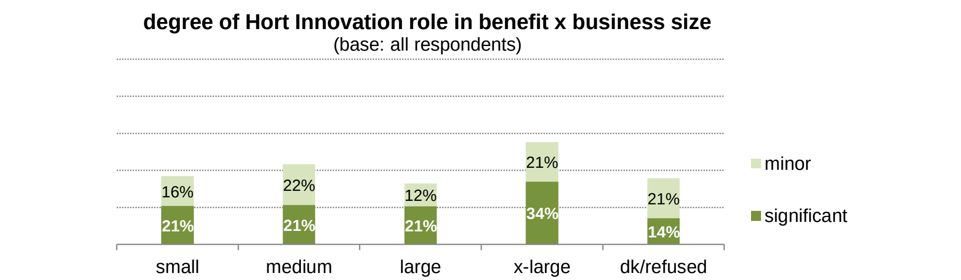


Figure 38



Notable results.	**Implications**
◆ In total, 60% of respondents feel they have directly benefitted from horticulture industry RDE or M and 67% of this group (equates to 40% of all respondents) perceive Hort Innovation played a role in these benefits. ◆ Hort Innovation members are considerably more likely to believe they have benefitted from RDE or M (62%) and nominate a role to Hort Innovation (42%) than non-members (28% and 12% respectively). ◆ Similarly, the proportion benefitting from RDE or M varies considerably by industry cluster, from 76% among the nut industries to 51% of vegetable and lifestyle/mushroom growers and industry size, from 77% of x-large businesses to 55% of small counterparts. ◆ Likewise, the proportion of all respondents attributing RDE or M benefits to Hort Innovation varies from 50% among nut growers to 26% among berry growers and 55% of x-large businesses to 33% of large and 37% of small counterparts. ◆ 86% of respondents interacting with the SIAP feel they benefitted from RDE or M compared to 52% not interacting and 71% say Hort Innovation played a role, compared to 30% not engaging with the SIAP.	Hort Innovation is perceived to have played a role in RDE or M benefits for less than half of all respondents, survey results suggest a focus on short term R&D and marketing activities may be opportunities to improve this perception. This metric will be important to monitor in future surveys and DTER recommends investigating whether growers are unaware of RDE or M efforts and outcomes or whether there is an opportunity to fund research in other areas and/or to alter marketing strategies.

9. Satisfaction with RD&M investment

9.1 Rating short term research and development

Questions asked: *Q13. In your opinion, how would you rate Hort Innovations investments for your SHORT term gains?*

rating of short term R&D investment	% mentioning (base: respondents aware Hort activities and able to answer)								
		membership		primary industry cluster					
	total (n=298)	Hort member (n=285)	non member* (n=13)	vegetable (n=66)	temp fruit (n=88)	trop fruit (n=54)	lifestyle/ mush (n=48)	nut* (n=29)	berry* (n=19)
Very highly	7%	7%	0%	8%	8%	7%	2%	3%	15%
Fairly highly	44%	44%	38%	35%	56%	41%	29%	55%	46%
Not too highly	27%	27%	15%	30%	23%	31%	31%	17%	15%
Not highly at all	23%	22%	46%	27%	14%	20%	38%	24%	23%
Total: highly	50%	51%	38%	42%	64%	48%	31%	59%	62%
Total: not highly	50%	49%	62%	58%	36%	52%	69%	41%	38%

*Caution small sub sample

Figure 39

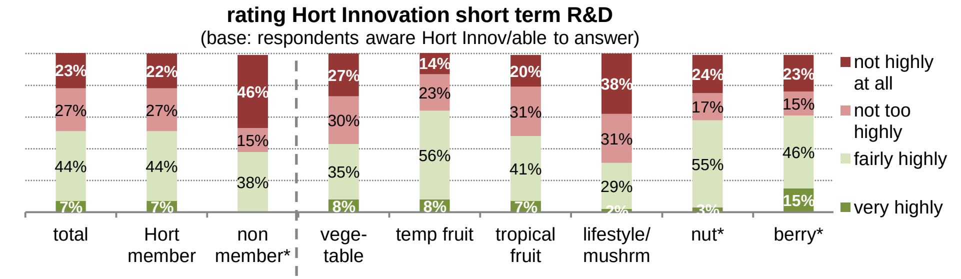
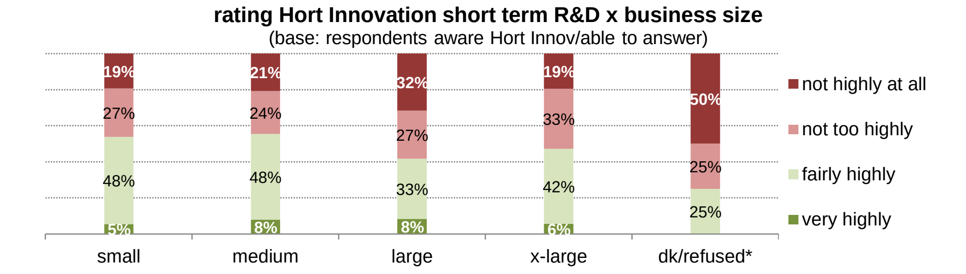


Figure 40



*Caution small sub sample

Notable results.

- Among respondents with at least a little knowledge of Hort Innovation, half (50%) rate the organisation's investments in research for short term gains *fairly* (44%) or *very* (7%) highly.
- This proportion varies from 51% of members to 38% of non-members and by industry cluster, from a high 64% of temperate fruit respondents to 31% from lifestyle and mushroom. Of note, there are no significant differences by enterprise size or respondent age group.
- Similarly, respondents rating Hort Innovation's short term R&D highly are considerably more likely than those rating it not high to feel they have benefitted from RDE or M (83% and 47% respectively).
- 54% of respondents knowing a fair to considerable amount about Hort Innovation activities rate short term investments highly compared to a considerably lower 37% of those knowing small to little.
- Notably, short term investments are rated highly by a significantly lower proportion of respondents than longer term industry R&D.

Implications

Hort Innovation's investments in R&D for short term gains are rated highly by an arguably small proportion of respondents and notably, this result is considerably lower than for long term R&D.

This is an important area for Hort Innovation to focus on, particularly as rating short term R&D highly is strongly linked to growers perceiving they have benefitted from RDE or M.

9.2 Rating long term research and development for the horticulture industry

Questions asked: *Q14. In your opinion, how highly would you rate Hort Innovations investments for the LONG term benefit of the horticulture INDUSTRY?*

rating of long term R&D investment	% mentioning (base: respondents aware Hort activities and able to answer)								
		membership		primary industry cluster					
	total (n=309)	Hort member (n=296)	non member* (n=13)	vegetable (n=71)	temp fruit (n=88)	trop fruit (n=55)	lifestyle/ mush (n=50)	nut (n=27)	berry* (n=17)
Very highly	15%	15%	0%	11%	16%	18%	14%	15%	12%
Fairly highly	52%	52%	62%	55%	58%	44%	46%	41%	71%
Not too highly	22%	22%	15%	27%	16%	25%	20%	30%	12%
Not highly at all	12%	11%	23%	7%	10%	13%	20%	15%	6%
Total: highly	67%	67%	62%	66%	74%	62%	60%	56%	82%
Total: not highly	33%	33%	38%	34%	26%	38%	40%	44%	18%

*Caution small sub sample

Figure 41

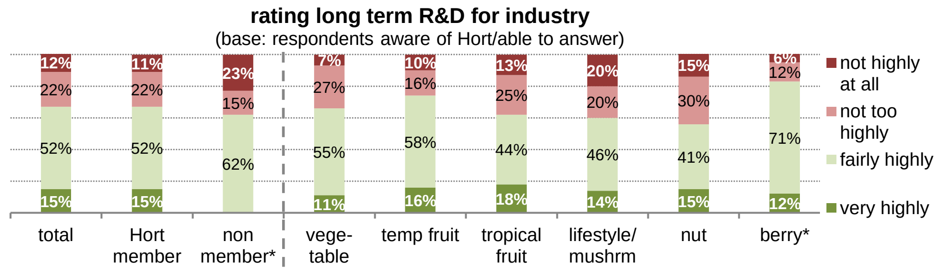
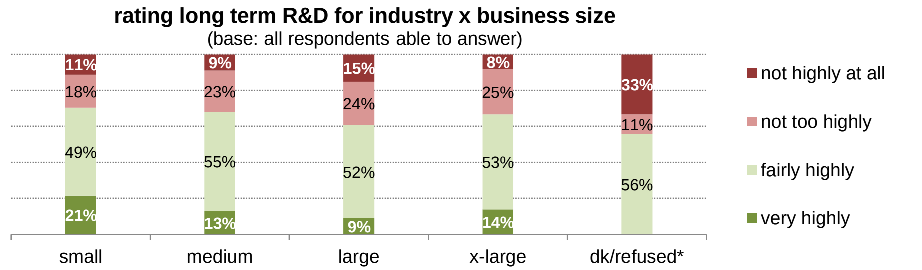


Figure 42



Notable results.

- Hort Innovation's investment in long term R&D for the horticulture industry is rated highly by two thirds (67%) of respondents who know at least a little about the organisation, however only 15% of this group rate it *very* highly.
- Interestingly, there is no significant variation in the proportion rating long term investments highly by member and non-member, industry cluster or enterprise size.
- Notably, respondents are significantly more likely to rate long term investments highly than both short term R&D and marketing. This result is reflected among respondents from the following segments:
  - Hort Innovation members
  - Vegetable, lifestyle/mushroom and nut growers
  - Small and large businesses

Implications

Long term investment in R&D for the horticulture industry is rated highly by a considerably greater proportion of respondents than short term R&D and marketing.

In future it may be worthwhile exploring reasons for rating long term research more highly than other investment areas.

9.3 Rating of Hort Innovation marketing activities and investments

Questions asked: *Q15. In your opinion, how highly would you rate Hort Innovations marketing activities and investments?*

rating of marketing activities/investment	% mentioning (base: respondents aware Hort activities/able to answer/pay marketing levy)								
		membership		primary industry cluster					
	total (n=244)	Hort member (n=233)	non member* (n=11)	vegetable† (n=8)	temp fruit (n=90)	trop fruit (n=59)	lifestyle/ mush (n=54)	nut* (n=23)	berry* (n=10)
Very highly	12%	13%	0%	0%	8%	21%	13%	13%	10%
Fairly highly	36%	37%	27%	50%	43%	33%	37%	22%	20%
Not too highly	31%	31%	45%	50%	27%	29%	24%	43%	60%
Not highly at all	20%	20%	27%	0%	22%	17%	26%	22%	10%
Total: highly	49%	49%	27%	50%	51%	53%	50%	35%	30%
Total: not highly	51%	51%	73%	50%	49%	47%	50%	65%	70%

*Caution small sub sample †Includes marketing levy paying respondents from potato/onion/sweet potato industries

Figure 43

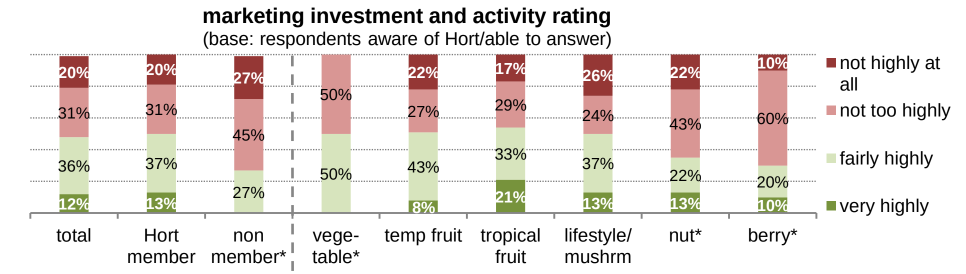
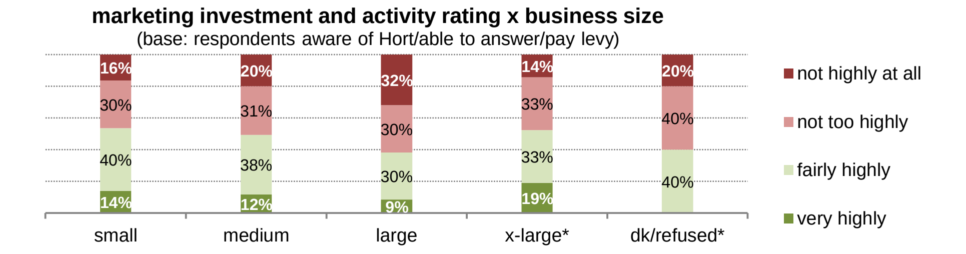


Figure 44



Notable results.

- Among respondents from industries paying the marketing levy, 49% rate Hort Innovation's marketing activities and investments either *very* (12%) or *fairly* (36%) highly. Notably, this proportion is significantly lower than those rating Hort Innovations long term research highly (69%).
- Although sample sizes are too small to draw definite conclusions, rating marketing activities highly is slightly more common among temperate and tropical fruit growers than those from nuts and/or berries.
- Of note, respondents from large businesses are the most likely to rate Hort Innovation's marketing not highly (62%), including 32% rating it *not high at all.*

Implications

Survey results reveal growers are equally likely to be satisfied as dissatisfied with Hort Innovation's marketing activities and while this result is possibly influenced by perceived benefits from marketing, it may be worth exploring other reasons behind grower sentiment in future surveys.

10. Confidence in industry future

Questions asked: *Q24. Overall, how do you feel about the future of the (primary industry from Q1) industry?*

confidence level	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Very positive	28%	29%	20%	14%	23%	30%	42%	50%	21%
Fairly positive	51%	51%	48%	52%	53%	59%	39%	44%	47%
Fairly negative	11%	11%	20%	16%	12%	7%	10%	3%	21%
Very negative	4%	3%	8%	7%	6%	0%	3%	0%	0%
Neutral/unsure	7%	7%	4%	11%	5%	4%	6%	3%	11%
Total: positive	79%	79%	68%	66%	77%	89%	81%	94%	68%
Total: negative	15%	14%	28%	23%	18%	7%	13%	3%	21%

*Caution sub sample

Figure 45

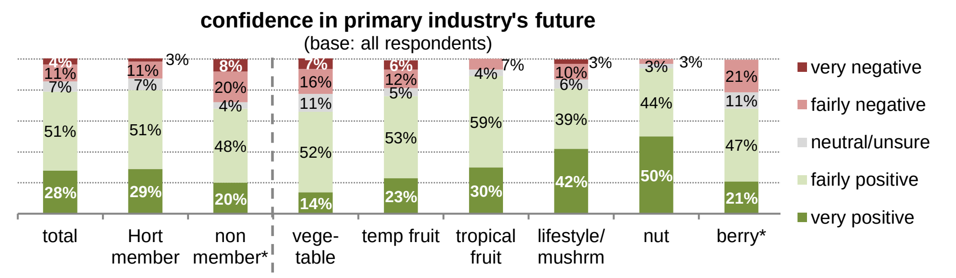


Figure 46

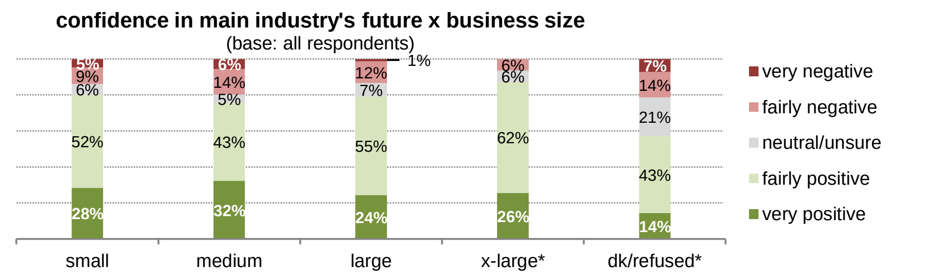
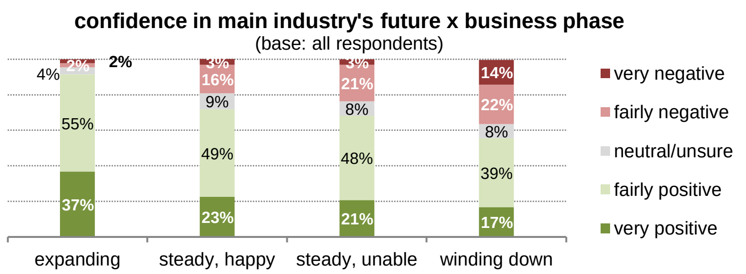


Figure 47



*Caution sub sample

Notable results.	**Implications**
◆ The majority of respondents (79%) view the future of their main industry either *very* (28%) or *fairly* (51%) positively. ◆ This proportion varies considerably however, from 94% among nut and 89% tropical fruit sectors to a significantly lower 66% among respondents from vegetable 68% from berry industries. ◆ A very high 92% of respondents expanding their enterprise are positive about their industry's future, compared a much lower 71% of those in a steady phase and 56% winding down. ◆ Similarly, 83% of growers satisfied with Hort Innovation's performance are confident in their industry's future compared to a significantly lower (but still arguably high) 74% of those not satisfied. ◆ Of note, despite x-large growers being slightly more positive, no statistically differences exist by business size. Additionally, there is no significant variation by age group.	Encouragingly, the majority of respondents are confident in the future of their main industry and results for this measure overall are similar to those recorded by DTER for other agricultural industries despite considerable variation evident by sector.

11. Overall satisfaction with Hort Innovation performance

11.1 Satisfaction with Hort Innovation performance

Question asked: Q18. How would you rate your overall satisfaction with Hort Innovation's role as investors in Horticultural research, development and extension?

rating of Hort Innovation's performance	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Very satisfied	6%	6%	4%	3%	9%	10%	1%	0%	11%
Fairly satisfied	47%	49%	20%	53%	52%	38%	42%	41%	47%
Not too satisfied	24%	23%	36%	22%	22%	26%	26%	32%	21%
Not satisfied at all	13%	13%	4%	13%	9%	18%	17%	12%	5%
Can't say	11%	9%	36%	9%	9%	8%	13%	15%	16%
Total: satisfied	53%	54%	24%	56%	60%	48%	43%	41%	58%
Total: not satisfied	37%	37%	40%	34%	30%	44%	43%	44%	26%

*Caution small sub sample

Figure 48

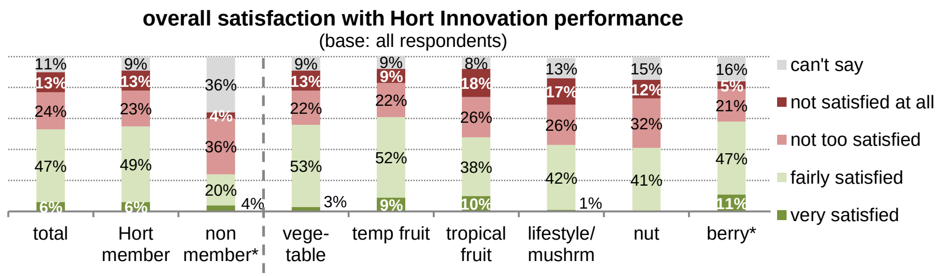


Figure 49

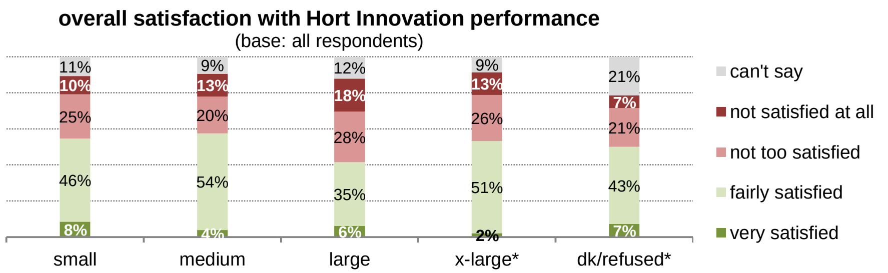
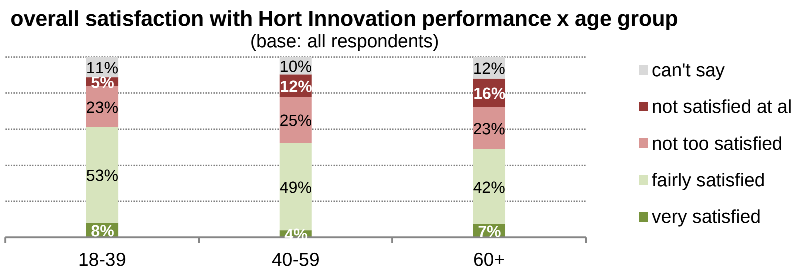


Figure 50



Notable results.

- Fifty three percent (53%) of all respondents are satisfied with Hort Innovation's overall performance and only 6% of this group are *very* satisfied.
- Of note, overall satisfaction varies from 54% of Hort members to a much lower 24% among non-members.
- Similarly, growers from temperate fruit industries (60%) are significantly more likely to be satisfied than counterparts from nut (41%) and lifestyle/mushroom (43%) industries.
- Interestingly, respondents from medium (57%), small (55%) and x-large (53%) businesses are slightly more likely to be satisfied with Hort Innovation's performance than large (41%) counterparts.
- Overall satisfaction with Hort Innovation's performance correlates strongly with the following metrics:
  - Rating marketing activities highly
  - Rating short term R&D highly
  - Belief Hort innovation played a role in RDE or M benefits
  - Rating long term R&D for industry highly
  - Satisfaction with interaction
  - Satisfaction with information products and services
  - knowing a fair to considerable amount about Hort Innovation activities

Implications

Although half the survey respondents are satisfied with Hort Innovation's overall performance, there is clearly room to improve, particularly among growers from the nut and lifestyle/mushroom industries.

The following section of this report highlights opportunities for Hort Innovation to improve communication and interaction as well as creating greater awareness of research and marketing achievements.

11.2 Reasons for satisfaction with Hort Innovation performance

Question asked: Q19. Why do you say that (from Q18)?

reason for rating of Hort Innovation's performance	% mentioning (base: all respondents)								
		membership		primary industry cluster					
	total (n=400)	Hort member (n=375)	non member* (n=25)	vegetable (n=87)	temp fruit (n=116)	trop fruit (n=73)	lifestyle/ mush (n=69)	nut (n=34)	berry* (n=19)
Positive mentions									
Satisfied with research/investment priorities	11%	12%	0%	20%	7%	10%	7%	12%	21%
Coordinate research/marketing/representation of industry	11%	11%	8%	11%	13%	14%	9%	3%	16%
Benefitted from research/programs	8%	8%	4%	7%	12%	3%	9%	9%	5%
Satisfied with information provided	6%	5%	12%	6%	10%	3%	4%	0%	5%
Total: Benefitted from marketing	6%	6%	8%	0%	10%	7%	3%	9%	5%
Satisfied with marketing/effective marketing	4%	4%	4%	0%	6%	7%	3%	6%	0%
Benefitted from export marketing/markets opening	2%	2%	4%	0%	6%	0%	0%	3%	5%
Good collaboration/communication with growers	3%	3%	0%	3%	3%	3%	3%	0%	11%
Doing a good job/improving (nfi)	3%	3%	0%	2%	4%	4%	0%	0%	5%
Negative mentions									
Total: Greater collaboration with industry required	13%	13%	8%	14%	12%	21%	7%	15%	5%
Greater consultation with growers	12%	12%	8%	14%	10%	19%	6%	9%	5%
Greater collaboration with IRBs	3%	3%	0%	0%	3%	7%	3%	6%	0%
Not seeing benefits/results	11%	10%	32%	13%	6%	8%	20%	15%	11%
Require more industry specific info/activities	10%	10%	8%	6%	7%	18%	12%	9%	11%
Marketing has little impact/insufficient marketing	10%	10%	12%	7%	16%	8%	9%	3%	16%
Disagree with research/investment priorities	7%	7%	4%	6%	9%	11%	4%	3%	0%
Slow processes with research/programs/grants/etc	5%	6%	0%	6%	4%	3%	4%	18%	0%
Lack of extension	4%	3%	12%	5%	6%	5%	0%	0%	0%
Not supporting small/niche businesses	4%	5%	0%	6%	3%	0%	7%	3%	11%
DK enough about Hort to comment	8%	7%	28%	9%	7%	7%	12%	12%	0%

*Caution small sub sample

Figure 51

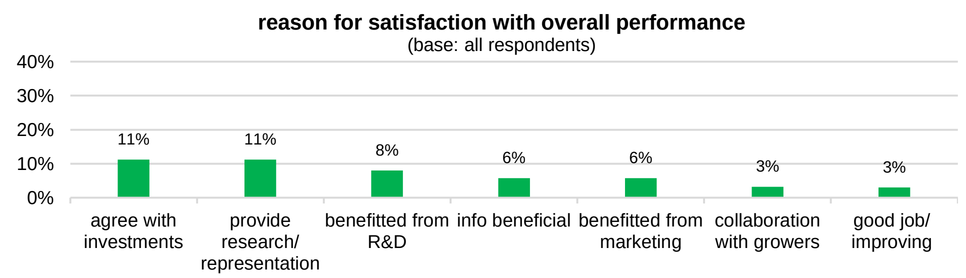


Figure 52

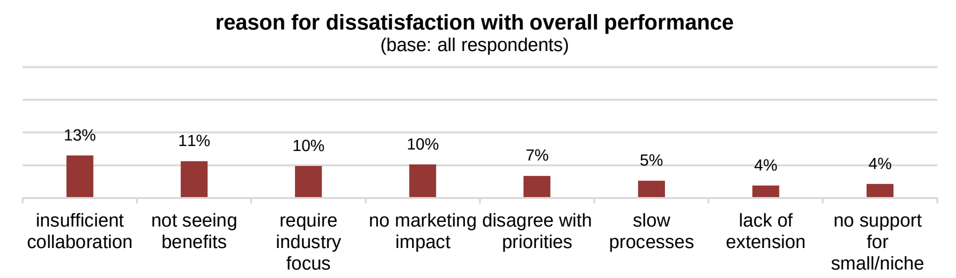


Figure 53

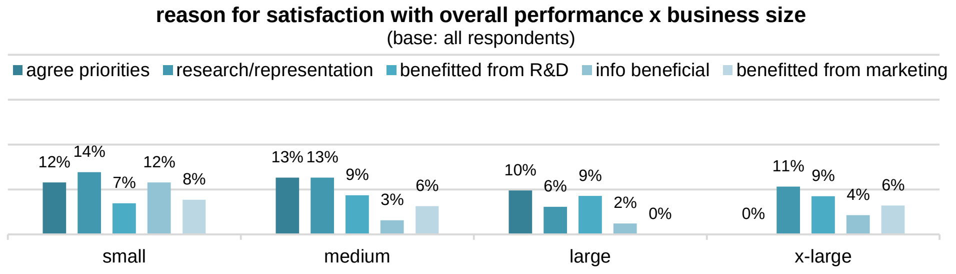
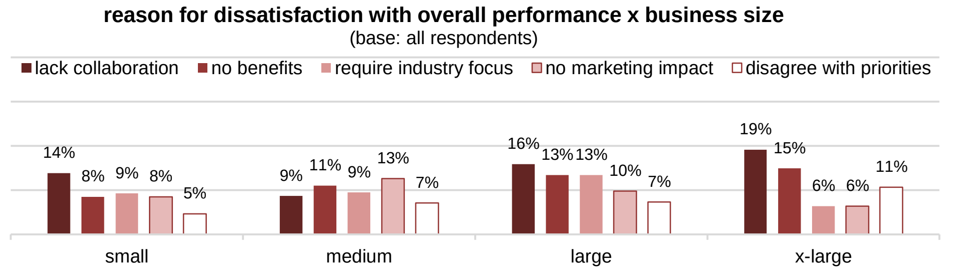


Figure 54



Notable results.

- Without prompting, key reasons for respondents to rate Hort Innovation's performance highly include agreement with research priorities, belief an organisation is required to coordinate research and marketing and/or benefits received from programs.
- Satisfaction due to agreement with priorities varies significantly by industry cluster, from 21% of berry and 20% vegetable to 7% of temperate fruit and lifestyle/mushroom growers.
- Dissatisfaction with Hort Innovation's performance is typically due to lack of collaboration with growers (12%), not seeing results/benefits (11%), preference for a more industry specific focus (10%) and/or not benefiting from marketing (10%).
- Of note, 21% of tropical fruit growers mention the need for greater collaboration compared to a much lower 5% of those from berry industries.
- X-large businesses are the most likely to mention slow processes with research/grants (19%) and lack of collaboration with growers (19%).
- Notably, respondents from nut industries are more likely to be dissatisfied than satisfied with Hort Innovation's performance. Slow processes with research (18%), belief they are not seeing results (15%) and/or require greater collaboration (15%) the most commonly mentioned reasons.
- Similarly, lifestyle/mushroom industries are equally as likely to be satisfied as dissatisfied, typically discontent is due to not seeing benefits (20%) and a more industry specific focus required (12%).

Implications

While a proportion of respondents are satisfied with Hort Innovation's performance due to agreeing with RD and M priorities or having benefitted from programs, others are seeking greater collaboration, a more focussed approach towards industry specific programs and information as well as more beneficial marketing. Ensuring growers are aware of any gains made in these latter areas should result in higher ratings for this measure in future.

Appendix: Computer Assisted Telephone Interviews questionnaire

Q1. To begin with, what is the main horticultural industry your business is involved in?

Q2. Is there any other horticultural products your business produces?

Q3. Could I please have the postcode of your main farm?

Q4. Does your business have farms in other postcodes?
- Yes -- 1
- No --- 2

If database = 1 (Hort grower member) then Q5 = automatically 1

Q5. Are you? *Read out*
- A current member of Hort Innovation--------------------- 1
- A lapsed member -- 2
- Never a member of Hort Innovation --------------------- 3

Q6. Prior to what was just explained, how much would you say you knew about what Hort Innovation actually does? *Read out, single response*
- A considerable amount ----------------------------------- 1
- A fair amount --- 2
- A small amount --- 3
- A very little amount -------------------------------------- 4
- Nothing at all -- 5

Q7. Over the past 2 years, have you interacted with Hort Innovation through any of the following methods?
- Face to face contact with your industry relationship manager, fund manager or other Hort Innovation staff -- 1
- Industry events, including workshops, field days, conferences etc funded by Hort Innov --- 2
- Industry events, including workshops, field days, conferences etc funded by someone else -- 3
- Through the SIAP (Strategic Investment Advisory Panels) --------------------- 4
- In any other ways? (other specify)--- 5
- Can't recall/don't know (DK) -- 6
- Have not found out anything over past year ----------------------------------- 7

Q8. Overall how satisfied are you with your interaction with Hort Innovation?
- Very satisfied -- 1
- Fairly satisfied --- 2
- Not too satisfied -- 3
- Not satisfied at all -- 4

Q9. Why do you say that (from Q8)

Q10. Which of the following Hort Innovation information products and services have you read, accessed or visited over the past 2 years? Have you…*Read out, rotate.*
- Read the quarterly industry update called Hortlink ---------------------------- 1
- Read the monthly e-newsletter called Growing Innovation -------------------- 2
- Received industry alerts on the 'latest' for specific commodities through *Grower Intel* --- 3
- Accessed Hort Innovation website - horticulture.com.au -----------------------4
- Accessed Hort Innovation social media/twitter/etc -----------------------------5
- Any other industry publications? (specify) -------------------------------------6
- None --- 7

Q11. Overall how satisfied are you with Hort Innovation's information products and services?
- Very satisfied --- 1
- Fairly satisfied -- 2
- Not too satisfied ---3
- Not satisfied at all --4

Q12. Why do you say that (from Q11)

Hort Innovation invests in short term research and development to improve productivity and profitability through improved pest and disease management, soil and water management, post-harvest practices and other activities.

Q13. In your opinion, how would you rate Hort Innovations investments for your SHORT term gains? *Read out…*
- Very highly -- 1
- Fairly highly --- 2
- Not too high -- 3
- Not high at all -- 4
- Can't say / don't know -- 5

Hort innovation also invests in longer term research and development through plant breeding, biotechnology, robotics, precision agriculture and other activities.

Q14. In your opinion, how highly would you rate Hort Innovations investments for the LONG term benefit of the horticulture INDUSTRY? *Read out…*
- Very highly -- 1
- Fairly highly --- 2
- Not too high -- 3
- Not high at all -- 4
- Can't say / don't know -- 5

If know something about Hort Innovation AND marketing levy paying industry:

Additionally, Hort Innovation aims to increase returns to growers through investing in domestic and export marketing campaigns and other activities encouraging people to buy, eat, grow and enjoy more horticultural products.

Q15. In your opinion, how highly would you rate Hort Innovations marketing activities and investments? *Read out…*

Very highly -- 1
Fairly highly -- 2
Not too high -- 3
Not high at all -- 4
Can't say / don't know --- 5

ASK all

Q16. Do you feel you have directly benefited from any research, development, extension or marketing activities over the past 5 years? *(interviewer note: this relates to any R&D undertaken in the industry, not just Hort Innovation activities)*

Yes -- 1 continue
No --- 2 go to Q18
Not sure --- 3 go to Q18

Q17. Did Hort Innovation play a role in achieving any of these direct benefits from RDE or marketing? *prompt to classify if yes*

Yes, a significant role -- 1
Yes, but a minor role -- 2
No --- 3
Not sure --- 4

Ask all

If NOT paying marketing levy

Q18. How would you rate your overall satisfaction with Hort Innovation's role as investors in Horticultural research, development and extension... *Read out*

Very satisfied -- 1
Fairly satisfied -- 2
Not too satisfied --- 3
Not satisfied at all -- 4
Can't say / don't know -- 5

If Paying marketing levy:

How would you rate your overall satisfaction with Hort Innovation's role as investors in Horticultural research, development extension and marketing... *Read out*

Very satisfied -- 1
Fairly satisfied -- 2
Not too satisfied --- 3
Not satisfied at all -- 4
Can't say / don't know -- 5

Q19. Why do you say that (from Q18)

Ask all

Lastly, I have a couple of questions about you and your enterprise and then we are finished.

Q20. How would you describe the phase your enterprise is currently in? Is it ... *Read out*

An expansion phase -- 1
A steady phase because it is pretty much where you want it to be ------------ 2
A steady phase because you are unable to expand at the moment ----------- 3
A winding down phase -- 4

Q21. Overall, how do you feel about the future of the (insert primary levy industry from Q1) industry? Would you say you feel … *(read out)*

Very positive --- 1
Fairly positive --- 2
Fairly negative -- 3
Very negative -- 4
Do not read Neutral -- 5
Do not read Unsure -- 6

Q22. And just for classification purposes, can you please tell me your age?

Q23. Also, just for classification purposes, can you please indicate your enterprise's turnover for the 2016-17 financial year? Was it?.... read out…

$200,000 or less -- 1
$200,000 to $500,000 -- 2
$500,001 to 1 million -- 3
1 million to 2 million -- 4
2 million to 3 million -- 5
3 million to 4 million -- 6
4 million to 5 million -- 7
5 million to 10 million--- 8
10 million to 20 million -- 9
Greater than 20 million --- 10

Q24. Record gender

Male -- 1
Female -- 2

Q25. Would you like someone from Hort Innovation to contact you to discuss anything about your industry?

Yes --- 1
No -- 2

Q26. If yes, check name and phone number of respondent.