

Grower and Partner Survey 2023



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.

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 2023

The Grower and Partner Survey 2023 was designed to:

- Measure key KPIs of the [Hort Innovation Strategy 2024-2026](#)
- Measure 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 participated in the Grower and Partner Survey 2023. They were:

Growers

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

Peak Industry Bodies

30 respondents (of 183 PIB representatives that were contacted)
49% of 35 PIBs completed the survey

Delivery partners

132 respondents (of 1,202 representatives that were contacted)
44% of 106 delivery partners completed the survey

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

Hort Innovation Grower and Partner Survey 2023

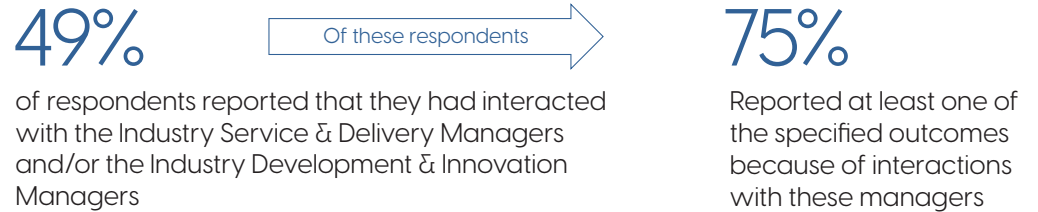
In focus: Growers

Participants: n = 401

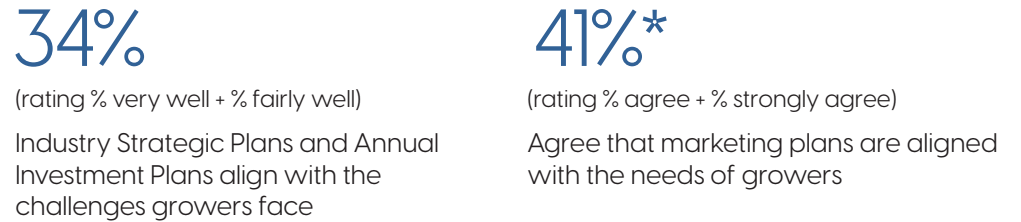
Industry outlook	+21	Nett sentiment (50% positive – 29% negative)
Grower engagement score	46%	Calculated measure of grower engagement based on grower perceptions of Hort Innovation across six specific attributes
Satisfaction with levy investment (rating % very satisfied + % satisfied)	37%	Satisfied that 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
	39%	Satisfied that Hort Innovation's long-term focused investments will deliver the outcomes the industry and growers need
Satisfaction with marketing and communications* (rating % very satisfied + % satisfied)	26%	Satisfied that marketing levies are delivering outcomes growers and the industry expect
	39%	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?

24% Have implemented changes	8% Plans in progress	16% Intend to make changes	12% No changes, no intention	40% 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.

61% of PIB respondents believed that growers were aware or very aware that levies invested by Hort Innovation contribute to communications projects for their industry.

Hort Innovation Grower and Partner Survey 2023

In focus: Peak Industry Bodies

Participants: n = 30

Industry outlook

+71

Nett sentiment
(79% positive – 8% negative)

Satisfaction with levy investment

(rating % very satisfied + % satisfied)

48%

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)

51%

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

44%

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

Satisfaction with marketing and communications*

(rating % very satisfied + % satisfied)

49%

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

34%

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



Engagement with Hort Innovation

(% rating very effective + % effective)

69%

Effectiveness of the engagement Hort Innovation has with their organisation

Alignment

87%

(rating % very well + % fairly well)

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

37%*

(rating % agree + % strongly agree)

Agree that marketing plans are aligned with the needs of growers

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 = 30)

77%

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

8%

Improved a lot

69%

Improved

3%

No change

8%

Declined

6%

Declined a lot

6% reported being unsure

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

Hort Innovation Grower and Partner Survey 2023

In focus: Delivery partners

Participants: n = 132

Engagement with Hort Innovation

(% rating very effective + % effective)

70% 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 is accessible
- Hort Innovation is relevant
- Hort Innovation follow up when required
- Hort Innovation is responsive

Where Hort Innovation rated lower

(ratings of 55% or lower for strongly agree/agree OR very satisfied/satisfied)

- Hort Innovation is easy to deal with
- Hort Innovation is transparent
- Hort Innovation is well planned
- Hort Innovation is consistent

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

35%

The effectiveness of Hort Innovation's engagement

Likelihood to recommend Hort Innovation

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

66% 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
- Hort Innovation's comms during the project are clear and easy to understand
- Frequency of Hort Innovation's comms during the project

Where Hort Innovation rated lower

(ratings of 47% or lower for very satisfied/satisfied)

- Hort Innovation's proposal and contracting processes are simple and straightforward
- Frequency of Hort Innovation's comms after the project
- Hort Innovation has realistic expectations about its role in extension

Next steps

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

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.

Demonstrate alignment between our impact and grower needs

Our investments and their results and impact could be more clearly explained in the context of the direct commercial benefit to growers, to make plain the alignment between grower needs and investments made to address those needs.

Boost understanding of Hort Innovation's role and the function of the levy

Growers are looking for greater clarity on the role of Hort Innovation in relation to our stewardship of the levy on their behalf. This lack of clarity may have contributed to lower levels of satisfaction, and sentiment, from growers who responded to the survey.

More support for smaller growers

Across several metrics, there is significant variation between our performance, reach and relevance for growers, depending on their size. We are more favourably perceived by large growers than by smaller enterprises.

Meet growers where growers are – building on our front-line engagement

The interactions with our industry service and delivery managers are seen as valuable with 75% of growers reporting at least one specified outcome because of these interactions. We will continue to build on direct contact with growers in the regions at forums, events and direct visits.

Reaching growers directly and in partnership

There are opportunities to better distinguish between levy-funded communications projects versus the largely multi-industry communications Hort Innovation delivers, and develop reach and stronger alignment in general.

Hort Innovation is making significant changes to the way it seeks advice, invests, communicates and turns up for its growers. The insights garnered from this survey, along with these positive changes, will contribute to the development of an engagement strategy, to be implemented in 2024.

We look forward to fostering even stronger connections and collaboration within our community.