

down to earth research

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Grains Research & Development Corporation Corporate Grower Survey Report April 2024

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GRAINS RESEARCH
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REPORT SENSITIVITY:

Does the report have any of the following sensitivities?

Intended for journal publication	NO
Results are incomplete	NO
Commercial/IP concerns	NO
Embargo date	NO

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Executive summary

Background

The Grains Research and Development Corporation (GRDC) conducts a regular grower survey to measure its performance as an investor and inform its research, development and extension (RD&E) activities. The survey is also used to monitor growers' changing attitudes, behaviours and practices. This report supports the grains industry to better serve growers by sharing robust data and insights.

State of the industry

Grower sentiment towards the industry appears to have reverted to pre-2022 levels, with more than half of all respondents believing the industry is in good to extremely good shape and a very high 9 in 10 saying it is in at least fair shape.

Respondents sowed a similar area of grain in 2024 (2023-24 season) to the amount reported in the 2022 survey (2021-22 season) but average harvests were significantly lower. Reported harvest in the GRDC southern region was the exception with significantly greater harvest, on average, than in 2022.

There has been an increase in the proportion of respondents perceiving RD&E to have impacted *optimising input costs* this year. More than 8 in 10 respondents perceive RD&E activities to have a major or moderate impact on improving yields. Approximately 6 in 10 respondents perceive RD&E to have a major or moderate impact on managing risk. However, in line with 2022, only one quarter of respondents believe RD&E activities designed to reduce post-farmgate costs have had a major or minor impact on the industry.

Belief the grains industry is well placed to assist growers in coping with ongoing changes in Australian grain markets, seasonal conditions and inputs, such as fertiliser costs or availability is polarised.

Corporate metrics and research, development and extension

GRDC continues to be rated highly in its role as investors in grains research by the majority of respondents.

On par with 2022, more than 8 in 10 (82%) respondents perceive to have directly benefitted from RD&E and more than 7 in 10 (73%) believe GRDC played a role in the benefit – the latter result is the equal highest since the survey first captured this data.

Since 2021, GRDC staff, Panel members and the National Grower Network (NGN) have discussed RD&E ideas with a growing proportion of respondents (now 53%) and over this period, belief that GRDC responded at least partially to the idea has trended upwards (now 85% of those discussing RD&E ideas with GRDC).

Farm Practices

In line with previous results, more than 9 in 10 growers have changed farming practices over the last 3 years and 61% of all respondents nominate either R&D outcomes (53%) and/or GRDC information (44%) as a stimulus for the changes made. Notably, since 2021 a growing proportion of respondents nominated GRDC information as a driver of change.

Profitability drivers, production risk management, seasonal conditions and input cost management are nominated as the stimuli for practice change by more than 6 in 10 growers.

The potential to sell grain to high-margin markets is influencing the type of crop grown (54%), variety decisions (55%) and/or management practices (56%) for more than half of all growers, but are more likely to be undertaken by larger growers than those running smaller operations.

Since 2022, confidence that research can respond quickly to biosecurity threats such as pests, weeds and diseases has dipped across each region, resulting in a significant decrease nationally (58%, was 67%). Confidence is significantly less widespread among northern growers than those in the west and south, and while outside the scope of the survey to capture, this result may be due in part, to the impact of fall armyworm and seasonal conditions.

Consistent with 2022, 9 in 10 growers receive advice from either paid (66%) and/or retail (64%) advisers and approximately half source information from grower groups.

1. Background, objectives, methodology and statistical notes

Background and objectives The Grains Research & Development Corporation (GRDC) grower survey has been conducted regularly since 1993 to measure trends across its key performance indicators (KPIs) and corporate measures as well as gathering data on a variety of aspects linked to the Corporation’s Research, Development and Extension Plan 2023-28.

The following concepts were included in the survey this year:

- farm and grower profile including production, perceived current state of the industry and sentiment towards its future
- corporate metrics including KPI data and feedback on GRDC’s products and services
- grower benefits from RD&E and GRDC’s role in the benefit
- perceived RD&E impact on key areas of the industry
- practice change and drivers to do so
- influence of potentially selling to high-margin markets on farm practice decision making
- confidence in the research industry’s ability to respond quickly to opportunities and threats
- use of paid and other sources of professional advice

Methodology Computer assisted telephone interviews (CATI) were conducted with 1200 grain growers across Australia. Respondents were selected randomly from GRDC’s database of growers who had opted in to be contacted for surveys. The randomisation process was computer driven, using specially designed software.

Quotas were set to ensure a robust sample was obtained in each agro-ecological zone (AEZ), allowing sound statistical conclusions to be drawn.

The sample in each location was weighted at computer stage to represent the true geographic distribution of grain growers and, consequently, national results are not disproportionately influenced by responses from zones with smaller concentrations of grain growers.

Table 1

	total	nsw central	nsw ne/ qld se	nsw nw/ qld sw	nsw vic slopes	vic high rainfall	qld central
# interviews	1,200	97	158	49	182	51	30
weighted to*	21,882	1842	2908	913	3470	999	527
	sa mid/ yorke/ eyre	sa/vic b'town/ wim	sa/vic mallee	wa central	wa eastern	wa northern	wa sand plain
# interviews	122	150	123	147	30	31	30
weighted to*	2061	2862	2236	2510	512	529	512

* Based on Australian Bureau of Statistics data.

Methodology continued...

Interviews completed by state and region:

Table 2

state	# interviews	region	# interviews
New South Wales	386	Northern	493
Victoria	255	Southern	469
Queensland	107	Western	238
South Australia	214		
Western Australia	238		

All interviews were conducted by MarketMetrics Data Collection in accordance with ISO 20252 standards. Interviewing was conducted during late mid-January to February 2022. The interviewers and team supervisors were briefed on all aspects of the project prior to fieldwork commencing.

This year's response rate 67%, is significantly higher than the last survey waves in 2022 (57%) and 2021 (63%) and provides a high level of confidence in results.

The sample of grain growers participating in the survey is 1,200. On typical measurements involving the entire sample (where 70% of respondents concur), the standard error at the 95% confidence level is approximately $\pm 2.5\%$. Readers should exercise caution however, when examining responses for small sub-samples highlighted with an *. The table below summarises the standard error at the 95% confidence level:

Table 3

sample base	margin for error
1,200 (entire sample)	$\pm 2.5\%$
493 (northern region results)	$\pm 3.9\%$
469 (southern region results)	$\pm 4.1\%$
238 (western region results)	$\pm 5.6\%$
200	$\pm 6.3\%$
100	$\pm 9.0\%$

Statistically significant differences



Statistical significance analyses whether variation in results either year on year or between segments in the survey is great enough to infer true change in the population, not the result of sampling error or chance.



Statistical significance follows rules of statistics and is based on p values computed by specialist market research software and the result based on the normal distribution curve. The software considers size of the effect, variation in the sample data, the sample size and identifies significant variation in results.

For example, when results have parity in opinion and a 2 point difference from 50% to 52% is noted, the result may not be statistically significant, but where almost all of the sample shares a similar result, the chance of error is much smaller and a 2 point shift from 95% to 97% is more meaningful and also statistically significant.

In this report, statistically significant differences at the 95% confidence level will be highlighted using the terminology *significant*. Where results may appear to be significant but are not, terminology such as *slight* is used.

Statistical comparisons made to segments within the 2024 dataset, for example, differences in results between northern, southern and western region respondents are analysed automatically with specialist market research software using Chi-Square testing at the 95% confidence interval.

Longitudinal statistical comparisons, for example, 2022 versus 2024 national results undergo either Chi-Square or z tests using specialist market research software to identify where shifts in data is unlikely to be the result of sampling error and can accurately be inferred to result from changes in the grower population - identified in Report tables with  or .

Where a result is not marked as significant ( or ) in data tables, the variation from 2022 results is not statistically significant and is within the survey's margin for error.

For example, if 85% of the entire sample of respondents are satisfied with GRDC's overall performance and the survey was repeated 100 times, in 95 out of 100 surveys, the result would fall between 82.5% and 87.5%

Standard error and limitations of the data

2. Definitions and report notes

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

Age group	Younger	Growers aged 18-39 years
	40-59	Growers aged 40-59
	60+	Growers aged 60 years or older
*	Caution small sample	Caution sample size smaller than n=30, data is indicative only
†	Longitudinal comparison unavailable	Comparison to past data unavailable due to question alteration in 2024
Production segment (tonnes produced)	<5,000 tonnes	Results are provided per production class – tonnes of all grain types produced last season
	5,000 to 9,999 tonnes	
	10,000 to 14,999 tonnes	
	15,000 to 24,999 tonnes	
	25,000+ tonnes	

Comparison of survey measures with previous years The last GRDC Grower Survey ran in 2022 during May and June. Due to some survey sections last being asked in 2022 and others being asked in previous years, comparison years may change throughout this report.

Sample bases Throughout this report, bases used for various measurements differ. Readers should note that bases are identified for all report sections, tabulations and charts.

Rounding error Throughout this report, there are instances where totals do not exactly match the addition of individual question components due to data rounding.

3. Grower profile

3.1 Crop area and tonnages harvested

Questions asked: S1. Taking all grains into account, how many hectares did you sow this season?

Q1. Taking all grains into account, approximately how many tonnes of grain did your farm business produce or expect to produce this season?

S2. If less than 200 hectares harvested, ask: Was the amount of hectares sown last season impacted by adverse weather conditions in any way at all?

Key findings The average area of crop sown by respondents continues to trend upwards and last season was the largest since the survey first captured this data in 2004 (2,531 hectares).

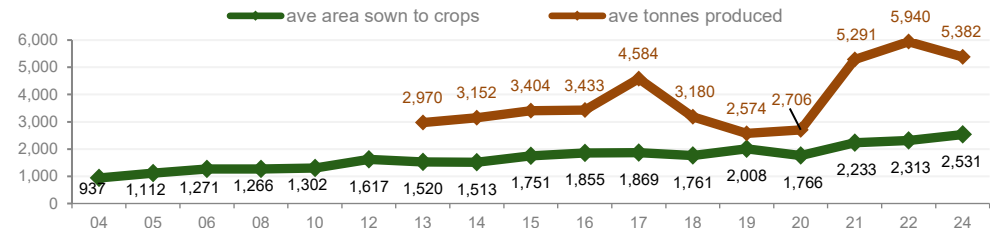
While this trend is reflected across western and southern regions, the average area sown by northern respondents dipped slightly compared to the 2021-22 season (captured in the last grower survey in 2022).

Despite an increased average area of crops sown nationally, respondent harvests (on average) were significantly lower than in the 2021-22 season (5,382, down from 5,940). However, this year's result remains higher than each other year that this data was collected (first captured in 2013).

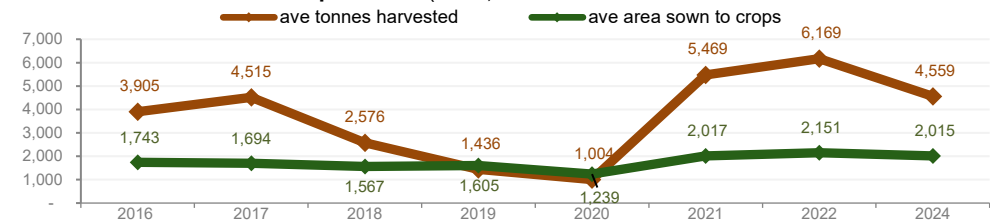
While compared to the 2021-22 season, northern and western respondents harvested a significantly lower amount of grain (on average), southern growers harvested a significantly greater amount.

On a national level, the crop areas sown have increased at approximately 5% annually since the survey first captured this metric.

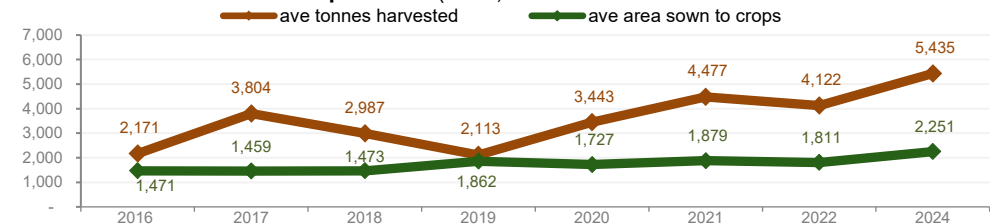
hectares sown to crops & tonnes produced (S1/Q1)



northern ha sown & tonnes produced (S1/Q1)



southern ha sown & tonnes produced (S1/Q1)



western ha sown & tonnes produced (S1/Q1)

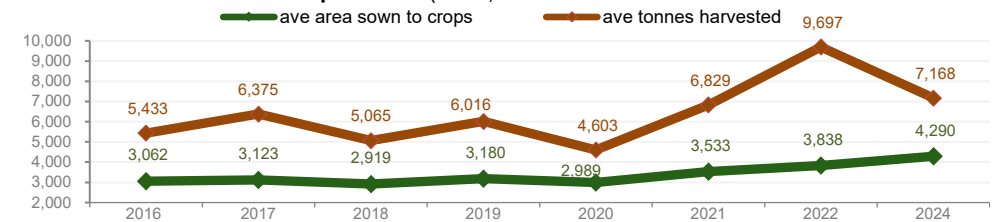


Table 5

crop area last season (S1) grain tonnage produced last season (Q1)	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000- 14,999 n=84	15,000- 24,999 n=65	25000+ n = 29*
Average area sown (hectares)	2,313	2,531	2,015	↑ 2,251	4,290	1,188	2,978	↑ 4,792	↑ 7,683	13,315
Median area sown (hectares)	1,416	1,500	1,030	↑ 1,500	2,800	830	2,500	↑ 4,000	↑ 6,000	11,500
Average crop harvested (tonnes)	5,940	5,382	↓ 4,559	↑ 5,435	↓ 7,168	1,992	6,722	11,193	17,701	33,697
Median crop harvested (tonnes)	3,500	3,500	↓ 2,500	↑ 4,000	↓ 4,849	1,800	6,500	11,000	17,000	31,000
% of respondent farms sowing less than 200 hectares due to adverse weather conditions	2%	3%	5%	1%	1%	4%	0%	0%	0%	0%

↑ statistically significant increase since 2022; ↓ statistically significant decrease since 2022 *Caution small sub sample

3.2 Grower mood towards industry

Questions asked:

Q25. Which of the following best describes how you feel about the current state of the Australian grains industry?

Q26. To what extent do you agree or disagree with the following statement: 'I am optimistic about the future of the Australian grains industry?'

Key findings Almost 9 in 10 growers nationally (88%, was 91% in 2022) perceive the industry to be in at least *fair shape*.

While belief the industry is in *extremely good to good shape* is significantly lower than in 2022 (53%, was 65% in 2022), it remains higher than most years before 2021. Notably, the 2022 result was the highest since the survey first captured this data in 2005.

Belief the industry is in *extremely good to good shape* varies from 60% of southern respondents to a significantly lower 51% in the west and 47% in the north.

Similarly, while approximately 1 in 10 (12%) respondents believe the industry is *under some threat*, this varies from 15% among northern and western region growers to 9% of those in the south.

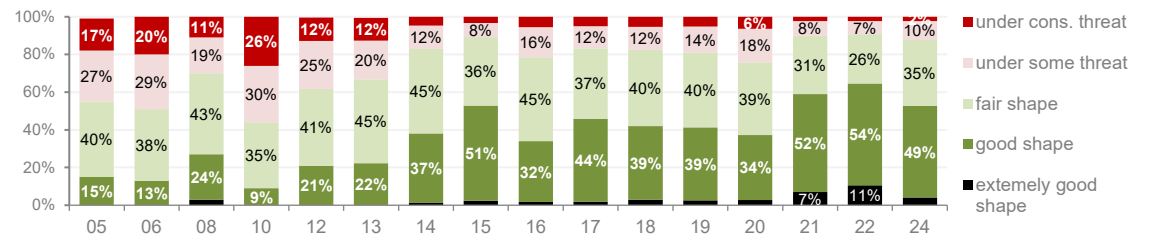
The proportion of respondents perceiving the industry to be under *considerable threat* is on par with the lowest result since the survey first captured this data in 2005.

When asked to rate their optimism about the future out of 10 points, on average, respondents rated their optimism 7.3, down significantly from the highest result on record in 2022 (7.7).

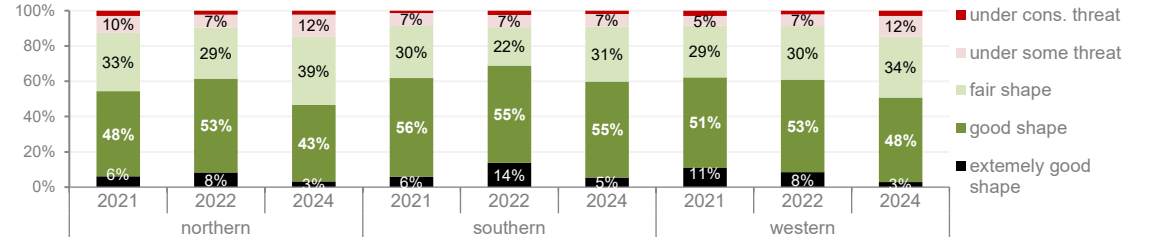
The dip in this result is reflected across each region, but remains higher among those producing greater than 5,000 tonnes of grain than those producing less.

Similarly, growers aged 18-49 rate their optimism towards the future of the industry significantly higher than their older counterparts (7.7 and 7.2 respectively).

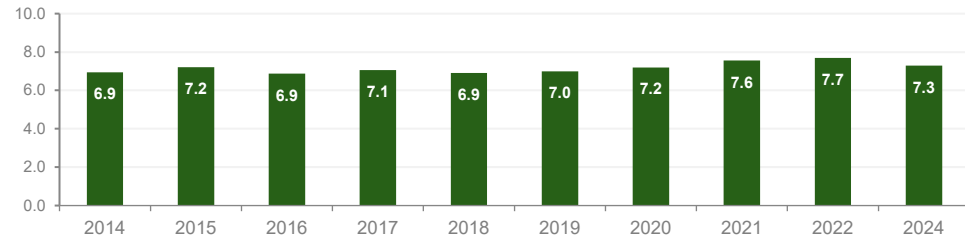
perception of the industry (base: all respondents; Q25)



perception of the industry by region (base: all respondents; Q25)



average rating on optimism about future (out of 10 points) (base: all respondents; Q26)



average optimism about future rating (out of 10 points) (base: all respondents; Q26)

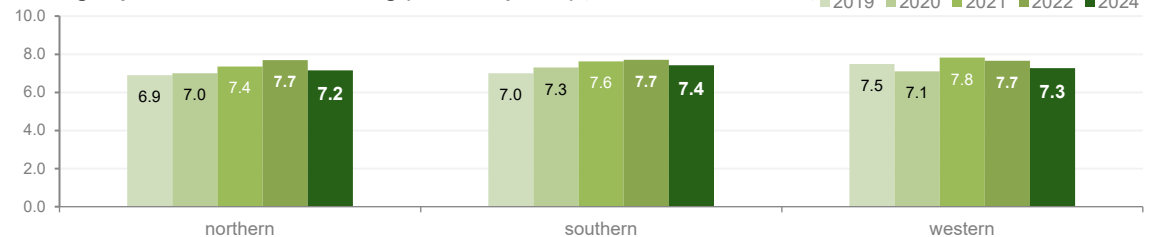


Table 6

mood about state of industry (Q25/Q26)	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Extremely good shape	11%	↓ 4%	↓ 3%	↓ 5%	↓ 3%	↓ 3%	↓ 6%	9%	8%	14%
Good shape	54%	↓ 49%	↓ 43%	55%	48%	↓ 45%	54%	53%	55%	42%
Fair shape, but likely to come under threat	26%	↑ 35%	↑ 39%	↑ 31%	34%	↑ 38%	32%	27%	31%	38%
Already under some threat	7%	↑ 10%	↑ 12%	7%	12%	↑ 12%	7%	5%	5%	6%
Already under considerable threat	2%	2%	2%	2%	3%	2%	1%	6%	1%	0%
Total: Extremely good/good shape	65%	↓ 53%	↓ 47%	↓ 60%	↓ 51%	↓ 48%	60%	62%	63%	56%
Total: Fair/good/extremely good shape	91%	↓ 88%	↓ 85%	91%	↓ 85%	↓ 85%	92%	89%	94%	94%
Total: Under some/considerable threat	9%	↑ 12%	↑ 15%	9%	↑ 15%	↑ 15%	8%	11%	6%	6%
Mean rating of the industry's future out of possible 10 points	7.7	↓ 7.3	↓ 7.2	↓ 7.4	↓ 7.3	↓ 7.1	7.8	↓ 7.6	7.6	7.7

↑ statistically significant increase since 2022; ↓ statistically significant decrease since 2022 * Caution small sub sample

3.3 Use of fee for service agronomic advice

Question asked:

Q17. Do you currently receive professional advice from any of the following people?

Key findings Similar to 2022 (68%), 66% of respondents rely on advice from paid advisers or agronomists. This proportion remains significantly higher than in years before 2022.

While use of a paid adviser/agronomist is widespread across each production size segment, it varies from 9 in 10 respondents producing greater than 15,000 tonnes of grain to a much lower 56% producing less than 5,000.

Use of a paid adviser has trended upwards since 2021 among southern and western region respondents, but a slight dip since 2022 is evident among northern growers.

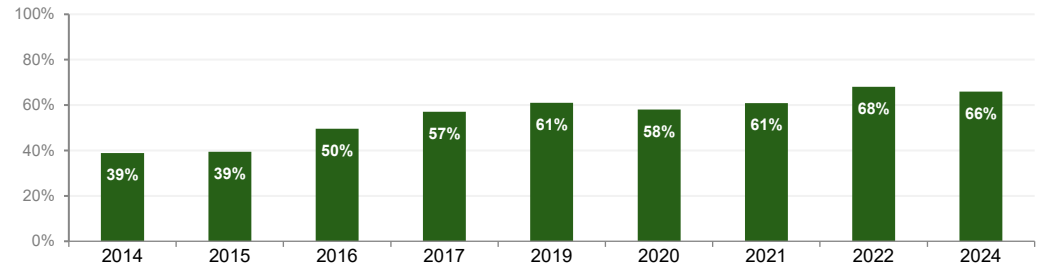
In total, 96% of respondents source advice from either a paid (66%) and/or retail (64%) adviser or agronomist.

For the first time, the 2024 survey captured the proportion of respondents receiving professional advice from grower groups and results suggest that grower groups are the third most commonly accessed source of professional advice (52% nationally).

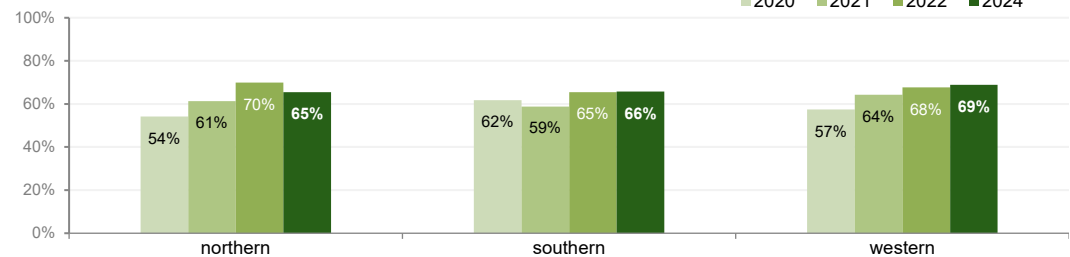
Notably, this practice varies significantly by region (63% in the west, 56% in the south and 43% among those in the north).

Compared to 2022, results suggest that a significantly higher proportion of respondents access precision ag specialists and data analysts.

receive paid advice from adviser/agronomist (base: all respondents; Q17)



receive paid advice from adviser/agronomist (base: all respondents; Q17)



source of professional advice (base: all respondents; Q17)

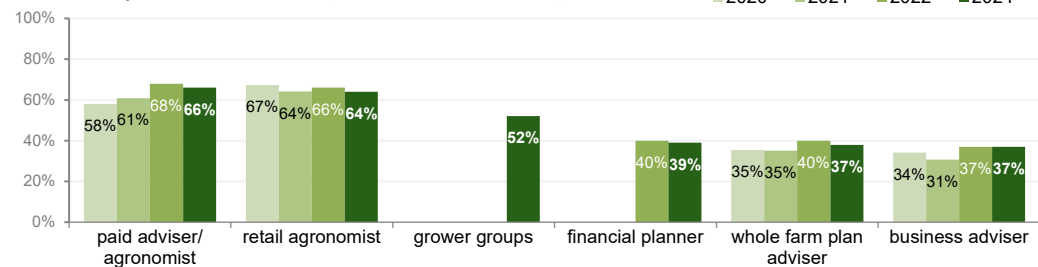


Table 7

source of professional advice (Q17)	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000- 14,999 n=84	15,000- 24,999 n=65	25000+ n = 29*
Fee for service agronomist or cropping adviser	68%	66%	65%	66%	69%	56%	77%	76%	86%	100%
Retail agronomist or cropping adviser providing a free service	66%	64%	60%	64%	76%	68%	57%	67%	63%	43%
Grower groups	Na	52%	43%	56%	63%	45%	64%	67%	66%	62%
Financial planner or farm financial adviser	40%	39%	è 30%	42%	55%	33%	41%	58%	54%	54%
Agronomic whole farm planning advice	40%	38%	31%	40%	50%	33%	40%	47%	57%	65%
A consultant giving business, marketing or NRM advice	37%	37%	31%	33%	57%	26%	47%	63%	59%	80%
Precision Agriculture consultant	6%	è 14%	è 13%	è 15%	è 15%	è 10%	è 18%	è 25%	è 24%	31%
Data analyst	3%	è 5%	5%	è 4%	6%	è 4%	4%	è 8%	6%	21%

↑ statistically significant increase since 2022;
 ↓ statistically significant decrease since 2022
 errors due to rounding
*Caution: small sub sample

4. Corporate measures and research, development and extension

4.1 Overall performance rating and satisfaction with GRDC

Questions asked: Q4. Overall, how would you rate the performance of the GRDC as investors in grains research?

Q6. On a scale of 1 to 10 where 1 = not satisfied at all and 10 = extremely satisfied, how would you rate your overall satisfaction with the GRDC's performance as investors in grains research?

Key findings GRDC's performance as investors in grains research continues to be rated *very* to *fairly highly* by the vast majority of respondents (84%, down slightly from 2022; 86%).

While this perception is reflected across more than 8 in 10 respondents from each region, it varies from 88% among those in the south to a significantly lower 82% among western and northern counterparts.

Rating GRDC's performance as investors in grains research *highly* has trended downwards since 2021 among northern growers, whereas an upward trend is evident over this period among those in the west. Compared to 2022, this result has dipped slightly (not statistically significant) among southern region growers.

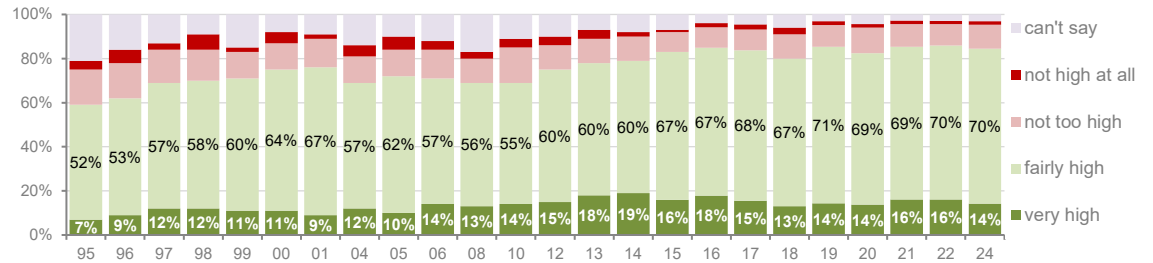
Rating GRDC's performance as investors in grains research *highly* varies among the following segments:

- Age group (94% of young growers to 81% aged 60+)
- Knowledge of GRDC's activities (87% know a *considerable amount* to 73% know a small to little amount)
- Perceive GRDC to play a role in RD&E benefits (88%, compared to 61% of those saying GRDC played no role)

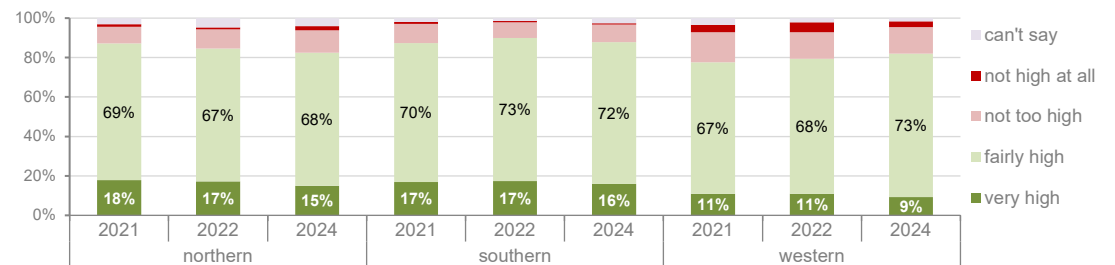
When asked to rate their *satisfaction* with GRDC's performance as investors in grains research, on average, respondents awarded GRDC a score of 6.9 points out of a possible 10 (no real change from 2022; 7.0).

Consistent with past years, this rating varies by region, from 7.1 among those in the south, to a significantly lower 6.5 among western respondents. Western growers are the least likely to attribute RD&E benefits to GRDC, and rate the corporation highly for adding value to businesses and addressing local issues.

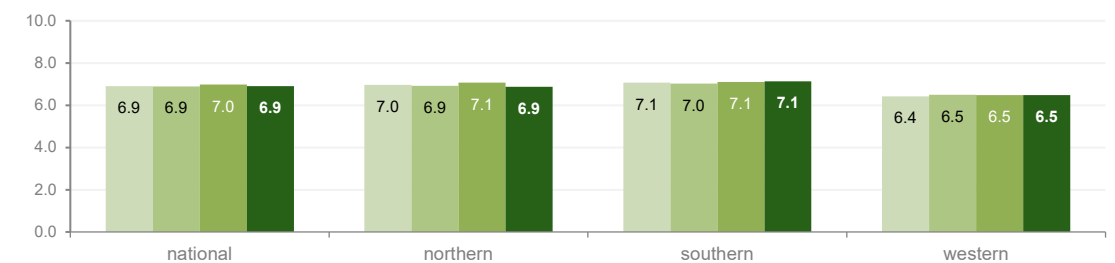
GRDC rating as research investors (base: respondents aware of GRDC; Q4)



GRDC rating as research investors by region (base: aware GRDC; Q4)



satisfaction with GRDC's performance (mean) (base: aware GRDC; Q6)



perception of GRDC's performance as investors in grains research (Q4/Q6)	% mentioning (base: respondents aware of GRDC)									
	total		region			tonnes produced				
	2022 n = 1193	2024 n = 1197	northern n = 492	southern n = 467	western n = 238	<5000 n = 697	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Very high	16%	14%	15%	16%	9%	↑ 12%	19%	11%	19%	21%
Fairly high	70%	70%	68%	72%	73%	71%	↑ 68%	77%	69%	56%
Not too high	10%	11%	11%	9%	13%	11%	8%	8%	9%	20%
Not high at all	2%	2%	2%	1%	3%	1%	1%	3%	3%	3%
Can't say	3%	3%	4%	3%	2%	4%	↓ 4%	↓ 0%	0%	0%
Total: high	86%	84%	82%	88%	82%	84%	87%	88%	88%	76%
Total: not high	11%	12%	13%	10%	16%	13%	9%	12%	12%	24%
Mean satisfaction rating	7.0	6.9	↓ 6.9	7.1	6.5	6.9	7.1	6.9	6.9	6.5

↑ statistically significant increase since 2022 ; ↓ statistically significant decrease since 2022 * Caution small sub sample Errors due to rounding

4.2 RD&E discussions with GRDC

Question asked: Q9. Have you ever discussed research, development and extension needs or ideas with ... read out?

Key findings Nationally, the proportion of respondents discussing RD&E ideas with GRDC has trended upward since 2021.

This trend is reflected across northern and western regions, but in the south remains on par with 2022. Western region growers (69%) remain significantly more likely to have discussed RD&E ideas with GRDC than northern (51%) and southern (47%) respondents.

Consistent with past years, the proportion of respondents discussing RD&E ideas with GRDC varies by production size (82% of those producing greater than 25,000 tonnes to 44% producing less than 5,000).

Survey results suggest that since 2021, GRDC personnel (37%), Panel members (35%) and the GRDC National Grower Network (NGN) (32%) are facilitating RD&E discussions with an increasing proportion of growers.

Notably, 87% of respondents discussing RD&E ideas with GRDC rate the corporation's performance as investors in grains research *highly*, compared to a significantly lower 81% who have not discussed RD&E with GRDC.

Readers of this report should note that some caution is required comparing results prior to 2022 due to changes to question structure.

Additionally, NGN results may include past discussions with Regional Cropping Solution Networks (RCSNs) or Grower Solutions Groups (GSGs).

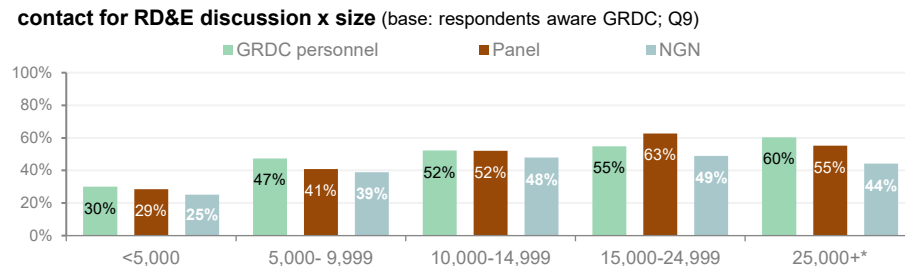
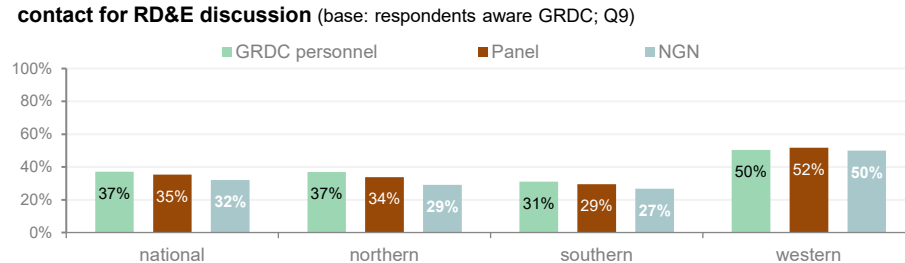
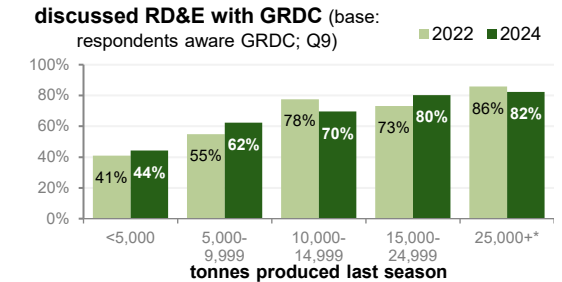
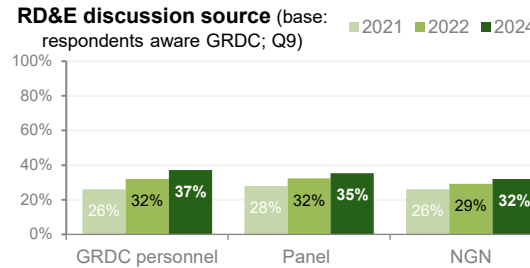
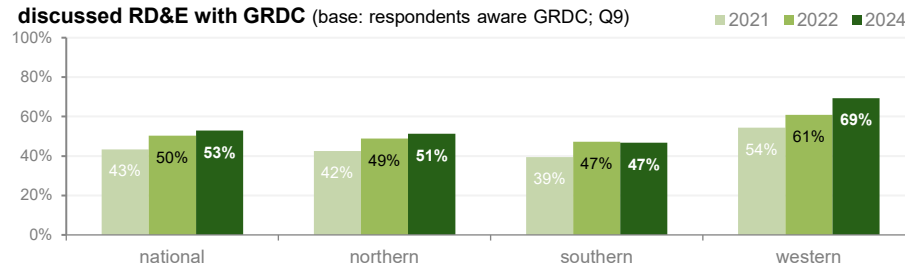








Table 9

discussed RD&E issue with GRDC (Q9)	% mentioning (base: all respondents aware of GRDC)									
	total		region			tonnes produced				
	2022 n = 1193	2024 n = 1197	northern n = 492	southern n = 467	western n = 238	<5000 n = 697	5,000-9,999 n = 250	10,000- 14,999 n=84	15,000- 24,999 n=65	25000+ n = 29*
Total: discussed RD&E issue with GRDC	50%	53%	51%	47%	69%	44%	62%	70%	80%	82%
GRDC personnel	32%	 37%	37%	31%	50%	 30%	 47%	52%	55%	60%
Regional Panel member	32%	35%	34%	29%	52%	 29%	41%	52%	63%	55%
GRDC National Grower Network	29%	32%	29%	27%	 50%	25%	39%	48%	49%	44%

 statistically significant increase since 2022 *Caution: small sub sample

4.3 GRDC's response to RD&E discussions

Question asked: Q10. To your knowledge, did GRDC respond to the need or the idea you raised?

Key findings Among those discussing RD&E ideas with GRDC staff, Panels or the NGN, belief that the Corporation responded at least *partially* to the idea has trended upwards since 2021 (85% of those discussing RD&E with GRDC).

This trend is reflected among northern and southern regions and since 2022, has increased 6 points among those in the west.

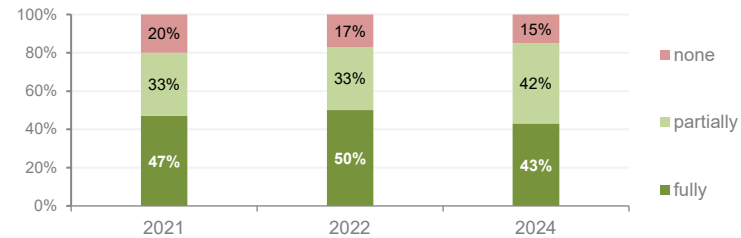
However, compared to 2022, a significantly higher proportion of respondents perceive GRDC to have responded to the RD&E idea *partially*, while the proportion believing GRDC responded *fully* has dipped.

Belief GRDC responded *fully* varies among the following segments:

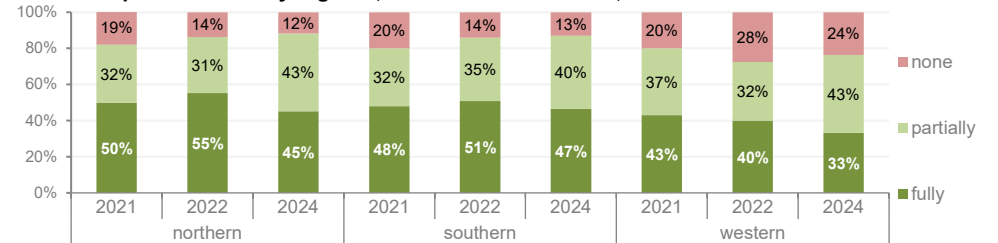
- Region (47% of southern growers discussing RD&E ideas with GRDC to 33% of western counterparts)
- Age group (57% aged 18-39 to 38% of those 60+)
- Rating GRDC's performance as investors in grains research *highly* (47% rating high, 11% rating GRDC not highly)

Additionally, among those discussing RD&E ideas with GRDC, 24% of western region respondents did not receive a response to the idea, compared to 13% of southern and 12% of northern counterparts.

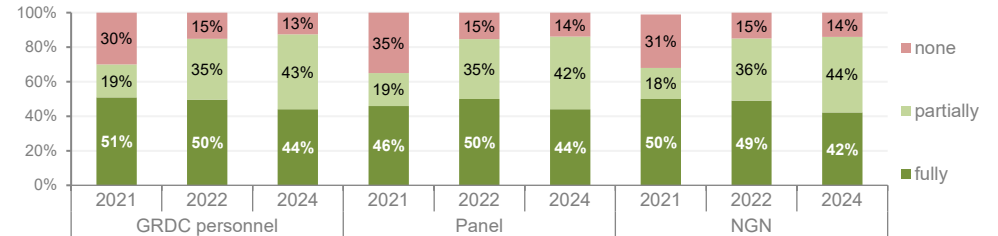
GRDC response to idea (base: discussed RD&E; Q10)



GRDC response to idea by region (base: discussed RD&E; Q10)



GRDC response to idea by discussion source (base: discussed RD&E; Q10)



GRDC response by production size (base: discussed RD&E; Q10)

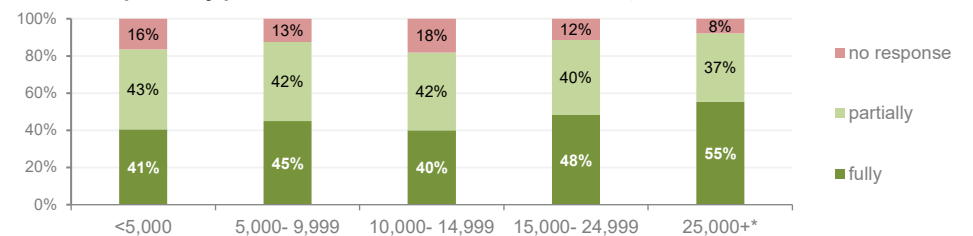


Table 10

GRDC responded to need or idea (Q10)	% mentioning (base: discussed RD&E with GRDC)									
	total		region			tonnes produced				
	2022 n = 604	2024 n = 638	northern n = 253	southern n = 220	western n = 165	<5000 n = 311	5,000-9,999 n = 157	10,000- 14,999 n=59	15,000- 24,999 n=52	25000+ n = 24*
Total: Yes/partially	83%	85%	88%	87%	76%	84%	87%	82%	88%	92%
Yes	50%	↓ 43%	↓ 45%	47%	33%	↓ 41%	45%	40%	48%	55%
Partially	33%	↑ 42%	↑ 43%	40%	43%	↑ 43%	42%	42%	40%	37%
No	17%	15%	12%	13%	24%	16%	13%	18%	12%	8%

Table 11

GRDC responded to need or idea (Q10)	% mentioning (base: discussed RD&E with GRDC)			
	2024 n = 638	GRDC personnel (n =448)	Regional Panel member (n = 428)	National Grower Network (n =388)
Total: Yes/partially	85%	87%	86%	86%
Yes	↓ 43%	↓ 44%	44%	42%
Partially	↑ 42%	↑ 43%	↑ 42%	↑ 44%
No	15%	13%	14%	14%

↑ statistically significant increase since 2022; ↓ statistically significant decrease since 2022 *Caution: small sub sample

4.4 Perceived to have benefitted from grains industry RD&E and GRDC's role in the benefit

Questions asked:

Q11. Do you feel you have directly benefitted from any research and development project or extension activities or on farm trials undertaken in the grains industry in the past five years?

Q13. Did the GRDC play a role in achieving any of these benefits from R&D?

Key findings On par with 2022, 82% of respondents believe they have directly benefitted from RD&E activities over the past five years.

While this perception is widespread across each region and production size segment, it varies from 85% among southern growers to a significantly lower 79% in the north and from 89% of growers producing greater than 5,000 tonnes of grain to 78% among smaller counterparts.

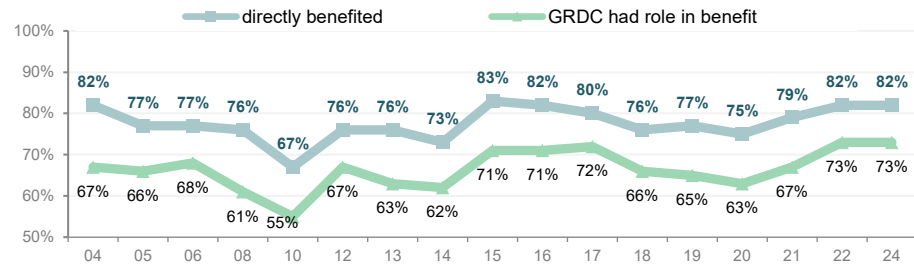
The western region result (84%) has trended upwards since 2020 and is the highest since the survey's inception.

On par with 2022, 73% of all respondents (equivalent to 80% of those benefitting from RD&E) believe that GRDC played a *significant (30%)* or *minor (44%)* role in the RD&E benefit. This result, however, varies by the following segments:

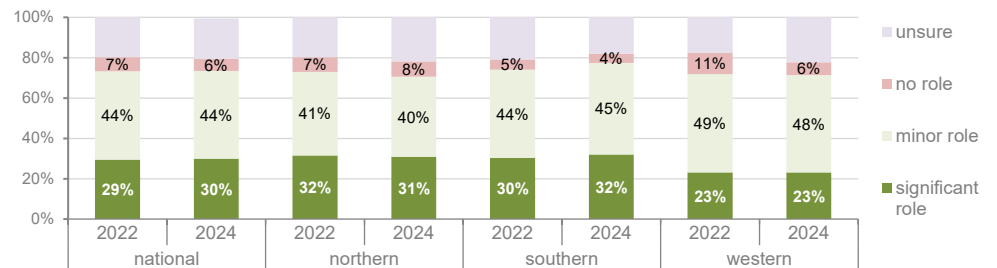
- Region (77% in southern region believing GRDC played a role in the RD&E benefit to 71% in the west and north)
- Age group (86% among growers aged 18-40, compared to 71% of older counterparts)
- Production size (79% producing greater than 5,000 tonnes to 71% producing less)

The proportion of southern region growers believing GRDC played a role in the RD&E benefit has trended upwards since 2019 and is the now highest since the survey first captured this data.

directly benefited from RD&E (base: all respondents; Q11/13)



degree of GRDC's role in benefit (base: all respondents; Q13)



i

benefit from RD&E and attribute a role to GRDC (base: all respondents; Q11/Q13)

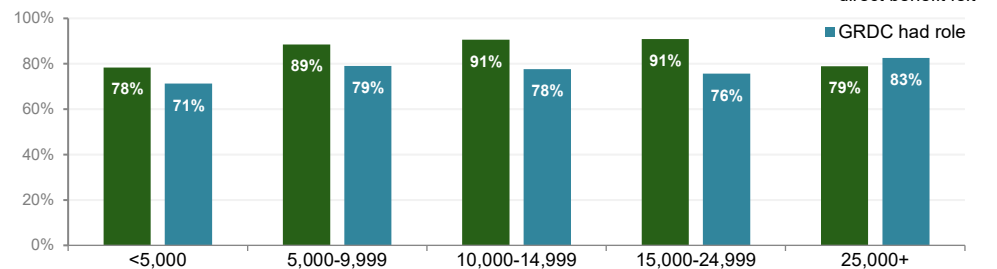


Table 12

whether direct benefit felt (Q11/Q13)	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Direct benefit felt	82%	82%	79%	85%	84%	78%	89%	91%	91%	79%
GRDC had significant role in benefit	29%	30%	31%	32%	23%	28%	35%	38%	31%	25%
GRDC had minor role in benefit	44%	44%	40%	45%	48%	43%	45%	39%	45%	58%
Total: GRDC had role in benefit	73%	73%	71%	77%	71%	71%	79%	78%	76%	83%

*Caution small sub sample

4.5 Perceived impact of RD&E activities

Question asked:

Q12. For each of the following 5 areas, I would like you to tell me if you think RD&E activities have had a major impact on the grains industry over the past 5 years, a moderate impact, a minor impact or no impact at all?

Key findings On par with 2022, 82% of respondents nationally believe that RD&E activities have had a *major* or *moderate* impact on improving yield for the grains industry over the past 5 years.

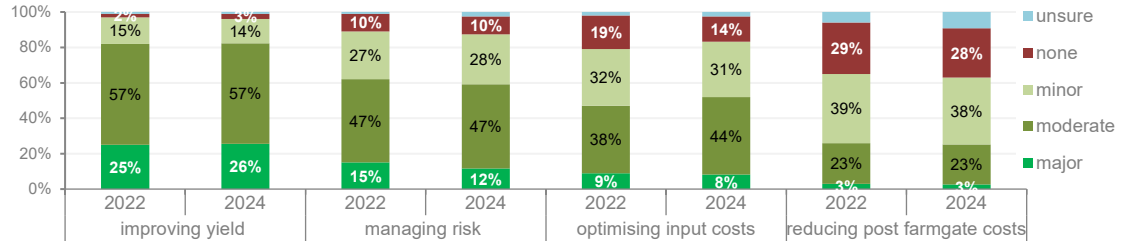
While this perception is widespread across each region, it varies from 88% among southern growers to a significantly lower 80% in the north and 76% in the west.

Approximately 6 in 10 (59%, was 62% in 2022) respondents believe RD&E activities have had a *major* or *moderate* impact on managing risk to maximise profit and minimise losses, but this perception is again more widespread in the south (65%), than among northern (57%) and western (52%) region respondents.

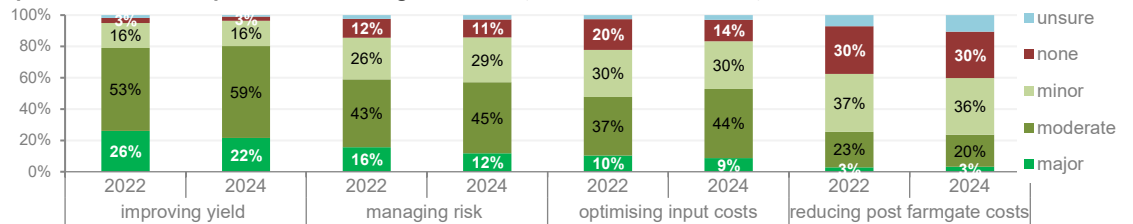
Compared to 2022, belief RD&E activities have had a *major* or *moderate* impact on optimising input costs is significantly more widespread (52%, up significantly from 47%). However, this perception is significantly less widespread in the west (41%) than northern (53%) and southern (56%) regions.

While 25% (was 26% in 2022) of respondents believe grains industry research has had a *major* to *moderate* impact on reducing post-farm-gate costs, more than 6 in 10 say it has had at least a *minor* impact over the last 5 years (*errors due to rounding*).

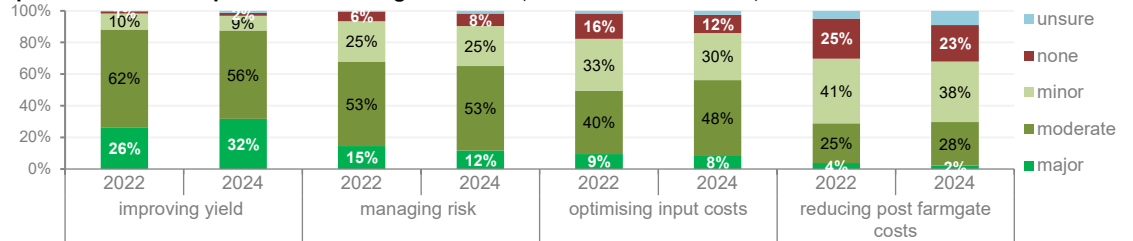
perceived RD&E impact (base: aware of GRDC; Q12)



perceived RD&E impact - northern region results (base: aware of GRDC; Q12)



perceived RD&E impact - southern region results (base: aware of GRDC; Q12)



perceived RD&E impact - western region results (base: aware of GRDC; Q12)

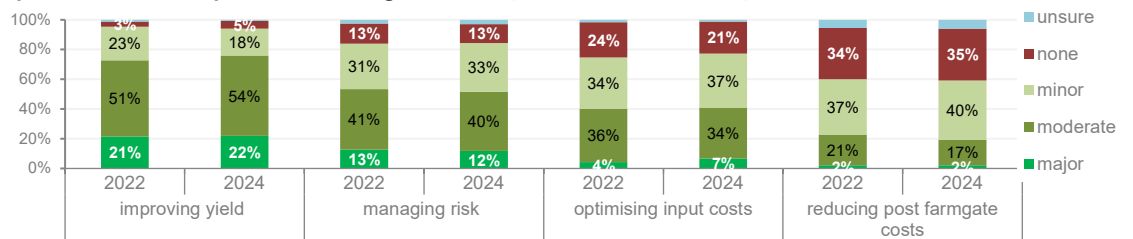


Table 13

perceived impact of RD&E activities (Q12)	% mentioning (base: all respondents)						
	total: at least minor impact	total: moderate to major impact	major impact	moderate impact	minor impact	no impact at all	unsure
Improving yield & yield stability	96%	82%	26%	57%	14%	3%	1%
Managing risk to maximise profit and minimise losses	87%	59%	ê 12%	47%	28%	10%	2%
Optimising input costs	83%	ê 52%	8%	ê 44%	31%	ê 14%	3%
Reducing post-farm-gate costs	63%	25%	3%	23%	38%	28%	ê 9%

Table 14

perceive RD&E activities had a major to moderate to impact over the past 5 years (Q12)	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Improving yield & yield stability	82%	82%	80%	88%	76%	81%	85%	81%	86%	79%
Managing risk to maximise profit and minimise losses	62%	59%	57%	65%	52%	57%	60%	63%	59%	72%
Optimising input costs	47%	52%	53%	ê 56%	41%	51%	54%	53%	38%	58%
Reducing post-farm-gate costs	26%	25%	24%	30%	19%	25%	26%	26%	19%	18%

↑ statistically significant increase since 2022; ↓ statistically significant decrease since 2022 *Caution: small sub sample errors due to rounding

5. Farm practices

5.1 Implemented practice change over past 3 years and associated stimulus

Question asked:

Q14. Have you changed your farming practices, techniques or methods in the past 3 years as a result of any of the following?

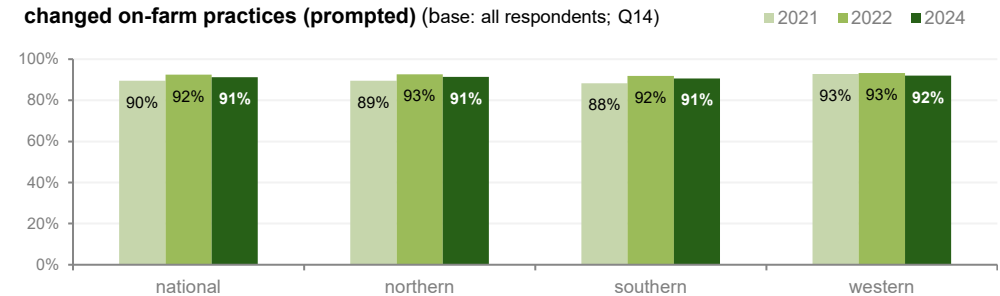
Key findings In total, 91% of respondents (when prompted) say that they changed their farm practices, techniques or methods over the past 3 years – no significant variation from 2022 (92%).

Approximately 6 in 10 growers (61%) nominate either R&D outcomes (53%) and/or GRDC information (44%) a stimulus to change practices

While the proportion of all respondents nominating R&D outcomes a stimulus for change remains reasonably high, this result is slightly (not statistically significantly) lower than in 2022 (57%) and varies by the following segments:

- Production size (64% of growers producing greater than 5,000 tonnes to a much lower 47% producing less)
- Age group (71% of younger growers, compared to 50% of the 40+ age group).

changed on-farm practices (prompted) (base: all respondents; Q14)



practice change stimulus (base: all respondents; Q14)

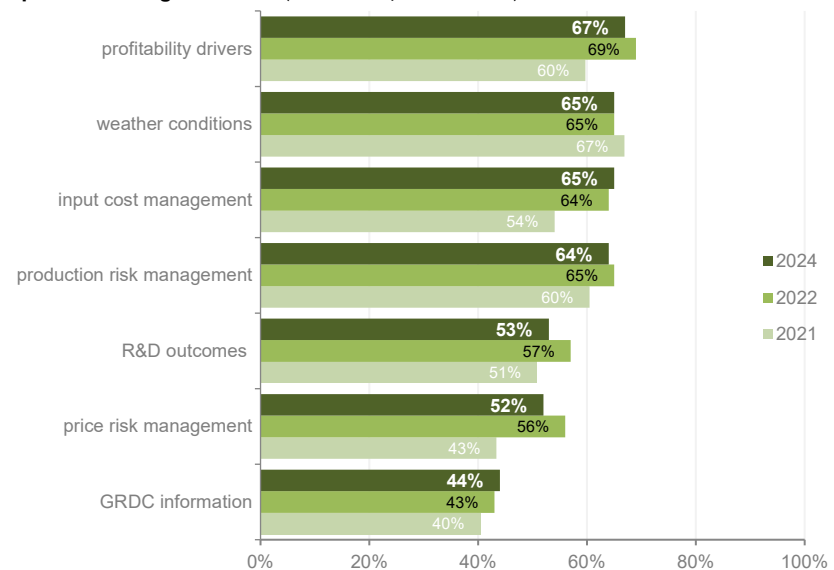


Table 15

stimulus (prompted) (Q14)	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000- 14,999 n=84	15,000- 24,999 n=65	25000+ n = 29*
Total: changed practices in the last 3 years	92%	91%	91%	91%	92%	89%	94%	98%	95%	93%
Profitability drivers	69%	67%	è 64%	70%	69%	63%	71%	80%	80%	76%
Production risk management	65%	64%	63%	65%	65%	61%	è 63%	76%	71%	76%
Seasonal or weather conditions	65%	65%	69%	59%	70%	65%	62%	66%	71%	69%
Input cost management	64%	65%	65%	62%	69%	63%	67%	70%	69%	71%
R&D outcomes in the grains industry generally	57%	53%	51%	55%	56%	è 47%	65%	63%	62%	65%
Price risk management	56%	è 52%	è 50%	53%	55%	50%	51%	62%	68%	54%
GRDC information, supported training event, workshop, project or other specific activity	43%	44%	41%	51%	37%	39%	53%	54%	48%	49%

↓ statistically significant decrease since 2022 * *Caution small sub sample*

5.2 Confidence in the ability of the grains research industry

Questions asked:

Q15. How confident are you that research in the grains industry can respond quickly to... read out? Q15a. How confident are you that research in the grains industry is well placed to assist growers to cope with ongoing changes in... read out

Key findings While nearly 6 in 10 respondents (58%) feel confident that research in the grains industry can respond quickly to new biosecurity threats such as managing pests, weeds and diseases, this result is significantly lower than in 2022 (67%).

The significant reduction is reflected in the northern region, where growers are now significantly less likely to be confident than western and southern counterparts. Notably, only 33% of QLD Central and 41% of NSW NW/QLD SW growers are confident, but dry seasonal conditions may also be impacting this result.

Approximately half of all respondents are confident that research in the grains industry is well placed to assist growers to cope with ongoing changes in the following areas:

- opportunities/threats to Australian grain markets (53% confident, 45% not confident)
- seasonal or weather conditions (49% confident, 49% not confident)
- inputs, such as fertiliser costs/availability (46% confident, 53% not confident)

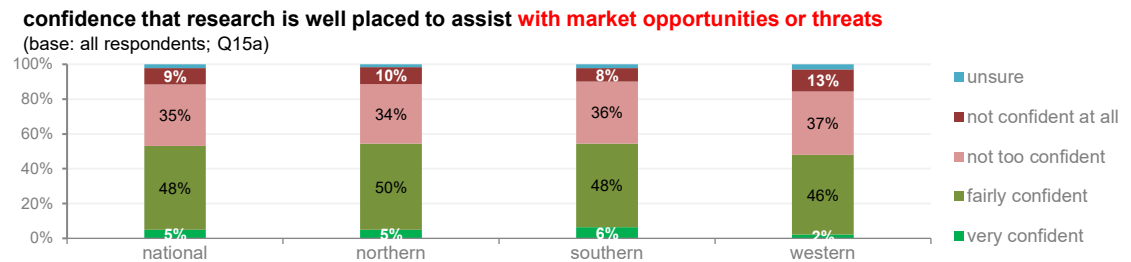
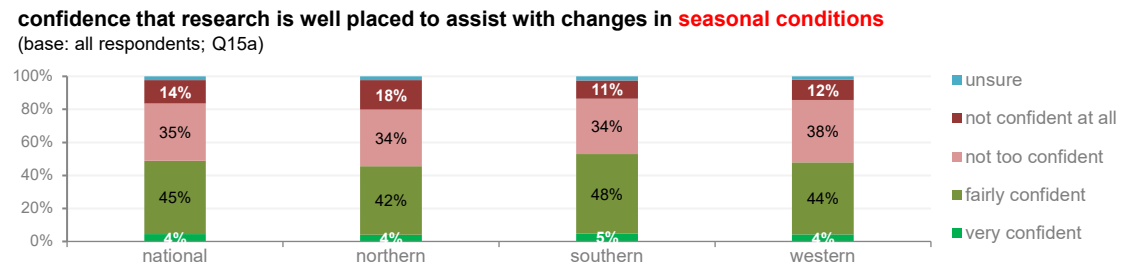
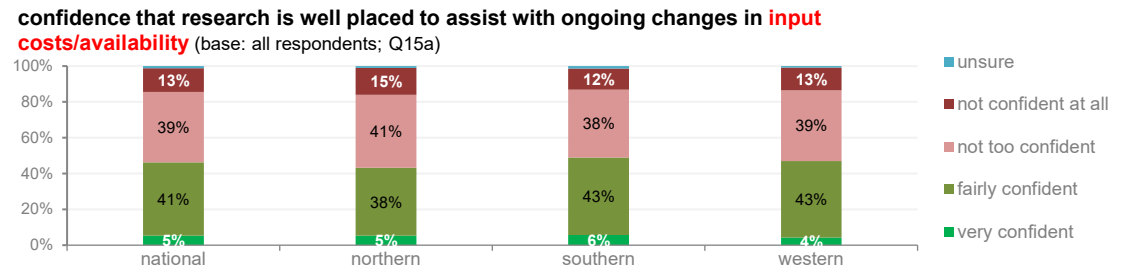
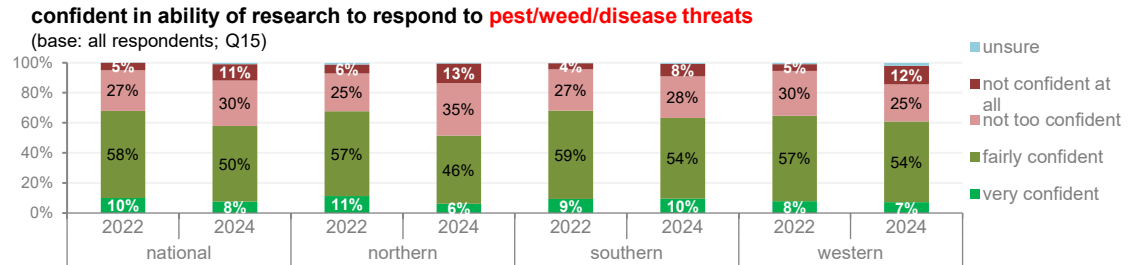


Table 16

confidence in the research industry's ability	% mentioning (base: all respondents)						
	total: confident	very confident	fairly confident	total: not confident	not too confident	not confident at all	unsure
Respond quickly to new biosecurity threats, such as managing weed, disease and pest threats	↑ 58%	8%	↓ 50%	↓ 41%	30%	↓ 11%	1%
Well placed to assist growers to cope with ongoing changes in opportunities or threats to Australian grain markets †	53%	5%	48%	45%	35%	9%	2%
Well placed to assist growers to cope with ongoing changes associated with seasonal or weather conditions †	49%	4%	45%	49%	35%	14%	2%
Well placed to assist growers to cope with ongoing changes in inputs, such as fertilizer costs and availability †	46%	5%	41%	53%	39%	13%	1%

Table 17

confidence in the research industry's ability – % agreeing	% mentioning (base: all respondents)									
	total		region			tonnes produced				
	2022 n = 1200	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Respond quickly to new biosecurity threats, such as managing weed, disease and pest threats	67%	↑ 58%	↓ 52%	63%	61%	↓ 57%	63%	56%	↓ 48%	51%
Well placed to assist growers to cope with ongoing changes in opportunities or threats to Australian grain markets	47%	53%	54%	54%	48%	52%	58%	52%	49%	49%
Well placed to assist growers to cope with ongoing changes associated with seasonal or weather conditions †	39%	49%	46%	53%	48%	45%	51%	59%	53%	52%
Well placed to assist growers to cope with ongoing changes in inputs, such as fertilizer costs and availability †	31%	46%	43%	49%	47%	43%	53%	46%	50%	38%

↑ statistically significant increase since 2022; ↓ statistically significant decrease since 2022 *Caution: small sub sample †Comparison to past data unavailable due to question alteration in 2024

5.3 Practices changed to potentially sell grain to high margin markets (new in 2024)

Question asked:

Q16. Over the past 3 years, has the potential to sell grain to high margin markets influenced your...

Key findings In total, 76% of all respondents say that potentially selling grain to high margin markets has influenced either their crop grown (54%), variety choice (55%) and/or management practice (56%).

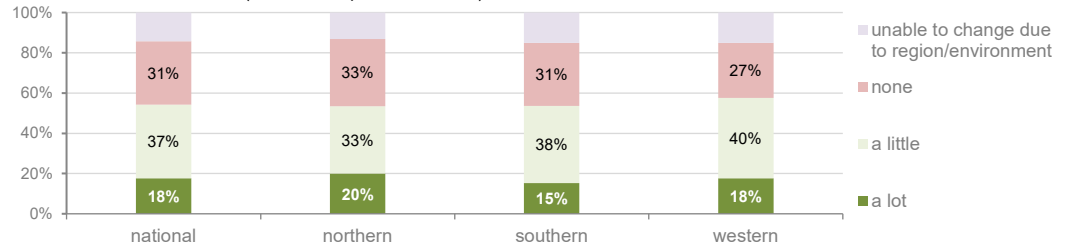
While there is no significant variation by region, respondents producing greater than 5,000 tonnes of grain are significantly more likely to say that potentially selling grain to high margin markets influenced at least one practice than smaller counterparts (83% and 71% respectively).

For 34% of all respondents, potentially selling grain to high margin markets has influenced each of their crop grown, variety selected and management practices.

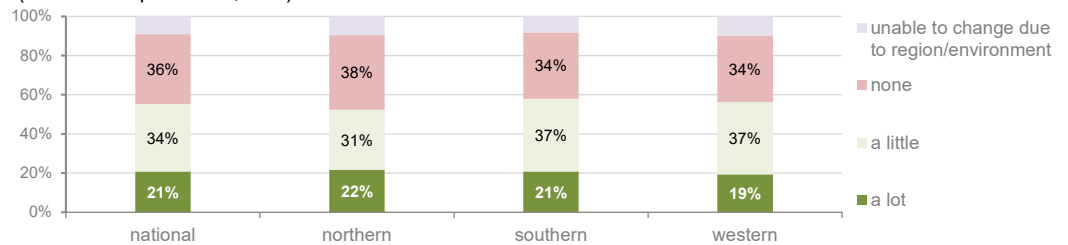
Across each practice, those producing greater than 5,000 tonnes are at least slightly more likely to say potentially selling grain to high margin markets influenced their decisions.

While younger growers are no more likely than older counterparts to say that their variety choice or management practices were influenced by potentially selling grain to high margin markets, they are significantly more likely to say they type of crop grown was influenced.

influence of potentially selling to high margin market on crop grown
(base: all respondents ; Q16)



influence of potentially selling to high margin market on variety choice
(base: all respondents ; Q16)



influence of potentially selling to high margin market on management practices
(base: all respondents ; Q16)

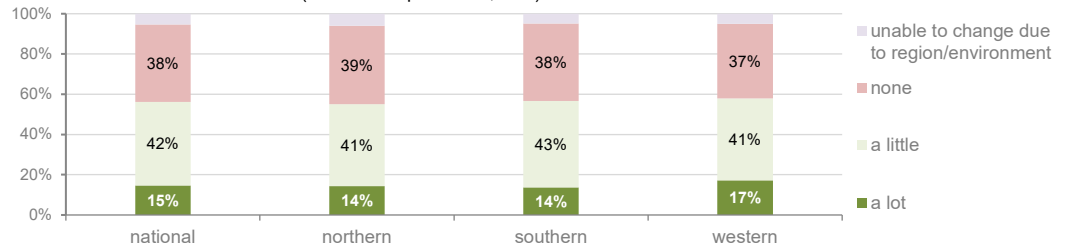


Table 18

choice of crop grown influenced by high margin markets (Q16)	% mentioning (base: all respondents)								
	total	region			tonnes produced				
	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Total: crop grown influenced by high margin markets	54%	53%	54%	58%	49%	59%	66%	73%	65%
A lot of influence	18%	20%	15%	18%	16%	17%	24%	29%	25%
A little influence	37%	33%	38%	40%	33%	42%	43%	44%	41%
No influence at all	31%	33%	31%	27%	35%	29%	22%	16%	25%
Unable to alter crop due to region/environment	14%	13%	15%	15%	16%	12%	12%	11%	10%

Table 19

choice of variety influenced by high margin markets (Q16)	% mentioning (base: all respondents)								
	total	region			tonnes produced				
	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Total: variety grown influenced by high margin markets	55%	52%	58%	56%	53%	56%	59%	66%	62%
A lot of influence	21%	22%	21%	19%	19%	22%	25%	29%	27%
A little influence	34%	31%	37%	37%	34%	34%	34%	36%	34%
No influence at all	36%	38%	34%	34%	36%	36%	35%	31%	31%
Unable to alter crop due to region/environment	9%	10%	8%	10%	11%	8%	6%	3%	7%

Table 20

management practices influenced by high margin markets (Q16)	% mentioning (base: all respondents)								
	total	region			tonnes produced				
	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Total: management practices influenced by high margin markets	56%	55%	57%	58%	51%	61%	71%	64%	76%
A lot of influence	15%	14%	14%	17%	13%	16%	23%	20%	24%
A little influence	42%	41%	43%	41%	38%	45%	47%	45%	52%
No influence at all	38%	39%	38%	37%	42%	36%	25%	29%	21%
Unable to alter crop due to region/environment	5%	6%	5%	5%	6%	4%	4%	6%	3%

*Caution: small sub sample

6. Quantitative sample demographics (based on unweighted data)

6.1 Gender

Table 21

gender (Q24)	% mentioning (base: all respondents)								
	total	region			tonnes produced				
	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
Male	95%	95%	97%	91%	94%	98%	99%	92%	97%
Female	5%	5%	3%	9%	6%	2%	1%	8%	3%

*Caution small sub sample

6.2 Age

Table 22

age (Q22)	% mentioning (base: all respondents)								
	total	region			tonnes produced				
	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
18 to 39	15%	15%	14%	14%	12%	16%	25%	20%	24%
40 to 59	48%	47%	47%	54%	↑ 48%	50%	42%	60%	45%
60+	37%	38%	39%	32%	↓ 40%	34%	33%	20%	31%
Mean age (years)	54	54	55	54	↓ 55	53	52	50	53

*Caution small sub sample

6.3 Years in industry

Table 23

years in industry (Q23)	% mentioning (base: all respondents)								
	total	region			tonnes produced				
	2024 n = 1200	northern n = 493	southern n = 469	western n = 238	<5000 n = 700	5,000-9,999 n = 250	10,000-14,999 n=84	15,000-24,999 n=65	25000+ n = 29*
5 or less	1%	1%	1%	1%	1%	1%	1%	0%	3%
6 to 10	5%	5%	5%	7%	5%	4%	6%	6%	0%
11 to 20	17%	18%	16%	16%	15%	18%	20%	22%	21%
21+	77%	76%	78%	76%	79%	77%	73%	72%	76%
Mean (years)	34	33	34	33	34	33	32	30	33

↑ statistically significant increase since 2022; ↓ statistically significant decrease since 2022 *Caution small sub sample