Farmers benefitting and adopting from R&D where are we now?

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Overview of presentation

- Background
- Research approach
- Key findings related to the workshop focus
  - Workshop paper
- Opportunities for greater private-sector engagement
  - Policies
  - Actions

The conclusion: How to grasp the opportunities individually and collectively?

The way returns from R&D are increased (on-farm) via a more engaged private sector in extension is via collective effort.

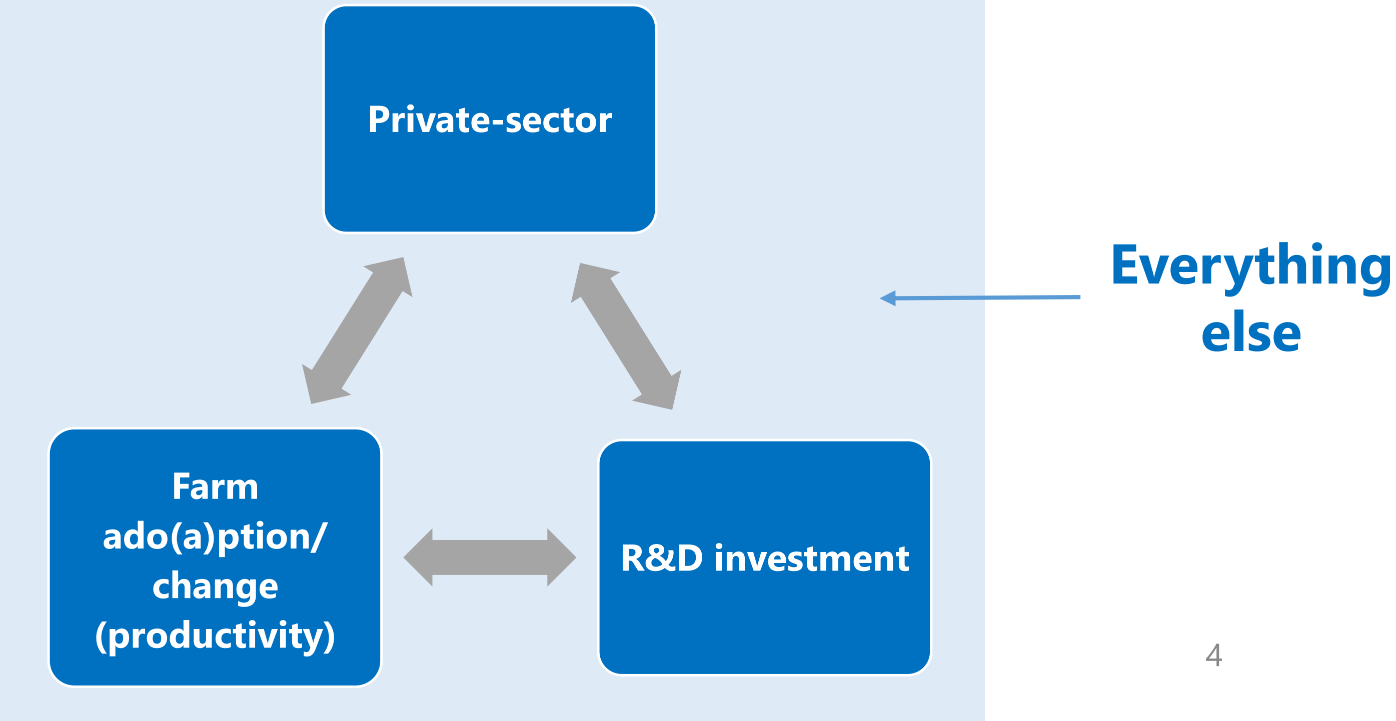
Demand is there. Services are *mostly* ready, willing, able.

Need to:

- Increase real and perceived value of advice
- Support issues of access amongst key groups
- Increase private-sector involvement in
  - priority setting
  - research translation
  - product/service development
- Engage a wide range of professional associations and support PD in extension
- Make new policies (government/industry) and establish suitable governance to:
  - Help transition to a more co-ordinated/collaborative advisory and extension system
  - Harness the real strength of the collective effort

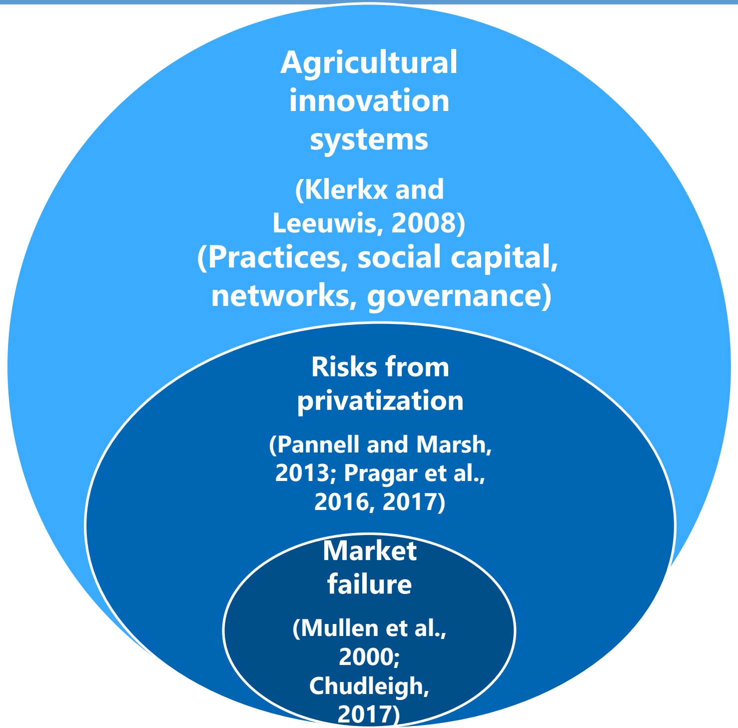
Background

- Refer to Workshop paper
- National (cf State/Regional/Sectoral)
- Extension
- R&D



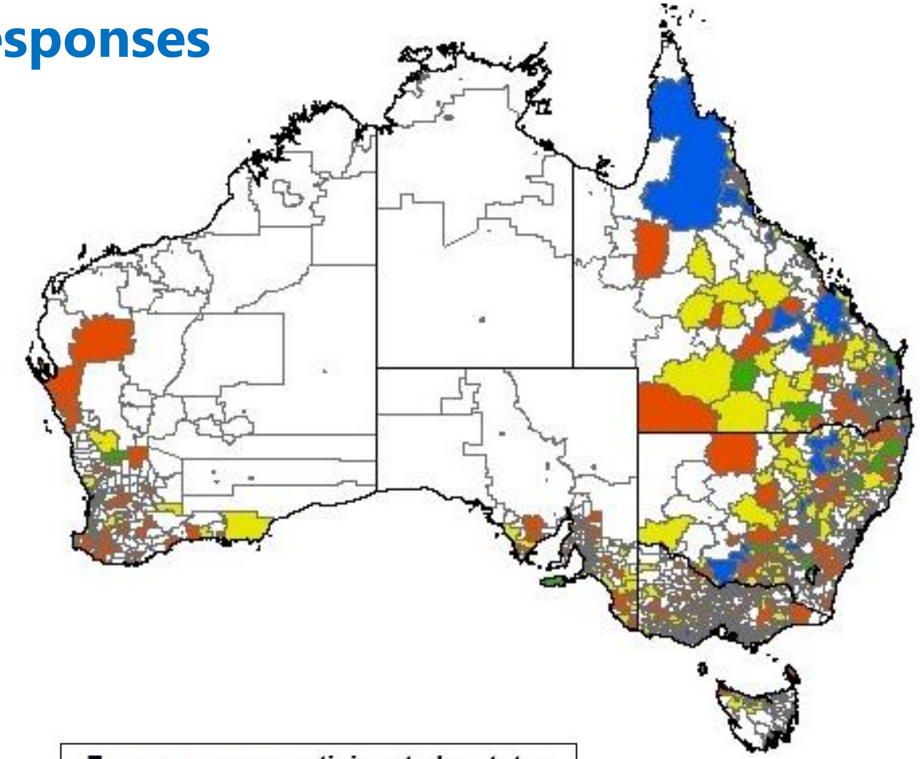
Research Approach

- Build on and add to previous work:
  - Australia
  - Internationally
- Conceptual framework
- Nationally significant data-sets (policy)
- Voices/Lived-experience
  - Farmers
  - Private-sector



Survey sample

Farmer responses



Legend

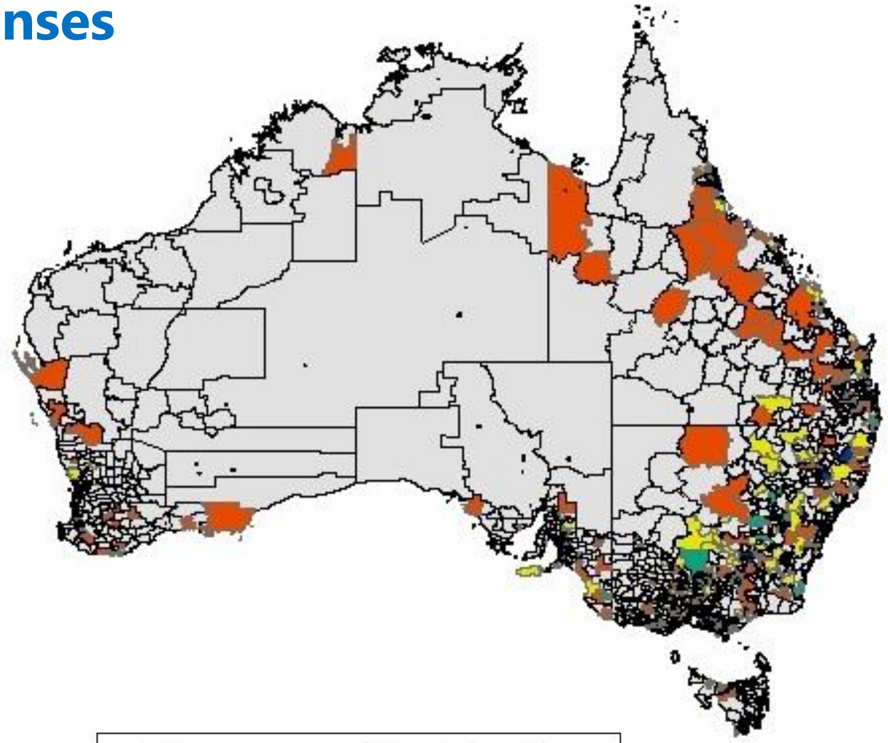
- None
- 1 farm
- 2-3 farms
- 4-5 farms
- 6-14 farms

Farmer survey participants by states

States	N	States	N
NSW	317	WA	79
QLD	261	TAS	27
VIC	228	ACT	1
SA	90	NT	0

Adviser responses

A proportionally larger number of SME's represented in the sample 27% of respondent employees said only 1-5 other people in their organisation provided information, advice and support to farmers (n=324)



Legend

- None
- 1 adviser
- 2-3 advisers
- 4-7 advisers
- 8-14 advisers

Adviser survey participants by states

States	N	States	N
NSW	190	WA	29
VIC	185	TAS	12
QLD	99	ACT	2
SA	89	NT	2
		International office	2

Definitions/terms used

- Extension: Information, advice, support
- ‘Main source’/Provider typology
- Farm size: Larger >$1M average gross farm income
- Sector/enterprise: RDC and ABS categories for farmers/advisers

Source of information, advice and support
Government
Research and development corporations/Industry
Product reseller / farm input suppliers
Independent (Fee-for-service) advisers
Farmer-owned information, advice and support organisations
Processing companies
Other

Key findings

1. Farmer demand for private sector advisory services

Questions you may be asking:

- can I expand my business?
- is the need changing?
- engagement in extension projects?

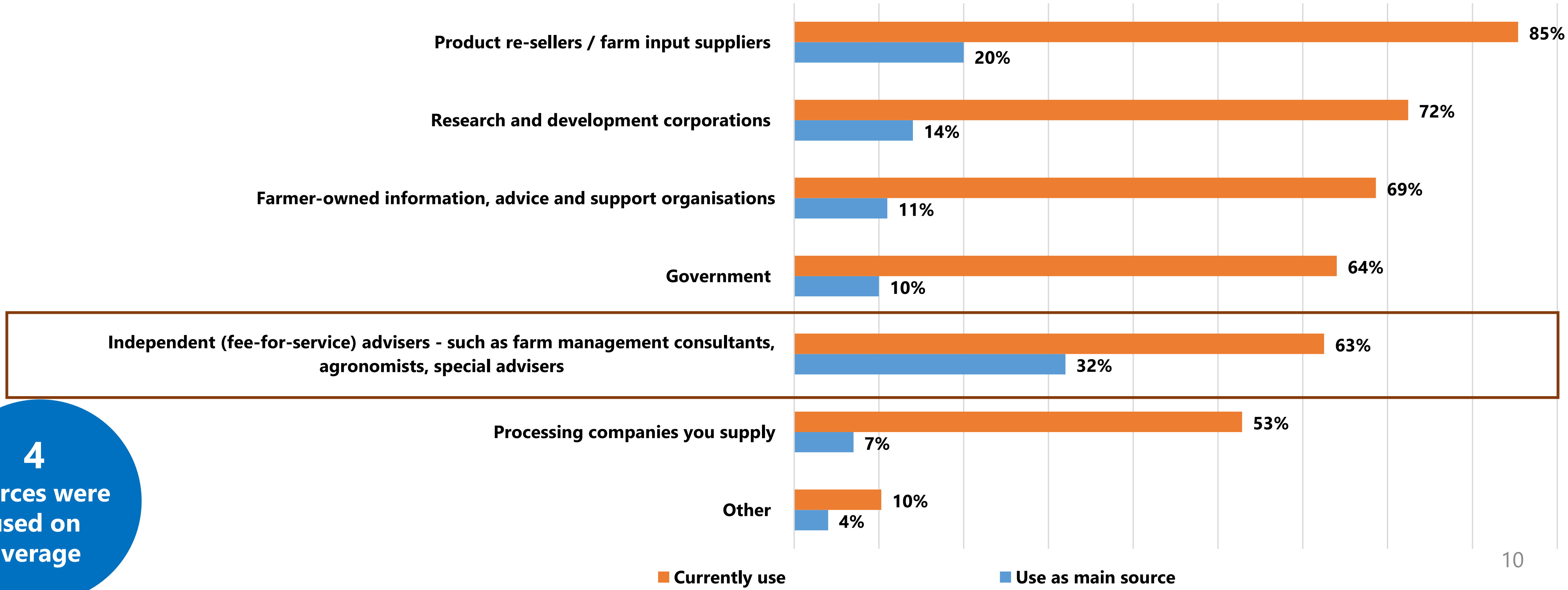
Farmers are seeing challenges: skills, knowledge, costs

% Agree (6 & 7)	Cotton (n=50)	Hort (n=130)	Sugar Cane (n=88)	Poultry / Pork (n=60)	Mixed - cropping and grazing (n=76)	Dairy cattle (n=81)	Cropping (grains) (n=171)	Sheep for wool (n=57)	Beef cattle (n=181)	Sheep for meat (n=85)
I currently have the skills and knowledge required to manage the property / farm effectively	63%	57%	75%	62%	56%	63%	56%	69%	47%	45%
I always know where to get the information or advice that I need	54%	47%	58%	29%	46%	46%	38%	31%	32%	34%
I can further lower my cost of production	63%	44%	29%	50%	38%	27%	24%	56%	43%	34%

*X% / X% = p<0.05 statistically significant difference – higher /lower *=low base size*

While farm input suppliers were most commonly used, independent advisers were a prominent main source of information.

Sources where farmers obtained information, advice or support (all n=1003; main source n=978)



4 sources were used on average

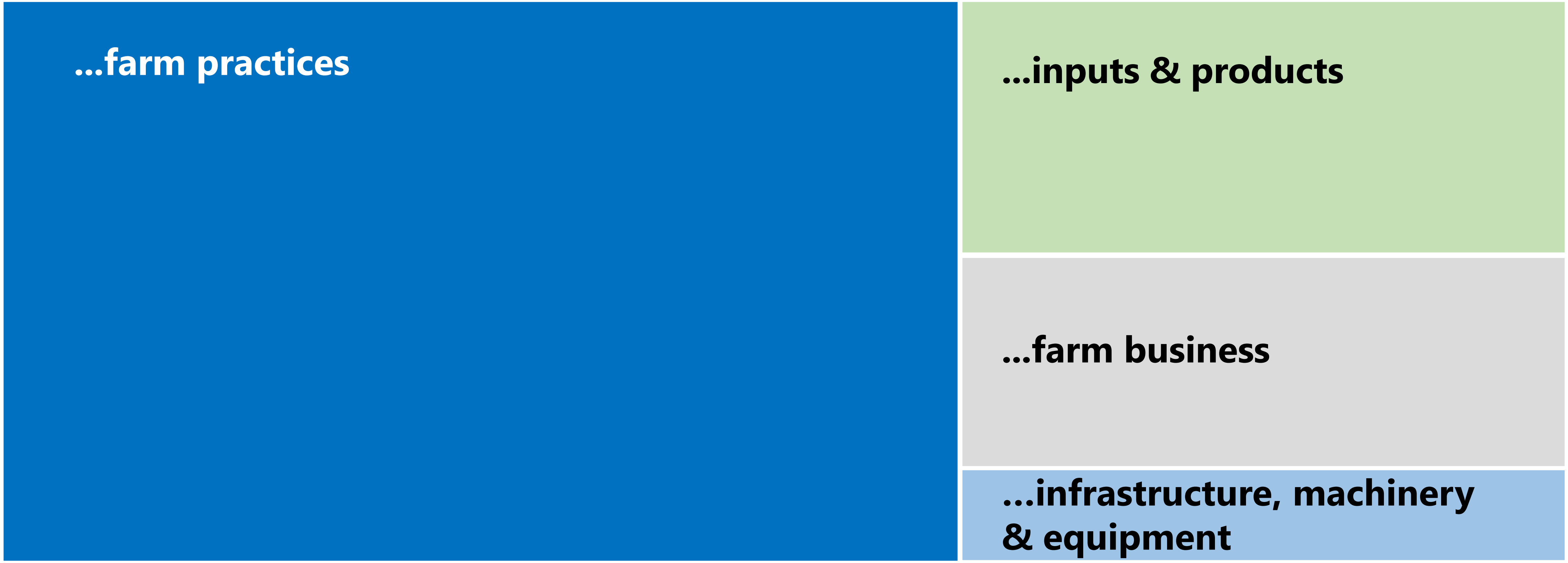
Main source of information, advice and support by gross farm income

Source of information, advice and support	Level 1 (less than $50,000)	Level 2 ($50,000-$500,000)	Level 3 ($500,000 - $1 mil.)	Level 4 ($1 mil. - $5 mil.)	Level 5 (more than $5 mil.)	Total	Trend with farm size
Government	18%	15%	8%	2%	0%	11%	
n	24	49	8	3	2	86	
R&D corporation	13%	16%	17%	12%	9%	14%	
n	21	69	20	24	7	141	
Product reseller / farm input suppliers	31%	20%	18%	13%	18%	20%	
n	34	81	16	31	11	173	
Independent (Fee-for-service) advisers	9%	25%	42%	55%	52%	32%	
n	15	91	44	97	24	271	
Farmer-owned organisations	14%	12%	8%	8%	11%	11%	
n	22	52	12	21	3	110	
Processing companies	7%	9%	2%	5%	9%	7%	
	8	30	5	10	3	56	
Other	8%	3%	4%	5%	1%	4%	
	12	16	6	11	1	46	
Total	100%	100%	100%	100%	100%	100%	
	136	388	111	197	51	883	

There is no monopoly on change/adoption…

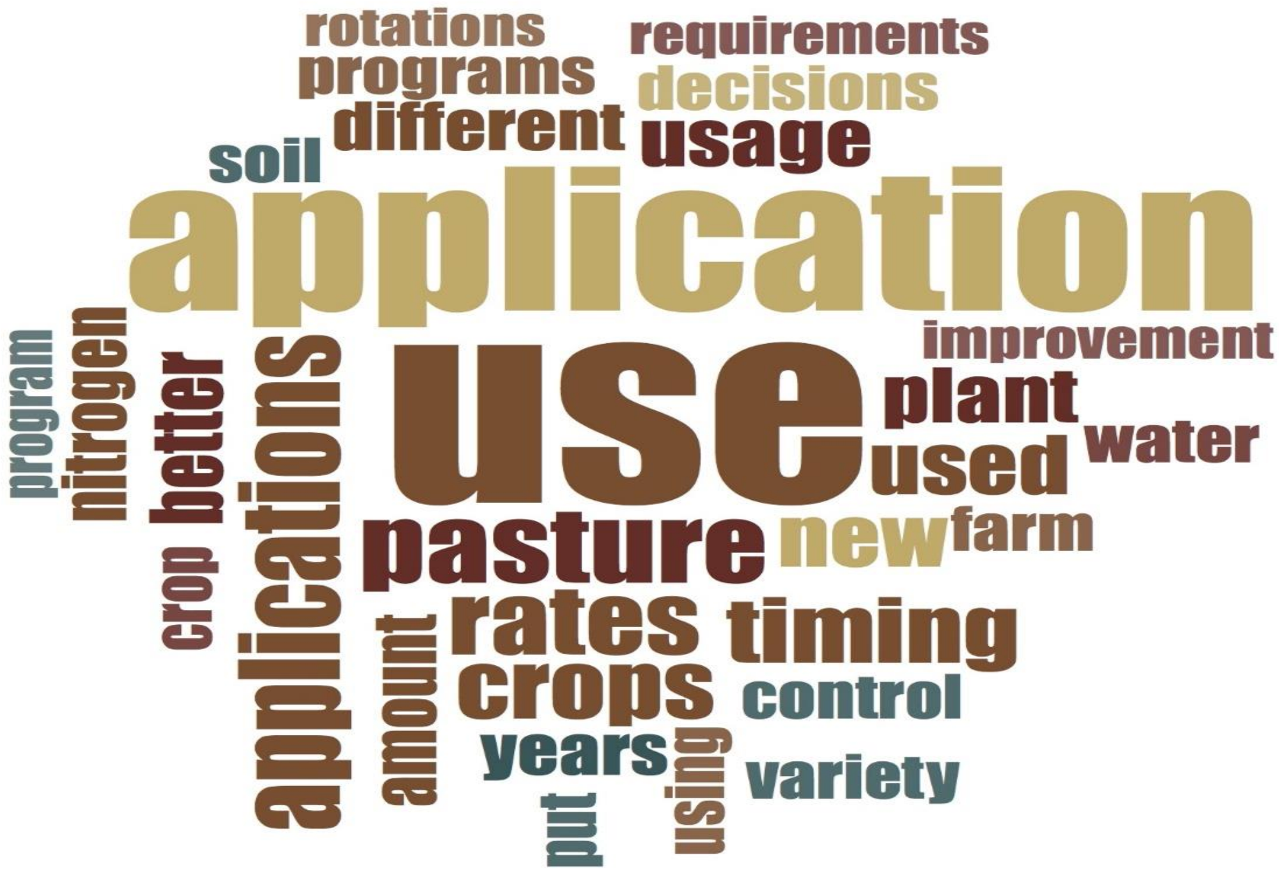
Changes as a result of information, advice support received from the main source

Between 78-82% (n=954 farmers) of farmers described changes related to....



(size of category related to number of comments)

Practice change: Fertiliser programs



Net increase in use of information, advice and support expected (five years)

Expected use of services overall and by main service used

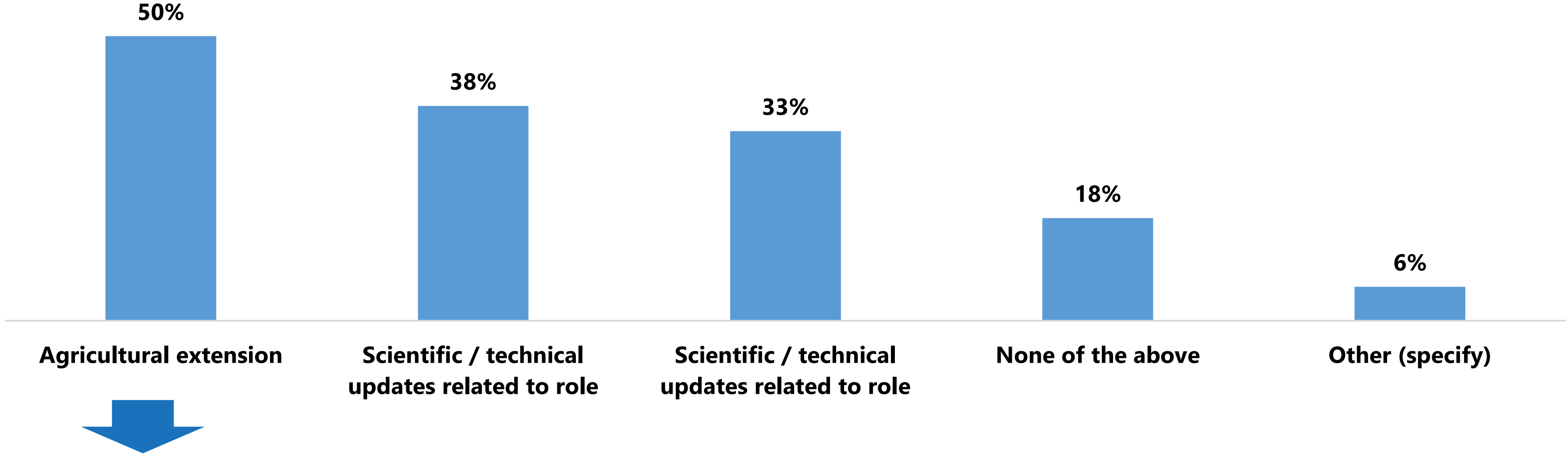
	Government (n=92)	R&D corporations (n=152)	Product re-sellers / farm input suppliers (n=194)	Independent (fee-for-service) advisers (n=305)	Farmer-owned information, advice and support organisations (n=126)	Processing companies you supply (n=60)	Other (n=49)	Total
More (a lot / a little more)	26%	39%	21%	37%	34%	35%	33%	32%
Same	53%	54%	71%	54%	52%	60%	46%	57%
Less (a lot / a little less	21%	7%	8%	9%	14%	5%	21%	11%

Q.16. Still thinking about your experiences with [INSERT SOURCE FROM Q11], in the next five years or so, do you expect your use of information, support, or advice to be…
Base: All respondents with a main source

*= statistically significant difference *=low base size*

Half of advisers had received PD/training on agricultural extension in the past 12 months

Received professional development or training in the past 12 months:



Industry organisation / association	Non-governmental organisation / not for profit	Private organisation - Commercial	Public organisation (government)	Private organisation - Consulting	Farmer-based organisation	Sole Operator	Total
73%	59%	53%	48%	48%	43%	27%	50%

Q21 - Professional development or training in the last 12 months?
Base: All respondents (n=655)

*= statistically significant difference *=low base size*

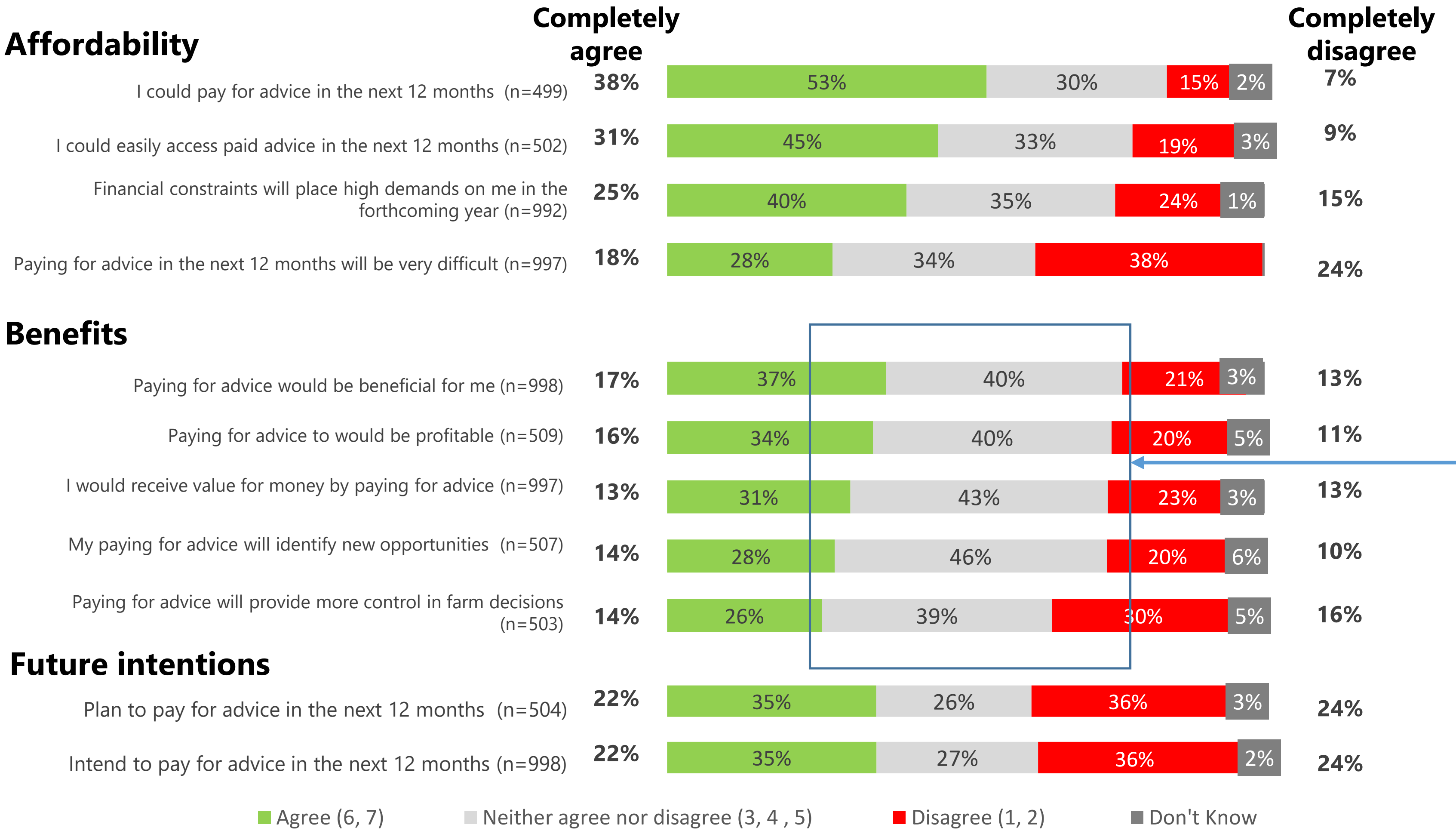
Key findings

2. Constraints to the use of private advisory services.

Questions you may be asking:

- What can the private-sector do?
- Is their competition from forms of advice (government, RDCs) or room for all?

Attitudes towards the benefits of paying for advice were polarised



'Neither agree or disagree' that paying for advice is:

- **Beneficial**
- **Profitable**
- **Value for money**
- **Or will help identify Opportunities**

Not really competition – appears to be room for all

Information, advice or support provided – top 5 main areas by adviser type

	Private organisation - Consulting (n=235)	Private organisation - Commercial (n=144)	Public organisation (government) (n=117)	Industry organisation / association (n=30)	Sole operator (n=41)	Non-governmental organisation / not for profit (n=34)	Farmer-based organisation (n=30)
1st	Livestock production 27%	Crop production 32%	Environment / Natural resource management 23%	No main topic / all equal 29%	Livestock production 22%	No main topic / all equal 21%	No main topic / all equal 27%
2nd	Animal health 15%	Livestock production 21%	Livestock production 15%	Livestock production 16%	No main topic / all equal 20%	Environment / Natural resource management 15%	Research 20%
3rd	No main topic / all equal 14%	No main topic / all equal 10%	No main topic / all equal 15%	Crop production 13%	Animal health 17%	Crop production 12%	Livestock production 17%
4th	Farm business management 11%	Crop/livestock marketing, sales, processing 8%	Research 14%	Animal health 9%	Crop production 15%	Farm business management 12%	Whole-farm management / planning 10%
5th	Crop production 10%	Animal health 6%	Whole-farm management / planning 7%	Research 9%	Crop/livestock marketing 7%	Finance / banking / accounting services 12%	Crop/livestock marketing 7%

Q.16 - What is the main information, advice or support service provided by your organisation?
Base: All Employee and Sole Operators – see table
*X% / X% = statistically significant difference – higher /lower *=low base size*
** National Farmer Survey.

But currently: People in public and industry organisations are more likely to be delivering training or extension programs / projects than the private sector (exception – sole operators)

Public organisation (government) (n=105)	Industry organisation / association (n=30)	Non-governmental organisation / not for profit (n=28*)	Farmer-based organisation (n=21*)	Sole Operator (n=41)	Private organisation – Commercial (n=87)	Private organisation - Consulting (n=46)
85% ⬆	77%	68%	62%	51%	40% ⬇	39% ⬇

Competition? or the private sector not being considered or unknown?

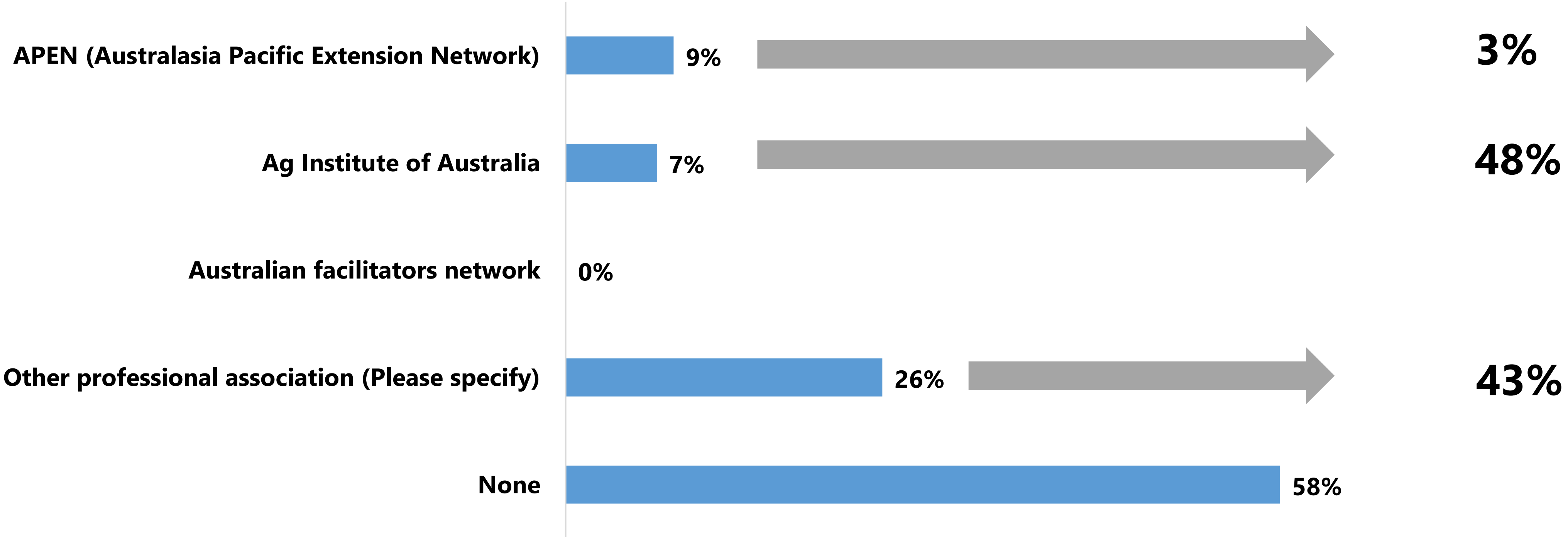
Q35 - In the last 12 months have you been directly engaged to deliver training or extension programs or projects for farmers by government or industry?
Base: All Employee and Sole Operators (n=365)

⬆⬇ = *statistically significant difference* *=*low base size*

Could low membership with a professional association be a concern to industry/government?

Membership with a professional association:

Certified through association:



Q53 - Are you a member of a professional association in your work role?
Q54 - Are you certified or accredited through this association?
Base: All Employees and Sole Operators (n=365)
* Caution – small base.

Key findings

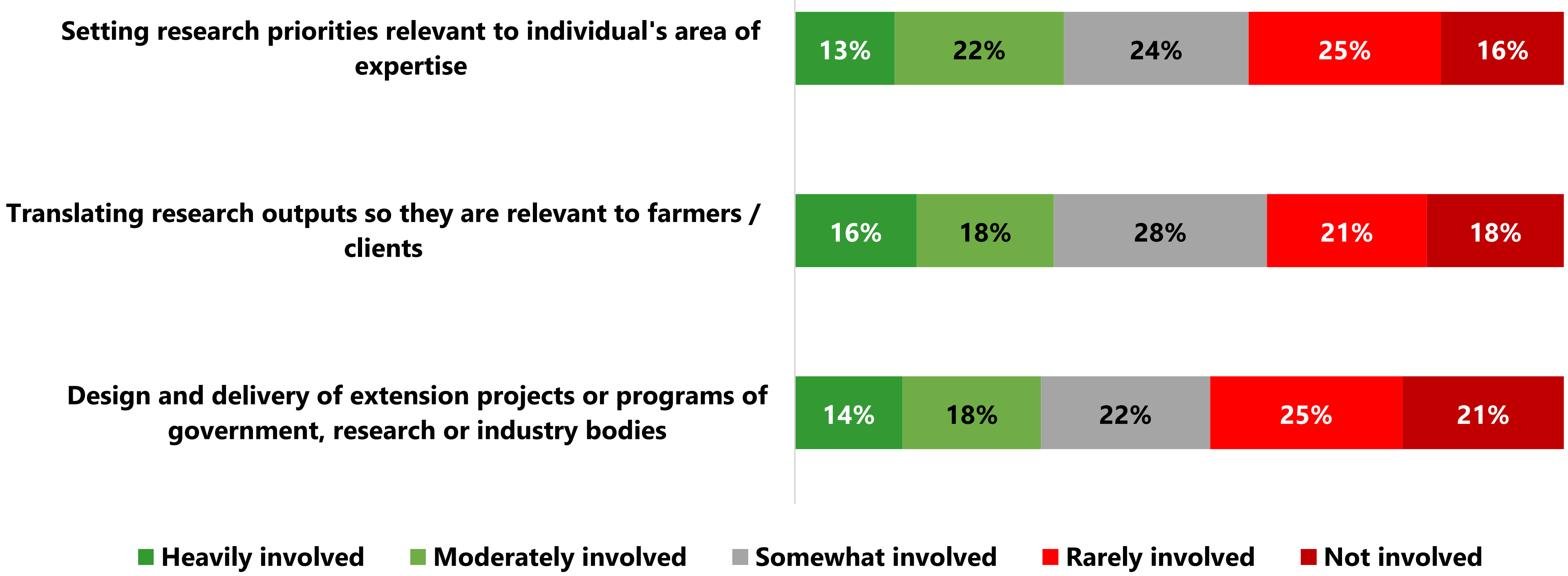
3. **Gaps in policy & opportunities to up-scale participation and reach with the private sector**

Questions you may be asking:

- Are there industry/policy responses needed?

Approx. 45% of advisers were rarely or not involved in the agricultural research, development and extension systems

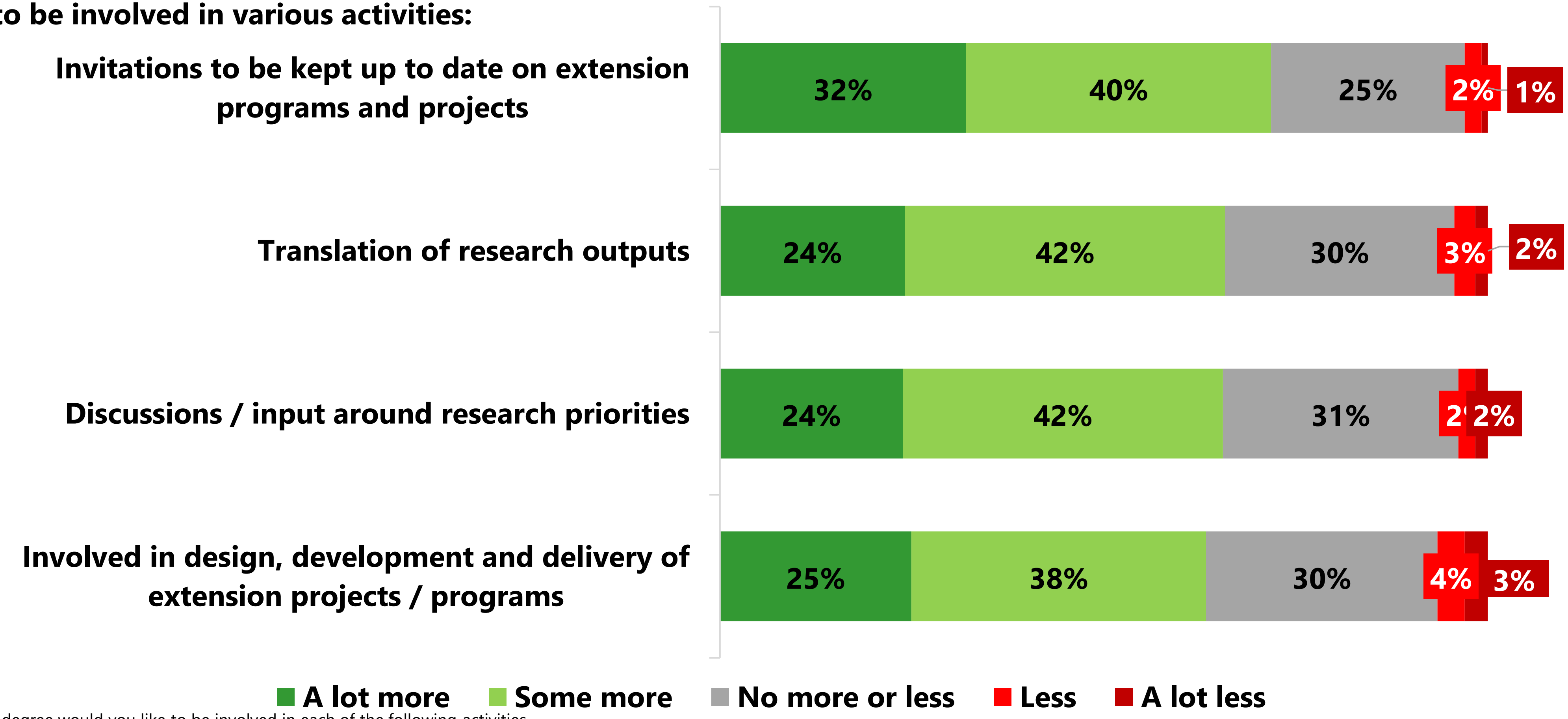
Extent of involvement with Australia's agricultural research, development and extension system (n=365)



Q36 - To what extent are you involved or consulted in setting research priorities related to your area of expertise (i.e. in national, regional or industry research priorities)?
Q38 - To what extent are you currently involved with, or consulted by, agricultural industry, government or research bodies in translating research outputs so they are relevant to farmers / your clients?
Q39 - To what extent are you currently involved with, or consulted in the design, development or delivery of extension projects or programs of government, research or industry bodies?
Base: All Employee and Sole Operators (n=365)

But they want to be: approx. 72% desire a lot/some more involvement with agricultural research, development and extension

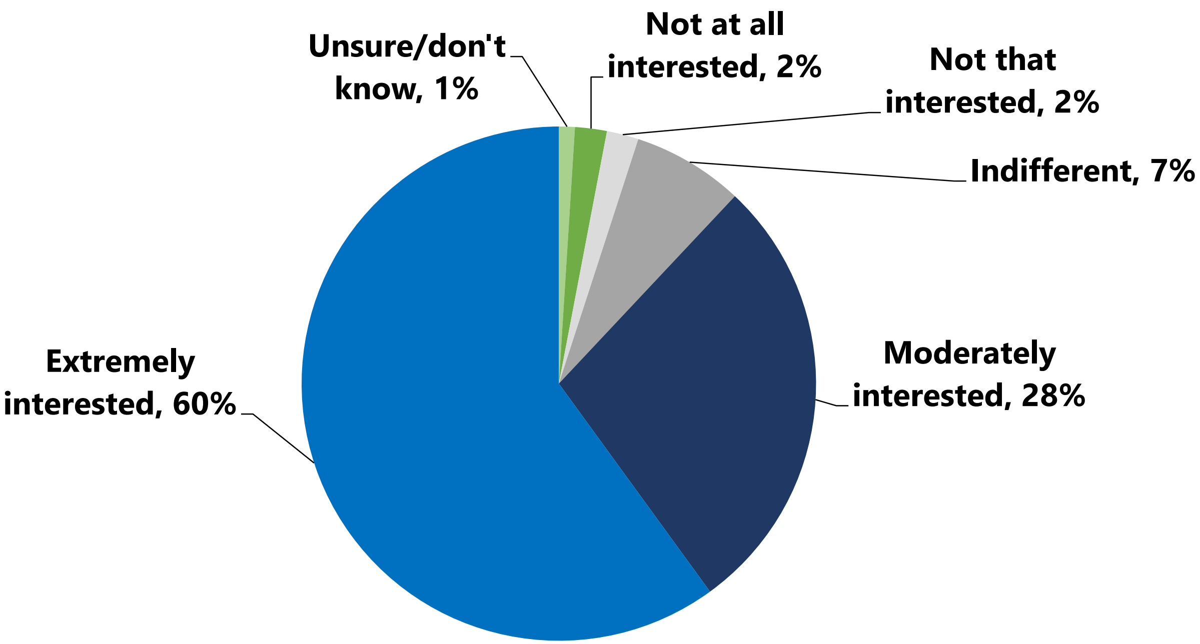
Desire to be involved in various activities:



Q40 - And to what degree would you like to be involved in each of the following activities
Base: All Employee and Sole Operators (n=365)

Business owners / leads had an interest in forming partnerships to have a greater role.

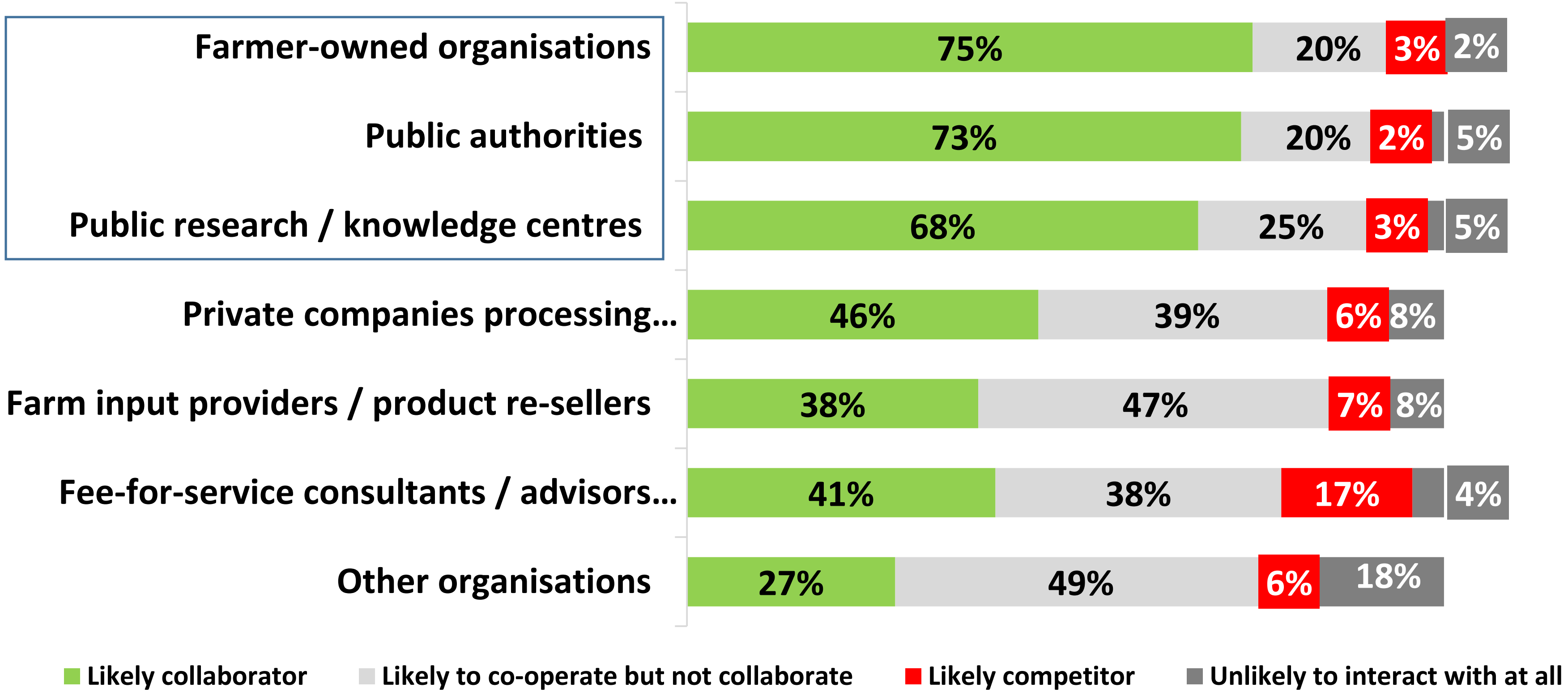
Interest in opportunities to partner with agricultural research, development and extension bodies to support farm productivity:



Q43 - How interested is your organisation in opportunities to partner with agricultural research, development and extension bodies to support farm productivity?
Base: All Owner / Leads (n=290)

The majority of advisers were willing to either co-operate or collaborate with farmer and public organisations.

People and organisations most likely to collaborate or co-operate with in the provision of extension services to farmers:

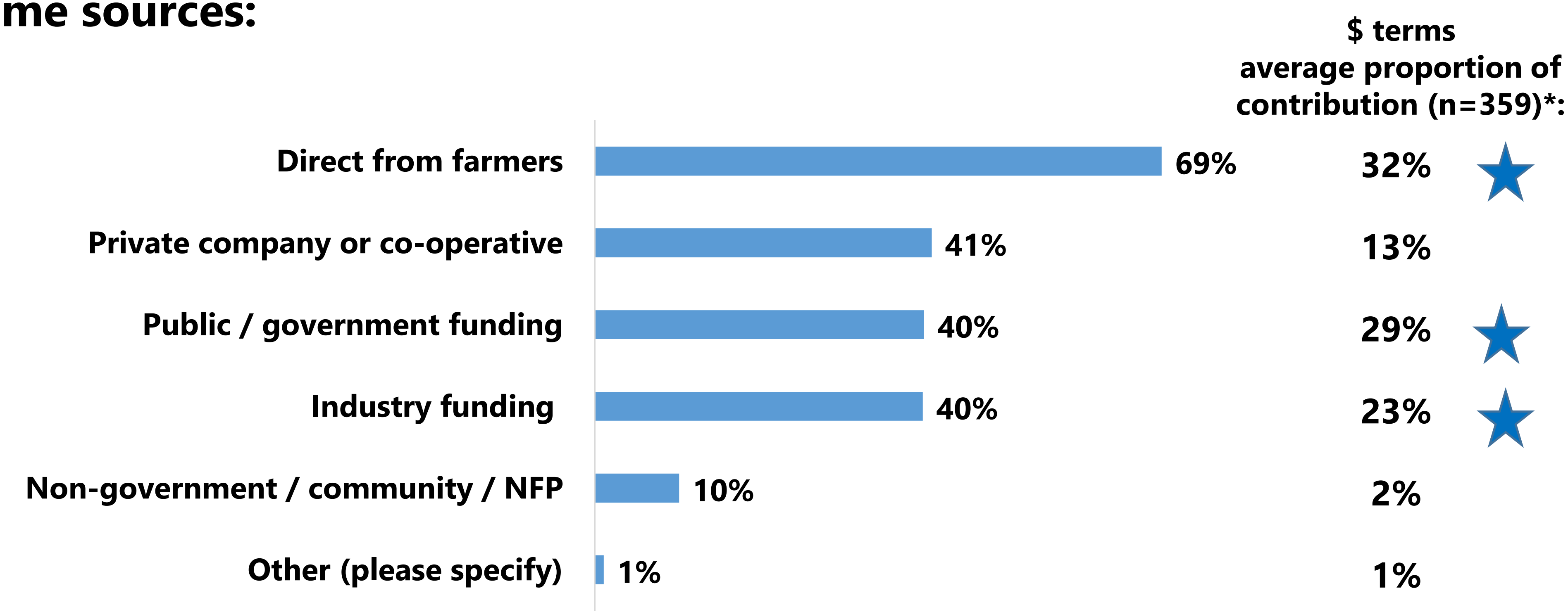


However, advisers were polarised when it came to collaborating with Farm input providers / product re-sellers, Independent (fee-for-service) advisers and private companies.

Q41 - People and organisations you would be most likely to collaborate or co-operate with in the provision of extension services to farmers *Online Only
Base: All Employee and Sole Operators (n=265)

Is the balance of public-private investment effective? (Currently about 50:50)

Income sources:



Q.11 - Which of the following income streams/sources does your organisation currently draw on in Australia?
Base: All respondents (n=655). *Online only (n=359).
Q.12 - In dollar terms, what proportion do each of these income streams contribute to your business? *Online only
Base: All respondents (n=359).

How to grasp the opportunities individually and collectively?

Demand is there. Services are *mostly* ready, willing, able.

Need to:

- Increase real and perceived value of advice and support issues of access amongst key groups
- Increase private-sector involvement in
  - priority setting
  - research translation
  - product/service development
- Engage a wide range of professional associations and support PD in extension
- Make new (government/industry) policies and establish suitable governance to:
  - Help transition to a more co-ordinated/collaborative advisory and extension system
  - Harness the real strength of the collective effort **(this is the way returns from RD&E are realised on-farm)**

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- Quantum Market Research: Survey administration and reporting
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