



Stakeholder Survey
September 2025

SUMMARY REPORT

Background

The Cotton Research and Development Corporation (CRDC) delivers outcomes in cotton research, development and extension (RD&E) for the Australian cotton industry. A partnership between the Commonwealth Government and cotton growers, CRDC exists to grow the sustainable future of cotton through innovation with impact.

CRDC's Strategic RD&E Plan for 2023-28 is Clever Cotton.

Clever Cotton sets out CRDC's vision for a sophisticated, prosperous and sustainable Australian cotton industry that is strongly connected to its value chain.

The plan is helping the industry thrive by increasing productivity and profitability, sustainably addressing the impacts of climate change, and improving decision-making using data and digital technologies.

The plan identifies three pillars of investment, with each pillar supported by three key investment themes as shown below:

Paddock

- + Data-driven decisions
- + Adaptive systems
- + Connected market intelligence

People

- + Design and innovation
- + Leadership and capacity
- + Adoption and impact

Planet

- + Natural capital
- + Carbon
- + Circular economy

Ensuring that there are strong and vibrant partnerships between CRDC and their key stakeholders is important.

Measures of the health of these partnerships have been undertaken in 2016, 2019, and in 2022. CRDC has identified a need for a further measure of the strength and health of the partnership between CRDC and these stakeholders.

This report summarises the results of the 2025 CRDC Stakeholder Survey.

About the research

To better understand the success of its engagement and work with its stakeholders, CRDC engaged Intuitive Solutions to design and implement a program of research to capture and collate the experiences of CRDC's stakeholders in their dealings with the organisation.

This feedback process covered topics including:

- stakeholder organisational details, to enable profiling and reporting of results for key stakeholder segments;
- fundamentals of the partnership with CRDC;
- outcomes and dividends from the partnership with CRDC;
- empathy and alignment between stakeholders;
- how CRDC does things;
- comparison of CRDC to other partners that engage with their organisation;
- RD&E and sustainability initiatives;
- CRDC's performance in terms of their 5 year strategic plan; and
- overall satisfaction with the partnership, engagement and trust in the CRDC.

To reflect the nature of the nature of the different partnerships across the stakeholder audience, a mixed mode was implemented, as follows:

- one on one telephone interviews (approximately 25 to 30 minutes) with CRDC's key stakeholders; and
- an online (10 minute) survey of other important stakeholders.

HEADLINE METRICS

- ✓ overall satisfaction with the CRDC partnership with your organisation
- ✓ satisfied with the way CRDC is engaging with you in your role
- ✓ satisfaction that CRDC is an organisation you can trust



UNPACKING THE PARTNERSHIP EXPERIENCE

- ✓ fundamentals of the partnership
- ✓ outcomes and dividends from the partnership
- ✓ empathy & alignment
- ✓ how CRDC does things
- ✓ comparisons to other partners that engage with their organisation
- ✓ perceptions around success on RD&E and sustainability
- ✓ open mic responses

The stakeholder feedback exercise

CRDC invited its key stakeholders to provide feedback on the health of the partnership, to identify what was working effectively, and also highlight opportunities for strengthening the partnership. This feedback exercise was undertaken across July and August 2025, with previous research undertaken September-October 2022, December 2019-January 2020, and September-November 2016.

The feedback was collected through one of two pathways:

- o a total of 65 stakeholders provided feedback by completing the online survey. Feedback was received from Government, industry, grower representative organisations and research organisations; together with
- o contributions from eleven key stakeholders who participated in a one-on-one telephone interviews.

The design allowed for both quantitative satisfaction ratings to be collected in addition to open-ended feedback on the issues raised and discussed during the online survey and telephone interviews. This key point summary provides a high-level overview of the feedback provided.

We note that the online survey in 2025 attracted 65 responses from an available invitation list of some 102 stakeholders (representing a 64% response rate). This was a pleasing result and a slightly stronger response rate to what was achieved in 2022 (60 responses from 101 stakeholders, response rate of 59%).

The areas explored throughout the survey sought stakeholder's perceptions of the engagement and partnership with CRDC. Given the small sample size and nature of the questions, some caution should be exercised in interpreting these results.



A note on comparisons to previous research

The Stakeholder Survey is sent to around 100 key stakeholders of CRDC during each research period. Naturally, these stakeholders represent various audience segments that work with CRDC and the cotton industry more broadly.

The sample file provided by CRDC labels each stakeholder into one or possibly two audience segments (as shown on the right).

Whilst the make-up of the broader sample remains roughly similar from 2016 through to 2025, those who go on to complete the survey may present a different audience segment make-up to those presented in previous years of research.

The tables on the right list the audience segments of those who have complete the survey in each of the four research periods, both by count of survey completes and also proportion of representation of the total number of completes.

Please note that the proportions will add to over 100% due to stakeholders having possibly two audience segments applied to them.

The following report presents the 2025 results with any like-for-like comparisons to research undertaken in 2022, 2019 and 2016.

Comparisons of 2025 results to previous research should be considered with these differences in audience segment make-up in mind.

The impact of COVID19

We also note that the 2019 Stakeholder Survey was undertaken just months before the outbreak of COVID-19 in Australia. The environment for stakeholder engagement then was very different to the environment for the 2016, 2022 and 2025 Stakeholder Surveys.

Consideration of this very different operating environment should also be considered when interpreting difference in the 2019 results to all others.

Audience Segment (survey completes)	2025	2022	2019	2016
Ag industry	1	7	8	18
Cotton industry	9	10		
Commercial partner	3	4	-	-
Extension program partner	7	5	1	3
Government	8	9	7	9
Industry representation	16	13	15	15
Other Ag	6	6	2	1
Research partner	36	38		
Universities	10	9	31	50
TOTAL	65	60	43	59

Audience Segment (survey completes)	2025	2022	2019	2016
Ag industry	2%	12%	19%	31%
Cotton industry	14%	17%		
Commercial partner	5%	7%	-	-
Extension program partner	11%	8%	2%	5%
Government	12%	15%	16%	15%
Industry representation	25%	22%	35%	25%
Other Ag	9%	10%	5%	2%
Research partner	55%	63%		
Universities	15%	15%	72%	85%
TOTAL	65	60	43	59

Where have key results changed from previous research?

	Question	Measure	2025 Result	2022 Result	2019 Result	2016 Result
HEADLINE METRICS	 Thinking of everything we have asked so far, overall how satisfied are you with the CRDC partnership with your organisation?	Mean satisfaction rating (0-10) (excluding "Unsure" answers)	8.2	8.2	8.4	8.2
	 How satisfied are you with the way CRDC is engaging with you?	Mean satisfaction rating (0-10) (excluding "Unsure" answers)	8.1	8.0	8.3	8.3
	 How satisfied are you that CRDC is an organisation you can trust?	Mean satisfaction rating (0-10) (excluding "Unsure" answers)	8.8	8.9	8.9	8.7
STAKEHOLDER PERCEPTIONS OF CRDC	 How successful do you think CRDC has been in the following: Investing in RD&E to facilitate the development and uptake of digital tech in cotton	Mean successful rating (0-10) (excluding "Unsure" answers)	7.2	7.7	7.3	n/a
	 How successful do you think CRDC has been in the following: Investing in RD&E to improve the cotton industry's sustainability	Mean successful rating (0-10) (excluding "Unsure" answers)	8.2	8.4	8.5	n/a
	 How successful do you think CRDC has been in the following: Supporting industry in the development of the Sustainability Framework	Mean successful rating (0-10) (excluding "Unsure" answers)	8.2	8.5	n/a	n/a
	 How successful do you think CRDC has been in the following: Supporting industry in the management and reporting of environmental and social impacts	Mean successful rating (0-10) (excluding "Unsure" answers)	8.0	n/a	n/a	n/a
ENGAGEMENT	 Thinking of how the different partners engage with your organisation, how does CRDC compare in regard to: The effectiveness of its engagement	% CRDC is better + % CRDC is much better	71%	n/a	n/a	n/a

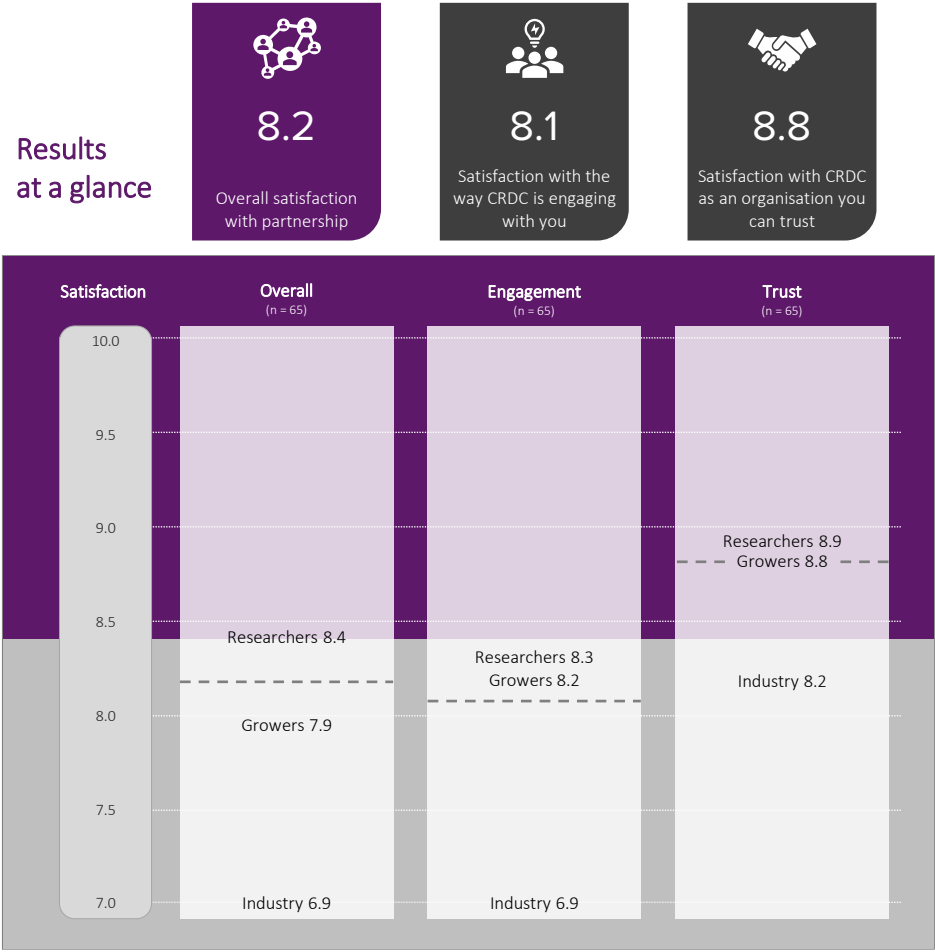
The stakeholder ratings

The feedback from the online survey of CRDC stakeholders has shown that:

- CRDC has sustained strong results across each of the three headline organisational performance metrics measured in the online survey (as shown opposite).
- Again in 2025, stakeholders reported a high level of satisfaction in the trust of CRDC. A collective rating of 8.8 (with almost one in two – 45% – rating 10 out of 10 on this trust measure) highlights the strong foundation the current partnerships are built on. While this provides no guarantee of satisfaction with the partnership and engagement with CRDC, it is an important foundation from which to build.
- Overall satisfaction with the partnership (across all stakeholders) was again strong with a rating of 8.2, no change on the 2022 result. This rating is supported by over two in three (69%) who rated at an 8 or above but dampened by a small number of stakeholders (8%) who rated below a 6. The report explores the feedback and where there may be opportunities to further strengthen satisfaction.
- In the 2025 survey, feedback across the various stakeholder segments shifted slightly from results in 2022, with the Researchers segment (making up n = 36 of the 65 respondents) rating slightly more positively (on average up 0.3 across the three headline metrics). Conversely, the Industry segment declined by 1.2 points on average across the three headline metrics – however, given their smaller representation across the wider stakeholder population and the reduction of organisations within this segment invited to participate in the 2025 survey, this decline has not had a significant effect on the overall measures.

It is important that CRDC also acknowledge and respond to the feedback provided by stakeholders.

Results at a glance



What's working

The ratings and feedback provided in the 2025 Stakeholder Survey highlighted the perceived strengths of the current engagement and partnership with stakeholders. They included:

- ✓ CRDC has been successful in building and sustaining strong partnerships with its key stakeholders.

Feedback from interviews with key stakeholders has reaffirmed the strength and resilience of their partnership with CRDC.

While some operational or strategic issues have, at times, introduced moments of tension, the consensus is that the relationship remains fundamentally strong, collaborative, and productive.

This positive assessment is consistent with findings from the previous two waves of stakeholder research conducted over the past six years. It reflects CRDC's commitment to building trust, maintaining open lines of communication, and fostering long-term engagement with its stakeholders.

The continuity of this sentiment across multiple research cycles highlights CRDC's success in cultivating enduring relationships that can withstand challenges and adapt to evolving industry needs. Stakeholders continue to value the partnership, recognising CRDC as a reliable and responsive collaborator and partner.

What did stakeholders identify as the ingredients contributing to the success of the engagement?

There were several contributing factors as to why stakeholders agreed the partnership was CRDC was strong. They included:

- Direct personal relationships that underpinned the working relationship. The value of establishing and sustaining these personal relationship was seen as a clear point of difference for CRDC.
- Willingness to collaborate – with partners and with other RDCs.
- Regular and consistent communication – integration of formal and informal conversations.
- Stability in the key people; there was an acknowledgement of change over time, but agreement that CRDC had managed to maintain stability in the key personnel and corporate knowledge.
- Being frank in the discussions in bringing issues likely to impact the working relationships to the table for early discussion and resolution.

There was also reference during the phone interviews to some of the key mechanics of the partnership, including that CRDC were

- accessible;
- responsive;
- do what they say they would do;
- pro-active; and
- demonstrated an understanding of the operating environment and an empathy for the needs of partners.

The discussion highlighted many of the positive aspect of the partnership while, at the same time, acknowledging that there are 'ups and downs' in any relationship.

- ✓ Stakeholders acknowledged CRDC as having stronger engagement than other RDCs.

Stakeholders consistently recognised CRDC as demonstrating stronger engagement compared to other RDCs. While the notion of being 'better' is inherently subjective — particularly given the varying scale and complexity across sectors — the feedback revealed a clear appreciation for CRDC's organisational strengths.

Stakeholders highlighted CRDC's reputation as an organised, proactive, and responsive entity that works effectively with other industry organisations. These attributes were frequently cited as contributing to CRDC being perceived as 'easy to deal with,' a sentiment that was consistently echoed across stakeholder conversations.

Such organisational qualities are not only valued but are considered essential in fostering productive and enduring partnerships. CRDC's ability to maintain clarity, responsiveness, and collaboration positions it as a trusted and effective partner within the industry.

- ✓ Value step-up identified for '*staying in your lane*'

Stakeholders have recognised and expressed appreciation for CRDC's more recent efforts to clearly define its core roles and responsibilities within the cotton industry and within the broader research and development ecosystem.

This clarity has been interpreted as a more disciplined and focused organisational approach, reducing ambiguity around CRDC's mandate and operational boundaries.

By articulating its strategic remit more precisely, CRDC is now perceived as more likely to remain within its designated scope—avoiding unnecessary overlap with the functions of partner organisations or industry bodies. This shift has enhanced stakeholder confidence in CRDC's governance and operational integrity, while also promoting more effective collaboration by ensuring that each entity can contribute within its area of expertise.

Ultimately, this strengthened clarity supports more efficient resource utilisation, reduces duplication of effort, and enables CRDC to be seen to deliver greater value through targeted research investments and outcome-driven initiatives.

- ✓ Clarity sought about the posture with some long-term research providers

Several research stakeholders noted that shifts in their own organisational priorities have contributed to a disruption in their partnerships with CRDC. As previously identified in the 2022 research, these changes — particularly the adoption of more commercially driven models and a stronger focus on return on investment — were expected to impact the nature of collaboration with CRDC.

While stakeholders acknowledged that such changes were both inevitable and, in the short term, unlikely to be reversed, there was a shared sense of disappointment regarding the current state of engagement.

From their perspective, CRDC has not maintained the same level of proactive outreach or collaborative exploration that previously characterised the relationship.

Importantly, stakeholders recognised that the responsibility for maintaining strong partnerships is mutual. The current disconnect was not attributed solely to CRDC, but rather seen as a shared challenge requiring renewed effort from both sides to re-establish alignment and rebuild momentum in the partnership.

- ✓ Mixed views on the traction that has been achieved from CRDC's investment in and focus on sustainability

Stakeholder feedback revealed a range of perspectives regarding the impact of CRDC's investment and strategic focus on sustainability.

While some stakeholders acknowledged progress and recognised CRDC's commitment to sustainability as a positive and necessary direction, others expressed uncertainty about recognition by growers of the tangible outcomes achieved to date.

This divergence in views suggests that, although sustainability is broadly supported as a strategic priority, the perceived effectiveness and visibility of CRDC's efforts vary across the stakeholder group.

For some, the initiatives have demonstrated meaningful traction; for others, the connection between investment and measurable impact and priorities remains unclear.

The feedback highlights an opportunity for CRDC to further communicate its sustainability outcomes, clarify its strategic intent, and engage stakeholders in shaping future directions to ensure alignment and shared understanding of progress.

✓ Extend reach across the partner organisations

The feedback suggests that CRDC could derive additional strategic value by deepening its engagement with senior leadership across partner organisations.

Stakeholders suggested that establishing relationships at higher organisational levels would bring visibility to the current CRDC investment programs and priorities and enable CRDC to align more closely with the strategic priorities and long-term visions of its partners.

This enhanced connectivity can facilitate more effective collaboration, foster mutual accountability, and improve the coordination of joint initiatives.

Engaging senior levels of stakeholder organisations may also open pathways for more informed and timely decision-making, particularly in areas requiring cross-organisational commitment or resource allocation. It can help CRDC gain clearer insights into emerging industry challenges and opportunities, ensuring that research investments are both relevant and impactful.

Moreover, such engagement can strengthen trust and visibility, positioning CRDC as a proactive and strategic partner. This, in turn, may lead to increased support for innovation, broader dissemination of research outcomes, and more agile responses to evolving market and environmental conditions.

✓ Balancing bureaucracy with agility

Stakeholders affirmed that robust project governance is a fundamental requirement for all Research and Development Corporations (RDCs).

Nonetheless, feedback received during consultations suggested that CRDC may benefit from reassessing the equilibrium between governance protocols and the tangible value derived from certain bureaucratic procedures.

This commentary, in part, reflected a desire for enhanced agility in decision-making processes and a more expedient transition from research initiation to the delivery of outcomes. Stakeholders emphasised the growing imperative for organisations to remain adaptive and responsive to evolving customer expectations and market dynamics.

It is evident that a judicious and well-supported balance must be established and maintained.

Research Program

The research program was designed to obtain feedback on the health of CRDC's partnership with their stakeholders. The research is aimed to provide some key indicator metrics together with some diagnostics that will provide insights to support a program that will deliver stronger partnerships with these key stakeholders.

Target Audience

The target respondents for this research were identified by CRDC. A listing of the stakeholder organisations and the individual representatives that were in scope for the research were provided to Intuitive Solutions by CRDC.

Methodology

A total of n = 11 one on one telephone interviews were undertaken with key stakeholders. These interviews were conducted across the period of 1st August 2025 to 18th August 2025.

For the online survey, a list of stakeholders was provided including the key contact details. The program initially targeted a total of n = 102 identified stakeholders. A total of n = 65 surveys were completed with key stakeholders. This represents a 64% response rate. The response to the online survey included stakeholders across the following Audience Segments (stakeholders could be in more than one segment):

Audience Segment	People approached	Survey participants	Response Rate (%)
Ag industry	2	1	50%
Commercial partner	8	3	38%
Cotton industry	10	9	90%
Extension program partner	7	7	100%
Government	11	8	73%
Industry representation	35	16	46%
Other Ag	8	6	75%
Research partner	45	36	80%
Universities	11	10	91%
TOTAL	102	65	64%

Questionnaire

The online survey and face to face discussion guide explored issues on the following topics:

- o fundamentals of the partnership;
- o outcomes and dividends from the partnership;
- o empathy & alignment;
- o how CRDC do things;
- o comparisons to other partners than engage with their organisation;
- o perceptions around success on RD&E and sustainability;
- o key metrics; and
- o other feedback.

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to accomplish this.

Want more information?

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