BASF Farm Perspectives Study

Summary of key findings

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Synovate GmbH
The Survey

In June and July 2011 Synovate conducted the survey in six sample countries on four continents: Germany, France, Spain, Brazil, India and the USA.

Synovate interviewed 300 farmers per country by phone. Farmers in India, however, were interviewed face-to-face. The aim was to representatively capture the farm structures in terms of size, region, crop and production method in each country.

Synovate also interviewed consumers in all countries. This took place by online interviews using Synovate's online panels. The sample size was 1,000 interviews per country. Again, the aim was also to represent all consumers. Due to the online interviewing method the survey covers online households only.

The interviews lasted, on average, 30 minutes for farmers and 20 minutes for consumers.

The survey is able to provide many more and deeper country- and segment-specific insights. This summary is only meant to be a cross-country overview.

The Results

Farmers' and farming's image

1. “Farming is a vocation”

The first finding of the survey is that both farmers and consumers alike perceive the farming profession as a vocation. Farming is not a job that can be compared other service jobs, which are more transactional. Rather, farming is a calling. Farmers understand their profession in three essential dimensions: a) providing nourishment, b) supporting rural culture and – particularly – c) stewarding the (or their) land. As an example, around 90% of farmers in Germany agree to "I regard myself as a steward of the land". The same is true for farmers in the U.S., in India and Brazil. Farmers in Spain and France describe themselves slightly less so (70-80%). Thus farming entails both ecological as well as social dimensions. This shows that farmers take their responsibility for society and the environment seriously and do not merely understand farming as a way to earn money.

In almost all countries, except the USA and Brazil, the business dimension of farming is significantly weaker than the vocational aspects.

Many consumers do share farmers' self image to some extent: They do regard farming as more than a job (i.e. accompanied by a social component). However, a much lower share of consumers, generally 20-30% in each country, sees farmers as "stewards of the land". Instead, consumers regard farmers particularly as providers (e.g. 80% in Germany). Consumers underpin this point of view by criticizing farmers when it comes to environmental topics. The statement, "Farmers are often to blame for environmental problems", resonated with some consumers, particularly those in India, France and Brazil at around 40% while consumers in Germany and the U.S. were around one quarter.
Although farmers’ self-image or identity was largely seen as positive, the way they perceive their own position in the society is quite negative. Only a minority (~20% in Germany, France, Spain, Brazil, 33% in the U.S.) is convinced that they as farmers are “respected by society”. The majority, however, is either somewhat or completely convinced that farmers are not respected. In France and Spain this finding is further supported by farmers’ noticeably low levels of satisfaction (53% for France and 63% for Spain).

2. “21st Century Challenge: Feed the world population”

Farmers and consumers agree on the overriding task for farming. Farming’s main challenge is to feed the entire, yet growing world population and to secure the global food supply for the future. Around 80% of all farmers in Germany, Brazil and India agree to this statement. The respective share in the U.S. is 70%. Spain and France are behind with 60%.

There is less agreement between farmers and consumers on how to feed the world population, especially when it comes to agricultural technologies. Agreement that securing the food supply will require plant biotechnology was strongest among farmers and consumers in countries with high adoption of genetically-modified crops, such as India (76% of farmers and 62% of consumers), Brazil (78% and 29%) and the USA (53% and 25%).

The relationship between consumers and farmers

In addition to the above-mentioned areas, there are many more aspects and topics where consumers and farmers are of the same opinion.

3. “Consumer interest high, understanding low”

Consumers, although interested in farming, admit that their knowledge of farming is limited. Farmers, on the other hand, know and accept that consumers, as their clients, may have only limited knowledge.

Farmers also recognize the worries many consumers have. Two thirds to three quarters of all consumers in the U.S., France and Brazil “are concerned about the food they eat”. Spanish and German consumers mention concerns to a lesser degree (50 resp. 33%). If and to what degree consumers assign their concerns to farming or farmers directly, is not entirely clear. Consumers’ doubts partly relate to farming, partly industrial processing of food.

4. “Farmers take consumers’ concerns about food seriously”

Nevertheless, farmers take consumers' qualms seriously. Many farmers want to address these concerns. An interesting result in this context is that farmers in countries where fewer consumers have concerns (Germany, Spain) seem to know that: fewer farmers want to meet the fewer doubts of their consumers. However, U.S. and French farmers react the other way round and do not meet the high levels of concerns adequately.

The concern level of consumers seems to be linked directly to consumers' satisfaction with farming. Many – too many – consumers are “not satisfied with farming in their countries”– 40% or more express dissatisfaction. Exceptions are consumers in Germany and the U.S. (ca. 30%).
5. “Price an obstacle between farmers and consumers on environment”

Food prices could be identified as an obstacle between farmers and consumers. Farmers are convinced that consumers request “prices that are too low”. Farmers also complain that consumers are not willing to pay more for food produced in an especially environmentally friendly way. With regard to consumers this assumption is partly confirmed: A mentionable share of consumers (ca. 50% in Germany, US, Spain and France) are not willing to pay more, even if their requirements are fulfilled. On the other hand, some consumers appear to be willing to pay more. The latter group could be characterized as committed consumers and their willingness to pay more an expression in favor of farming or, perhaps, the farmers themselves. This group is even bigger in Brazil and India (65% and 78% respectively) – potentially a sign of both commitment to and the wish for access to better food.

Of course, consumers are not a homogeneous group. They not only differ across countries, but – maybe even to a stronger degree – within the countries.

The relationship between farmers and industry

6. “Farmers request more support from consumers and industry”

Farmers say that consumers should do more to inform themselves about agricultural topics and apply this knowledge to their purchasing decisions, especially where the social benefits of farming are concerned. Nearly all farmers in all countries, from 85% in the USA to 72% in India, agree that consumers can influence agricultural issues on a high level through their purchasing decisions.

Farmers explicitly request support from the chemical industry as well. The two top-ranking requests are 1) more environmentally friendly products and 2) better represent farmers’ interests publically. The overwhelming majority of farmers is very open to help from the chemical industry, especially when it comes to balancing their own perceived weaknesses concerning their reputation.