Farming, the biggest job on earth
Farm Perspectives Study, 2014 – Main findings

‘Farmers fulfill a necessary function in society’

... say 92.6% of all farmers
... say 90.9% of all consumers
globally

Consumers care about agriculture

80.6% of consumers say they care about sustainability in agriculture
75.0% of consumers say they understand the importance of farmers in securing the food supply
69.9% of consumers say they care about farmers’ problems
68.3% of consumers say they are willing to pay higher prices for food produced in an environmentally friendly way

Farmers care for the land they farm

Farmers and consumers see farmers in first place as ‘Providers of food’
but farmers see themselves strongly as ‘Stewards of the land’

What farmers think about consumers’ behavior

37.1% of farmers think that consumers care about sustainability in agriculture
36.3% of farmers think that consumers are willing to pay higher prices for food produced in an environmentally friendly way
34.0% of farmers think that consumers understand the importance of farmers in securing the food supply
16.4% of farmers think that consumers care about farmer’s problems

Farmers give a broad meaning to ‘sustainability in agriculture’

What sustainability means, global

Farmers:
- Protection of land use: 67.7%
- Ability to produce sufficient food to feed the world population: 62.5%
- Reduced use of chemical products: 59.4%
- Environmental friendly farming: 58.9%
- Healthy food: 56.1%
- Organic farming: 54.3%
- Bio diversity protection and enhancement: 50.9%

Consumers:
- Protection of land use: 48.3%
- Ability to produce sufficient food to feed the world population: 41.5%
- Reduced use of chemical products: 39.9%
- Environmental friendly farming: 38.2%
- Healthy food: 36.8%
- Organic farming: 35.6%
- Bio diversity protection and enhancement: 33.6%

What sustainability means by country

Farmers:
- Protection of land use: 54.6%
- Ability to produce sufficient food to feed the world population: 52.8%
- Reduced use of chemical products: 51.6%
- Environmental friendly farming: 49.0%
- Healthy food: 47.7%
- Organic farming: 45.6%
- Bio diversity protection and enhancement: 41.1%

Consumers:
- Protection of land use: 44.9%
- Ability to produce sufficient food to feed the world population: 41.2%
- Reduced use of chemical products: 39.7%
- Environmental friendly farming: 37.8%
- Healthy food: 36.1%
- Organic farming: 34.9%
- Bio diversity protection and enhancement: 31.5%

Regulatory situation in the agricultural sector puts pressure on farmers

Global overview

Farmers:
- Think the amount of agricultural regulations is too much: 49%
- Right balance: 38%
- Not enough: 17%
- Don’t know: 1%

Consumers:
- Think the amount of agricultural regulations is too much: 49%
- Right balance: 38%
- Not enough: 17%
- Don’t know: 1%

Country overview in %

Farmers:
- Think the amount of agricultural regulations is too much: 60%
- Right balance: 23%
- Not enough: 8%
- Don’t know: 9%

Consumers:
- Think the amount of agricultural regulations is too much: 27%
- Right balance: 52%
- Not enough: 14%
- Don’t know: 10%

Farmers and consumers share expectations when buying food

Farmers:
- Freshness: 59.7%
- In season: 63.3%
- Domestic production: 62.2%
- Nutritional value: 49.1%
- Visual appearance: 74.6%
- Price: 62.8%
- Environmentally friendly packaging: 59.1%
- GM-free: 61.2%
- Organic Production: 64.9%

Consumers:
- Freshness: 59.0%
- In season: 60.3%
- Domestic production: 78.2%
- Nutritional value: 66.1%
- Visual appearance: 59.0%
- Price: 65.9%
- Environmentally friendly packaging: 63.8%
- GM-free: 75.0%
- Organic Production: 59.4%

Farmers’ view on future trends in agriculture

1. Water shortages: 19%
2. Soil erosion and desertification: 16%
3. Climate change: 12%
4. Organic farming: 11%
5. Biodiversity: 10%
6. Chemical usage: 9%
7. Water: 9%
8. Imperial agriculture: 8%
9. Trade regulations: 8%
10. Labor shortages: 7%
11. Weather changes: 7%
12. Global food security: 7%
13. Labor: 6%
14. Energy consumption: 6%
15. Food security: 6%
16. Environmental protection: 6%

Questions:
1. When buying food such as vegetables, fruit, cereals/grains… how important are the following aspects to you?
2. Thinking about the regulations currently affecting agricultural production, in your country, which of the following statements best reflects your opinion?
3. What sustainability means, global
4. What do you think will be the most important trends for agriculture in your country for the next 5 years? What is likely to change?
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The BASF Farm Perspectives Study is designed to examine the gap between consumers’ opinions and perceptions on the one hand, and the realities faced by farmers on the other hand.

In 2011 BASF conducted the Farm Perspectives Study for the first time – showing strong agreement between farmers and consumers. The study was conducted in Germany, France, Spain, India, Brazil and the USA.

In 2014 BASF has commissioned a second wave of a research study to investigate and monitor current perceptions and attitudes about agriculture among farmers and consumers in Germany, France, Spain, India, Brazil, the USA and China.

This poster shows the main findings from 2014.

Methodology

Farmers
- 300 farmer interviews were conducted in each country among a representative sample of farmers.
- In order to be able to directly compare results from the two waves of research, quotas were set in 2014 that replicated, as closely as reasonably possible, the profile of the farmers interviewed during the 2011 study (region, farm size, crops grown).
- Interviews:
  - Lasted up to 20 minutes and were conducted by telephone in all countries with the exception of India and China where face-to-face interviews were conducted.
  - Were conducted with the person solely or jointly responsible for major decisions for the farm, such as investments and product purchases.
  - Were conducted anonymously.

Consumers
- 1,000 consumer interviews were conducted in each country among a representative sample of the adult population.
- In order to be able to directly compare results from the two waves of research, quotas were set in 2014 that replicated, as closely as reasonably possible, the profile of the consumers interviewed during the 2011 study.
- Interviews:
  - To provide continuity from the 2011 survey, the consumer interviews were conducted using an online panel in all countries.
  - The consumer interviews lasted a maximum of 20 minutes.
  - Were conducted anonymously.

Note:
* In Brazil, China and India access to the internet is limited to approximately 50% or less of the population. As a consequence, in these countries, there is an unavoidable bias in the sample towards the better-educated, more affluent consumers living in urban areas with the necessary infrastructure.