A SURVEY OF NORTHERN IRISH FARMERS' OPINIONS ON AGRICULTURE POLICY

April 2020

CONTENTS

NIEL commissioned research to explore farmers' opinions on current and future agriculture policy.

A survey was designed to capture opinions from a wide range of farmers on the current state of farming, problems they are facing and possible future changes to agricultural policy in Northern Ireland.

The survey was hosted on Citizenspace and open from 25th February - 23rd March 2020.

The analysis of the survey data was carried out independently by Northern Ireland Statistics and Research Agency (NISRA).

This report outlines the key findings from the research.

EXECUTIVE SUMMARY

There is a high level of recognition of the importance of a healthy environment to a sustainable farm business – two thirds of farmers (66.9%) surveyed agreed Economic prosperity is dependent on the environment. Just under half of farmers surveyed (46.6%) agreed that if climate change continues on its present course, we will experience a major environmental disaster, compared to a third of farmers who disagreed (32.5%).

Currently, the biggest concerns for farmers are;

1. Increased costs - 9 in10 farmers surveyed are concerned about increased costs and/or profit margins
2. Weather volatility - Over two thirds of farmers surveyed (69.9%) are concerned with an increase in weather volatility such as drought or flooding
3. Lack of government direction - Just under two thirds of farmers surveyed (62.6%) are concerned with a lack of policy direction from Government

Farmers are taking action to tackle these concerns - 60.7% of farmers surveyed are carrying out soil assessment/management to tackle concerns on the farm, and a further 15.3% are considering doing so. Furthermore, although less than a third (29.4%) of farmers are planting more trees/hedges or investing in agroforestry, a similar proportion (31.9%) are considering planting more trees.

The biggest barrier to tackling these concerns are a lack of access to capital (either loans or grants). Over half of farmers surveyed (57.1%) identified lack of capital as a barrier. The same percentage identified bureaucracy as a barrier – such as short term grants, contracts and penalties while 40.5% identified Market volatility as a barrier.

Of those farmers surveyed, Water Management, Soil Conservation and Habitat restoration were considered the top 3 priorities for agricultural environmental policy.

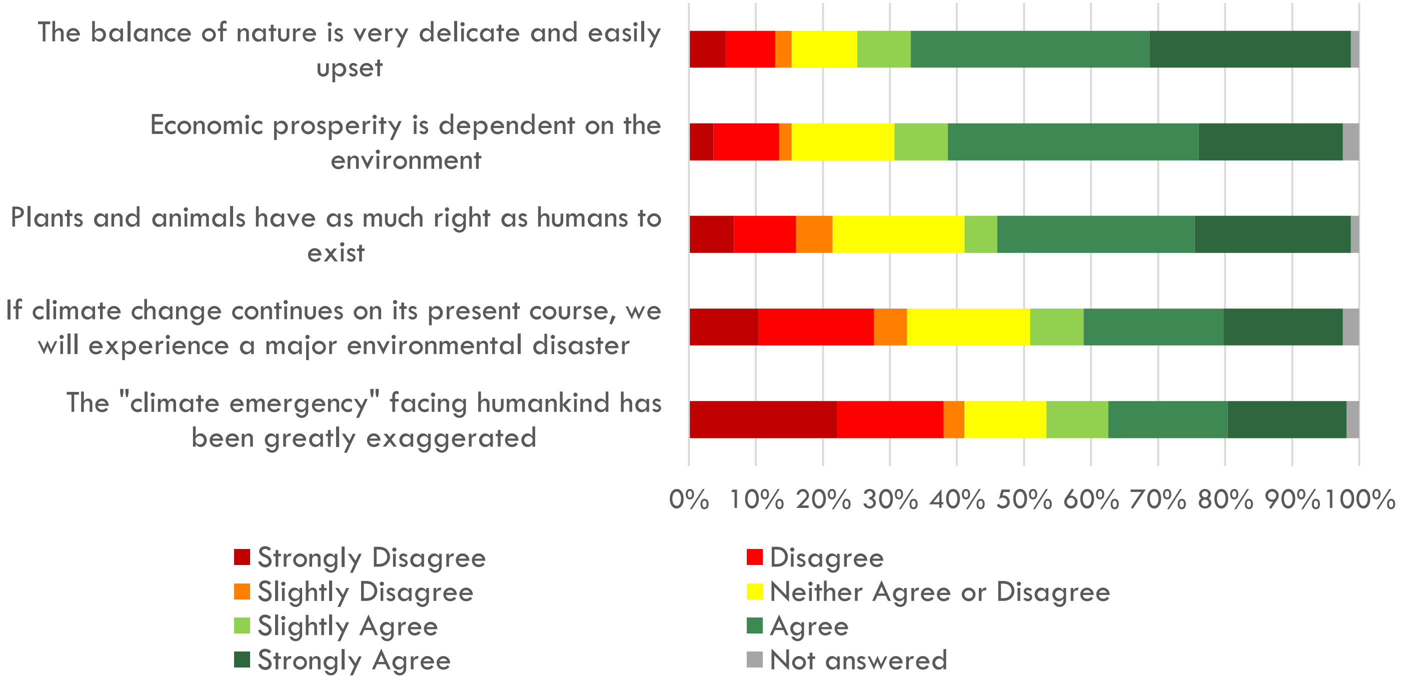
There was broad support for making regulations more effective - 71.4% of farmers surveyed think ensuring a local advisor is readily available to enable prevention and correction before enforcement would make the current regulations more effective.

ATTITUDE TO THE ENVIRONMENT

1

FARMING AND THE ENVIRONMENT

How important, if at all, do you think the health of the natural environment is for your farm business?
Respondents % | n=163



Farming and the Environment

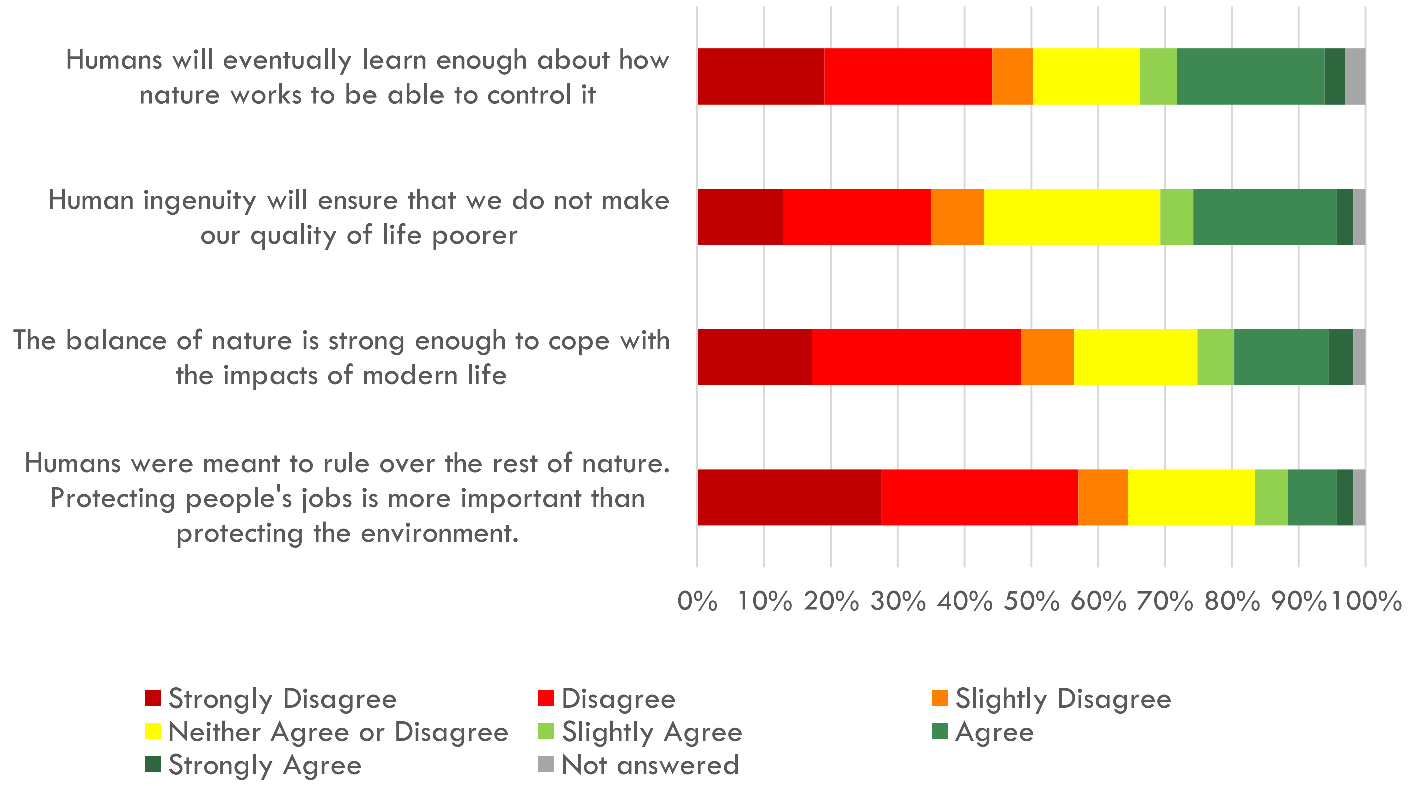
There is a high level of recognition of the importance of a healthy environment to a sustainable farm business – two thirds of farmers (66.9%) surveyed agreed Economic prosperity is dependent on the environment. Furthermore, nearly three quarters (73.6%) of farmers agreed that the balance of nature is very delicate and easily upset while over half (57.7%) agreed plants and animals have as much right as humans to exist.

Climate Change

Just under a half of farmers surveyed (46.6%) agreed that if climate change continues on its present course, we will experience a major environmental disaster, compared a third of farmers who disagreed (32.5%).
44.8% of farmers agreed the "climate emergency" facing humankind has been greatly exaggerated, compared to 41.1% who disagreed.

FARMING AND THE ENVIRONMENT

How important, if at all, do you think the health of the natural environment is for your farm business?
Respondents % | n=163



Balance of Nature

Over half of farmers surveyed (56.4%) disagreed that the balance of nature is strong enough to cope with the impacts of modern life.

Meanwhile half of farmers surveyed (50.3%) disagreed humans will eventually learn enough about how nature works to be able to control it, compared to 30.7% who agreed.

Mankind and the Environment

Around two thirds of farmers surveyed (64.4%) disagreed that humans were meant to rule over the rest of nature and protecting people's jobs is more important than protecting the environment.

42.9% disagreed that human ingenuity will ensure that we do not make our quality of life poorer, compared to 28.8% who agreed.

FARMING AND THE ENVIRONMENT

How important, if at all, do you think the health of the natural environment is for your farm business?
Respondents % | n=163

Majority disagree | Majority agree

Farming and the Environment	Percentage of Respondents: Strongly Disagree – Slightly Disagree	Neither	Slightly Agree - Strongly Agree	Not answered
The balance of nature is very delicate and easily upset	15.3	9.8	73.6	1.2
Economic prosperity is dependent on the environment	15.3	15.3	66.9	2.5
Plants and animals have as much right as humans to exist	21.5	19.6	57.7	1.2
If climate change continues on its present course, we will experience a major environmental disaster	32.5	18.4	46.6	2.5
The "climate emergency" facing humankind has been greatly exaggerated	41.1	12.3	44.8	1.8
Humans will eventually learn enough about how nature works to be able to control it	50.3	16.0	30.7	3.1
Human ingenuity will ensure that we do not make our quality of life poorer	42.9	26.4	28.8	1.8
The balance of nature is strong enough to cope with the impacts of modern life	56.4	18.4	23.3	1.8
Humans were meant to rule over the rest of nature. Protecting people's jobs is more important than protecting the environment	64.4	19.0	14.7	1.8

COMMON PROBLEMS 2

FARM CONCERNS

1. Increased costs

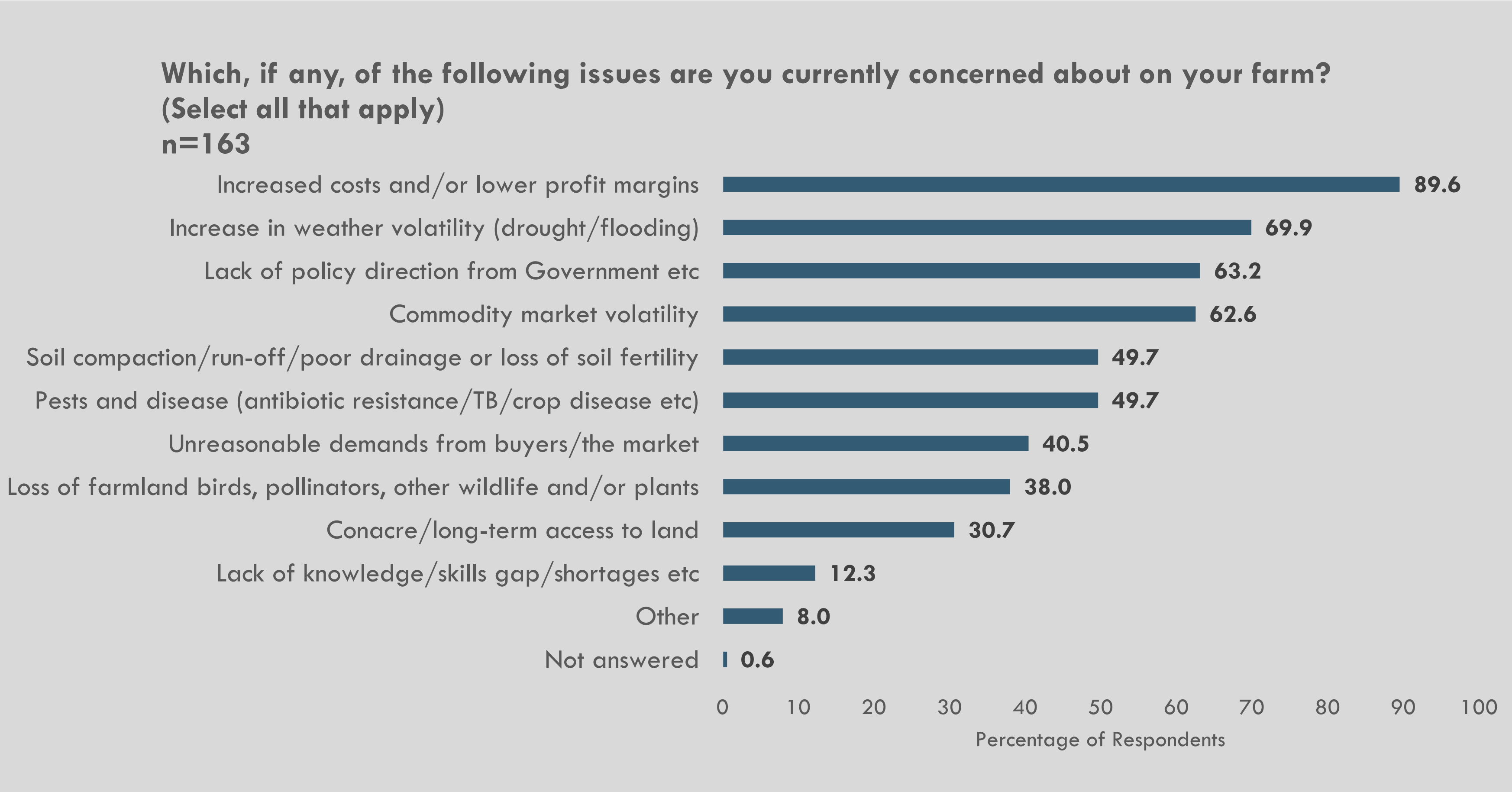
9 in 10 farmers surveyed are concerned about increased costs and/or profit margins.

2. Weather Volatility

Over two thirds of farmers surveyed (69.9%) are concerned with an increase in weather volatility such as drought or flooding.

3. Government Direction

Just under two thirds of farmers surveyed (62.6%) are concerned with a lack of policy direction from Government.



CURRENT ACTION

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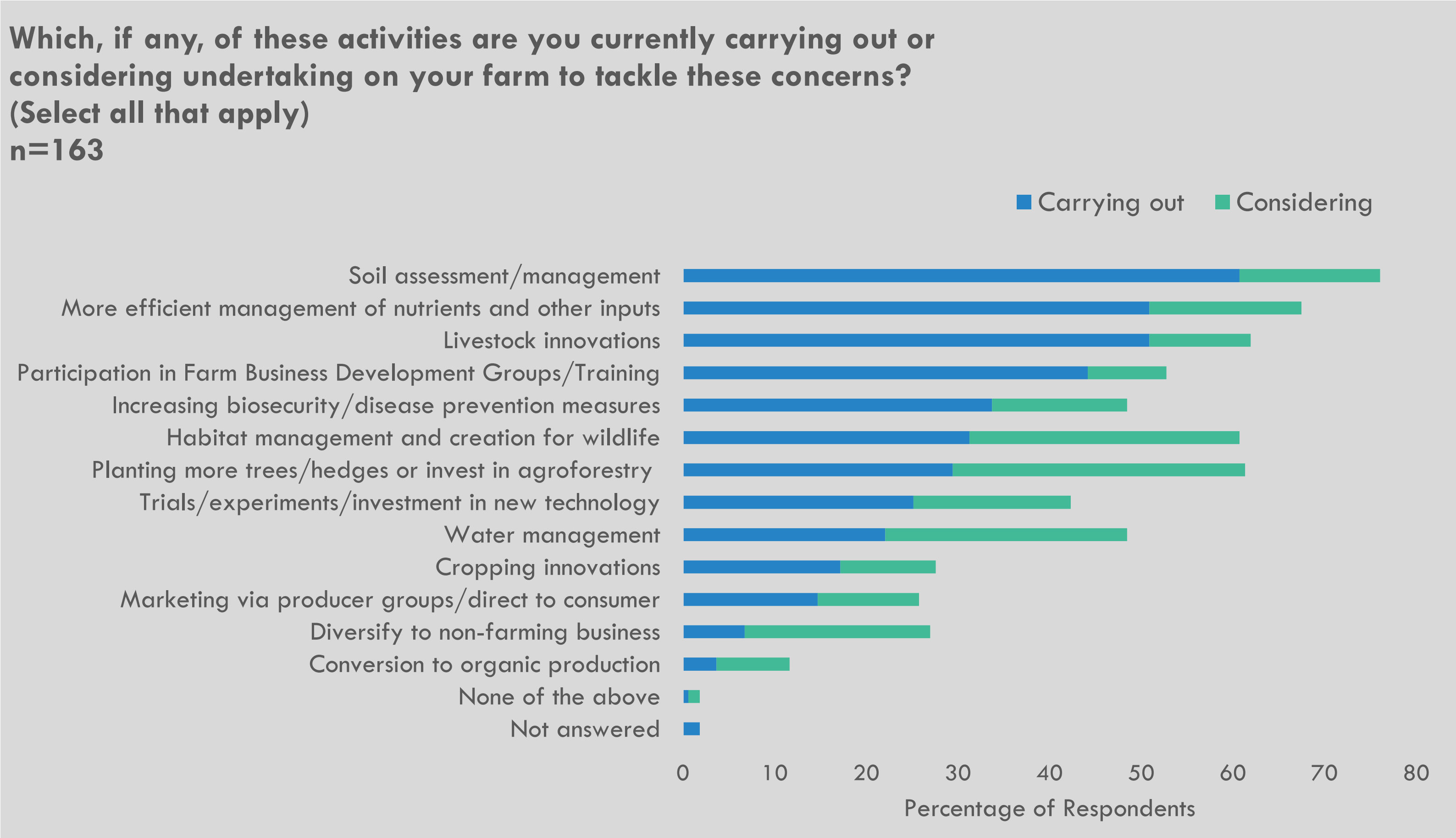
FARM ACTIVITIES TO TACKLE CONCERNS



Soil Assessment/Management

60.7% of farmers surveys are carrying out soil assessment/management to tackle concerns on the farm, and a further 15.3% are considering – combined that equates to three quarters of farmers surveyed – the highest level of all activities.

Agro-forestry

Less than a third (29.4%) of farmers are planting more trees/hedges or investing in agroforestry while a similar proportion (31.9%) are considering undertaking.

Water Management

Of farmers surveyed, over one in four are considering undertaking water management (26.4%) and around one fifth are currently carrying it out (22.1%).

FARMING AND THE ENVIRONMENT

First

Second

Third

Which, if any, of these activities are you currently carrying out or considering undertaking on your farm to tackle these concerns? (Select all that apply)
n=163

	Percentage of Respondents		
	Carrying out	**Considering**	**Total**
Soil assessment/management	60.7	15.3	76.1
More efficient management of nutrients and other inputs	50.9	16.6	67.5
Livestock innovations (improved genetics, feed regimes etc..)	50.9	11	62
Planting more trees/hedges or invest in agroforestry	29.4	31.9	61.3
Habitat management and creation for wildlife (wildflower margins/species rich grassland etc..)	31.3	29.4	60.7
Participation in Farm Business Development Groups/Training	44.2	8.6	52.8
Increasing biosecurity/disease prevention measures	33.7	14.7	48.5
Water management (drainage/pond/reservoir investment)	22.1	26.4	48.5
Trials/experiments/investment in new technology	25.2	17.2	42.3
Cropping innovations (Cover crops/grass leys/rotations/spring cropping etc.)	17.2	10.4	27.6
Diversify to non-farming business (holiday lets/building conversion/farm walks/education).	6.7	20.2	27
Marketing via producer groups/direct to consumer	14.7	11	25.8
Conversion to organic production	3.7	8	11.7
None of the above	0.6	1.2	1.8
Not answered			1.8

BARRIERS TO CHANGE

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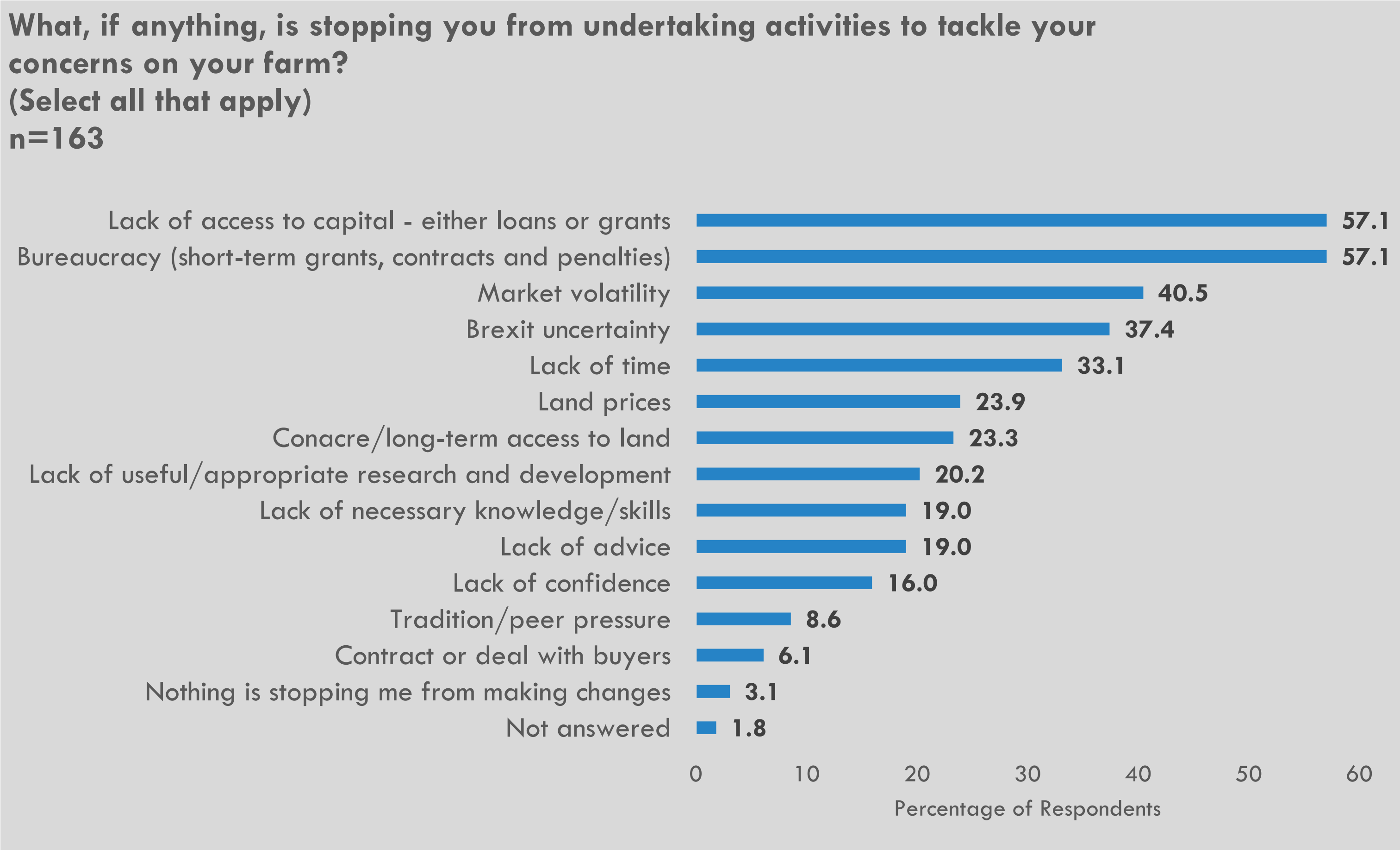
BARRIERS



Lack of access to capital / Bureaucracy

Over half of farmers surveyed (57.1%) identified a lack of access to capital – either loans or grants – as a barrier to tackling the concerns on their farm. The same percentage identified bureaucracy – such as short term grants, contracts and penalties as a barrier. (Joint highest percentage)

Market volatility

Market volatility was a barrier for 40.5% of farmers surveyed (the third highest percentage).

Brexit uncertainty

Just over a third (37.4%) identified the uncertainty surrounding Brexit as a barrier to undertaking activities - the fourth highest barrier.

EXISTING FARMING POLICY | 5

AGRI-ENVIRONMENT SCHEMES & CLIMATE CHANGE

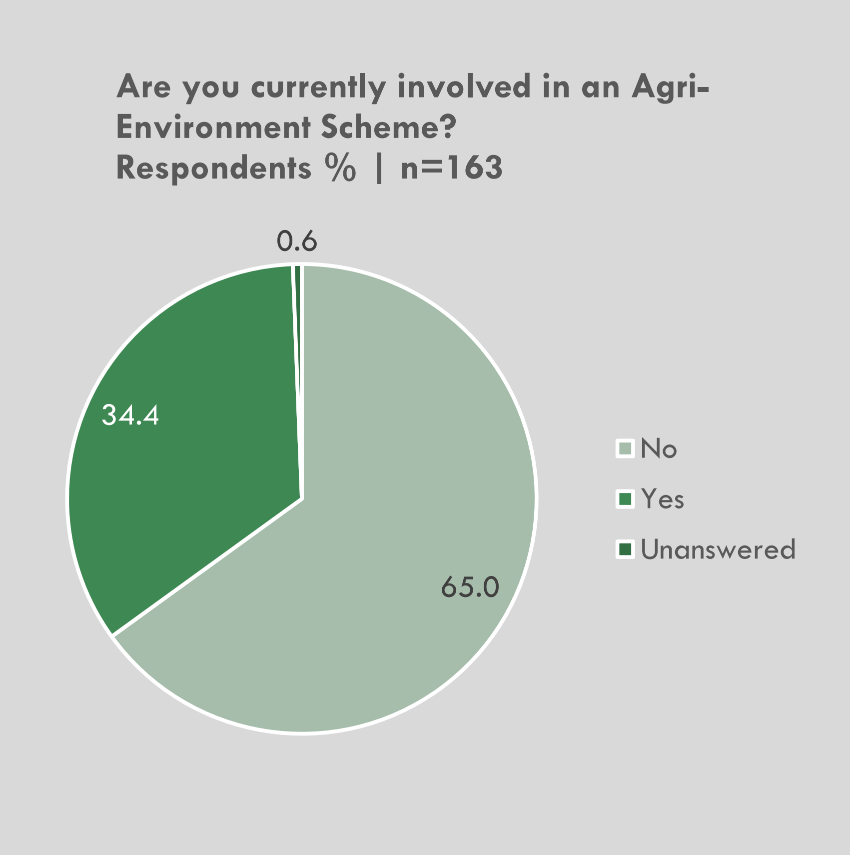
Around two thirds (65%) of farmers surveyed are currently involved in an Agri-Environment Scheme.

45.4% of farmers are either dissatisfied or very dissatisfied with existing Agri-Environment schemes meeting their needs, compared to 12.9% who are either satisfied or very satisfied.

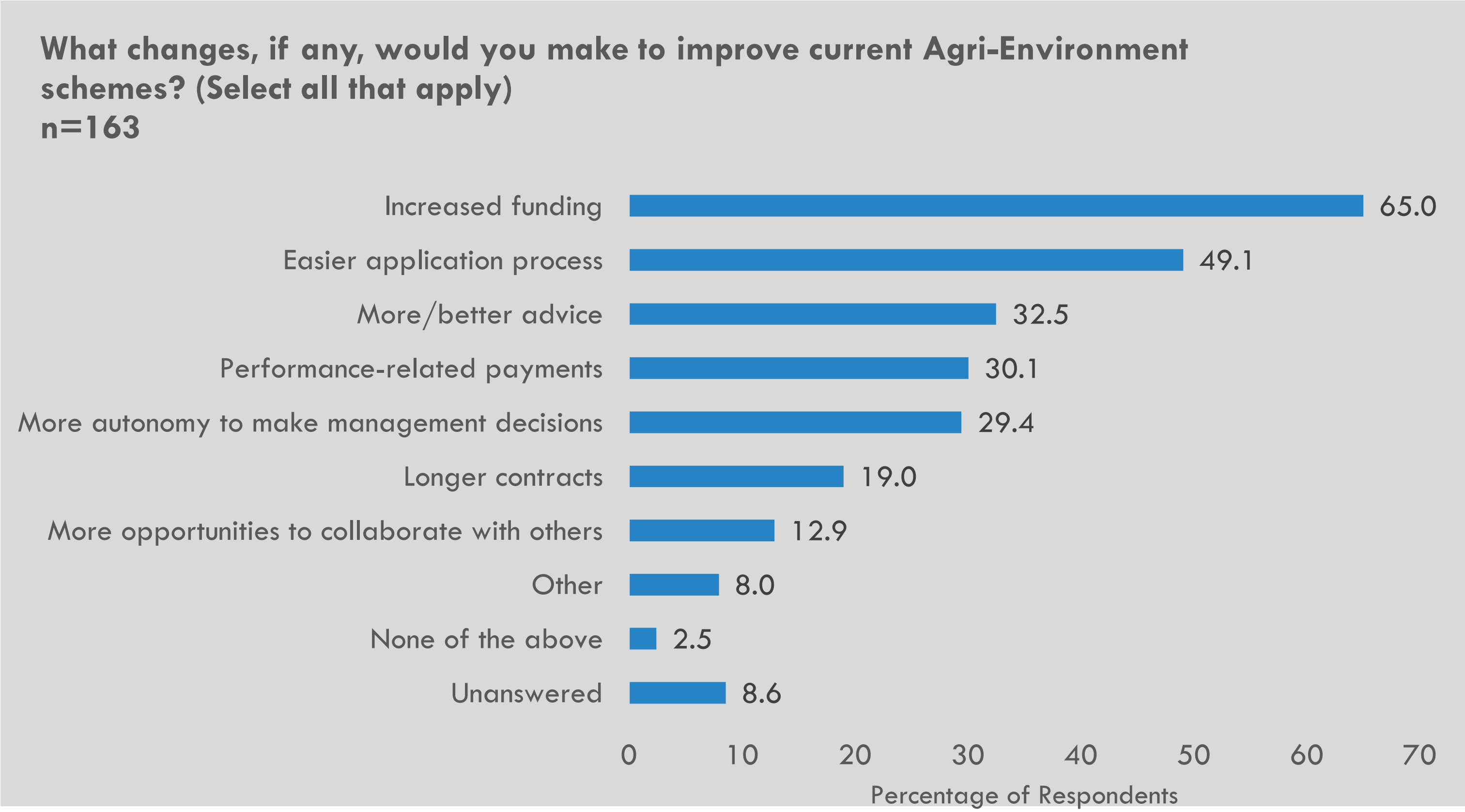
Satisfaction is higher for Farmers who are currently involved in Agri Environmental Schemes, 33.9% are either satisfied or very satisfied that the scheme is meeting their needs.

How satisfied are you that existing Agri-Environment schemes meet your needs? n=163

Satisfaction	Percentage of Respondents
Very dissatisfied	19.0
Dissatisfied	26.4
Neutral	28.2
Satisfied	10.4
Very Satisfied	2.5
Unanswered	13.5



WHAT CHANGES, IF ANY, WOULD YOU MAKE TO IMPROVE CURRENT AGRI-ENVIRONMENT SCHEMES?



Increased funding

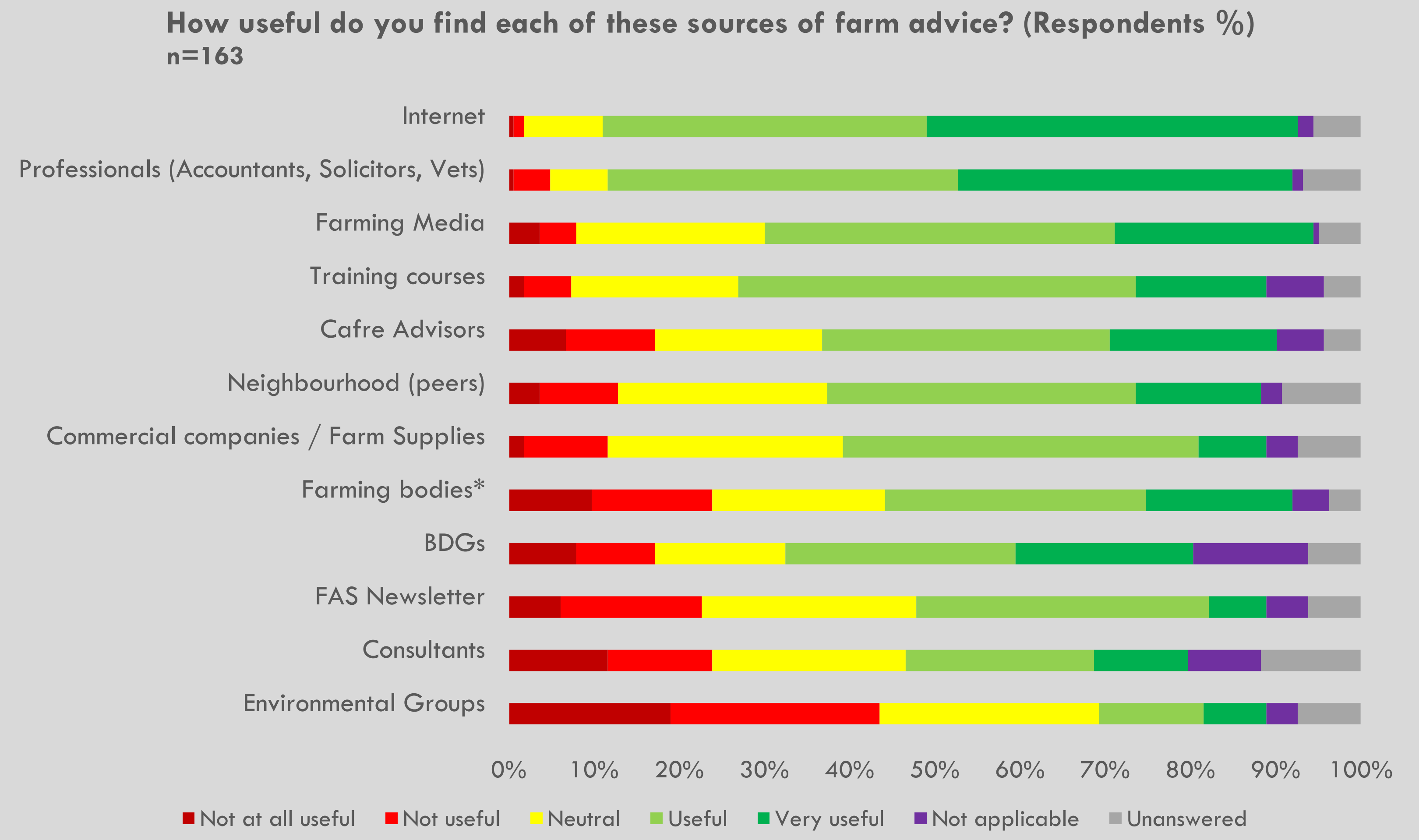
65% of respondents stated they would increase funding to improve current Agri- Environment scheme (the highest percentage). Over half of farmers surveyed (57.1%) identified a lack of access to capital – either loans or grants – as a barrier to tackling the concerns on their farm. The same percentage identified bureaucracy – such as short term grants, contracts and penalties as a barrier.

Other

8% of farmers surveyed identified other changes to improve current Agri-Environment Schemes. Suggestions included;

- Reducing minimum spend required to be eligible for grant support helping smaller farm businesses access funding
- Increasing timelines as environmental benefits take longer to realise
- Planting hedge rows and trees on land which isn't suitable for day to farming - financed by private companies to offset their carbon footprint

KNOWLEDGE EXCHANGE



*Farm Bodies (e.g. UFU, NIAPA, Farmers for Action, Nature Friendly Farmers Network)

Top 3 sources of farm advice

The internet is the most useful source of farm advice – 8 in 10 farmers rate it as either useful or very useful, followed by Professional sources such as Accountants, Solicitors and Vets (80.4%) and Farming Media (64.4%).

Least useful sources of farm advice

Environmental Groups are considered the least useful sources of farm advice – 19% of farmers surveyed rated them as not at all useful and a further 24.5% rated as not useful – a total of 43.6%.

FARMING AND THE ENVIRONMENT

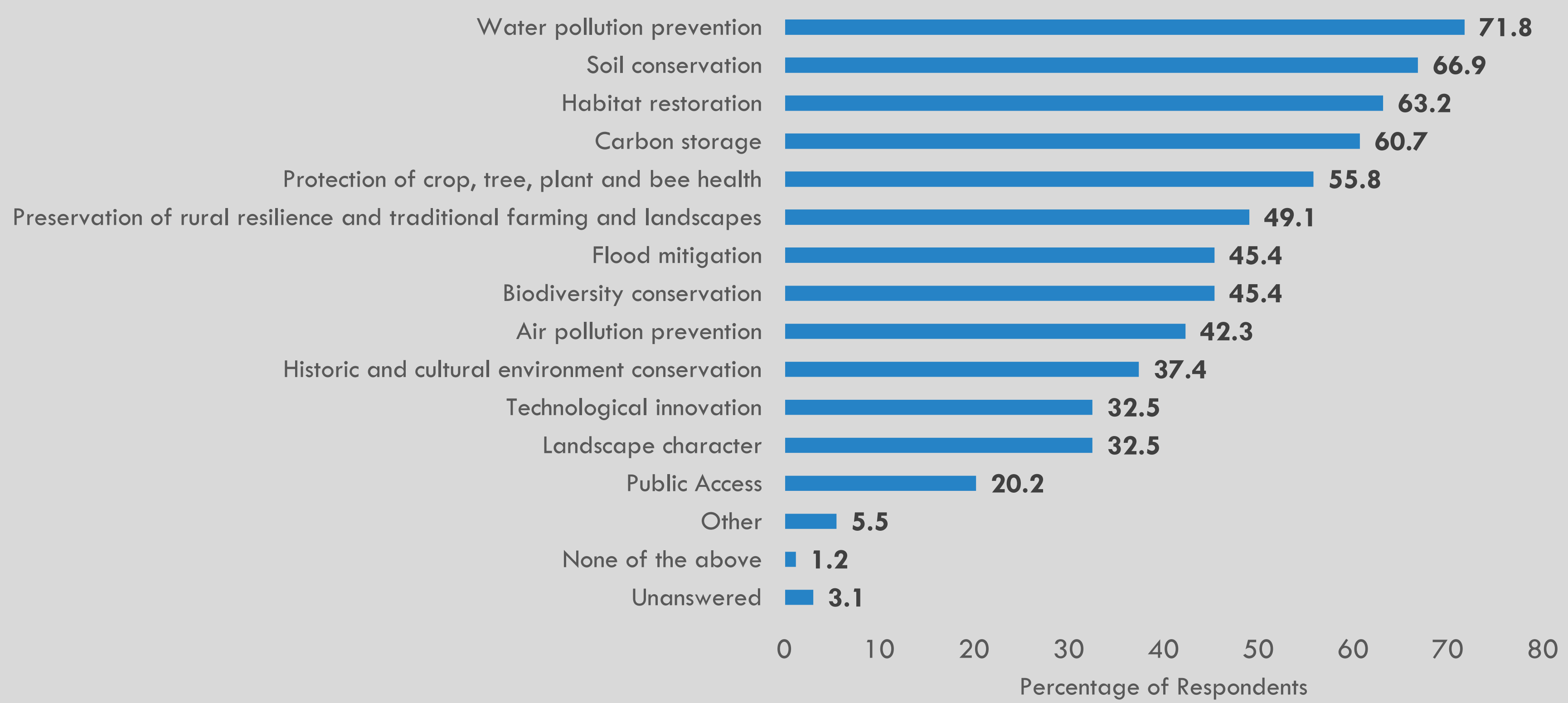
How useful do you find each of these sources of farm advice? (Respondents %)
n=163

Knowledge Exchange Source	Percentage of Respondents			
	Not at all Useful/ Not Useful	Neutral	Useful / Very Useful	Unanswered
Internet	1.8	9.2	81.6	5.5
Professionals (Accountants, Solicitors, Vets)	4.9	6.7	80.4	6.7
Farming Media	8.0	22.1	64.4	4.9
Training courses	7.4	19.6	62.0	4.3
Cafre Advisors	17.2	19.6	53.4	4.3
Neighbourhood (peers)	12.9	24.5	50.9	9.2
Commercial companies / Farm Supplies	11.7	27.6	49.7	7.4
BDGs	17.2	15.3	47.9	6.1
Farming Bodies (e.g. UFU, NIAPA, Farmers for Action, Nature Friendly Farmers Network)	23.9	20.2	47.9	3.7
FAS Newsletter	22.7	25.2	41.1	6.1
Consultants	23.9	22.7	33.1	11.7
Environmental Groups	43.6	25.8	19.6	7.4

FUTURE FARMING POLICY | 6

FUTURE FARMING POLICY

Which of the following, if any, environmental benefits do you think farmers should be paid to deliver as part of their core Farm Business class? (Select all that apply)
n=163



Of those farmers surveyed, Water Management, Soil Conservation and Habitat restoration were considered the top 3 priorities.

Water Pollution Prevention

7 in 10 farmers surveyed (71.8%) think they should be paid to deliver water pollution prevention as part of their core Farm business class. As previously identified in the report over one quarter of farmers are considering undertaking water management (26.4%) and over one in 5 are currently carrying it out (22.1%).

Soil Conservation

Around two thirds (66.9%) of farmers surveyed think soil conservation should be included as part of their core Business class.
As previously identified in the report 60.7% of farmers surveys are carrying out soil assessment/management to tackle concerns on the farm – the most popular activity, and a further 15.3% are considering.

Habitat restoration

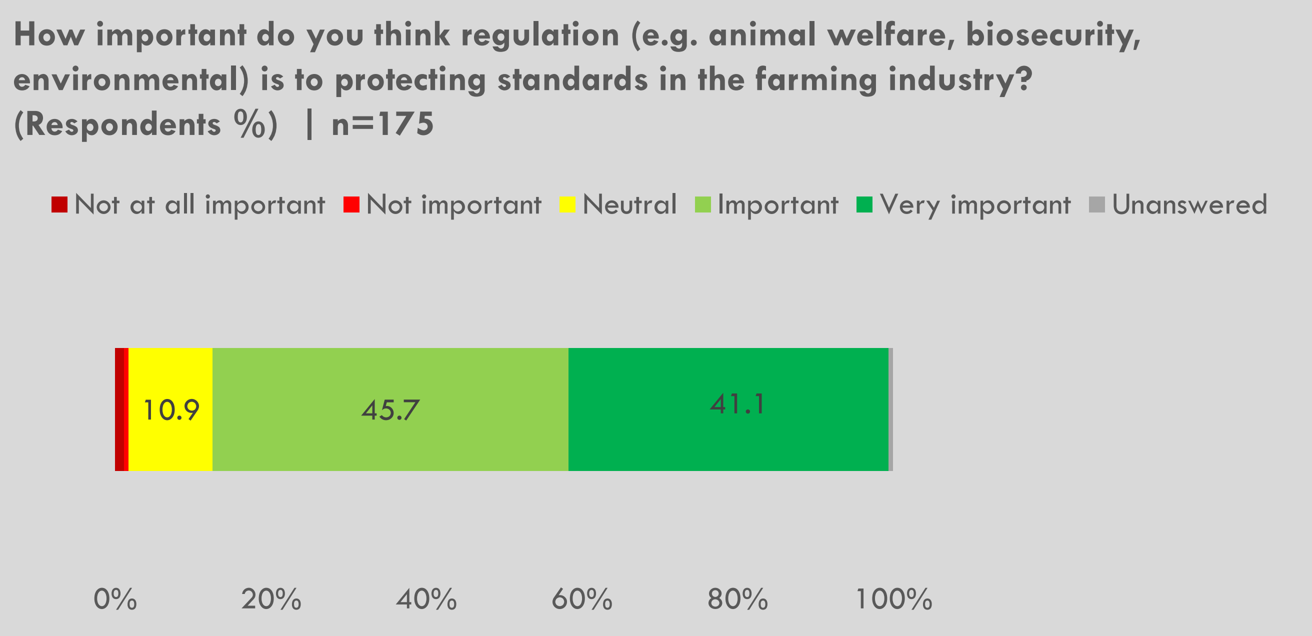
Under two thirds (63.2%) of farmers surveyed think habitat restoration should be included as part of their core Business class.

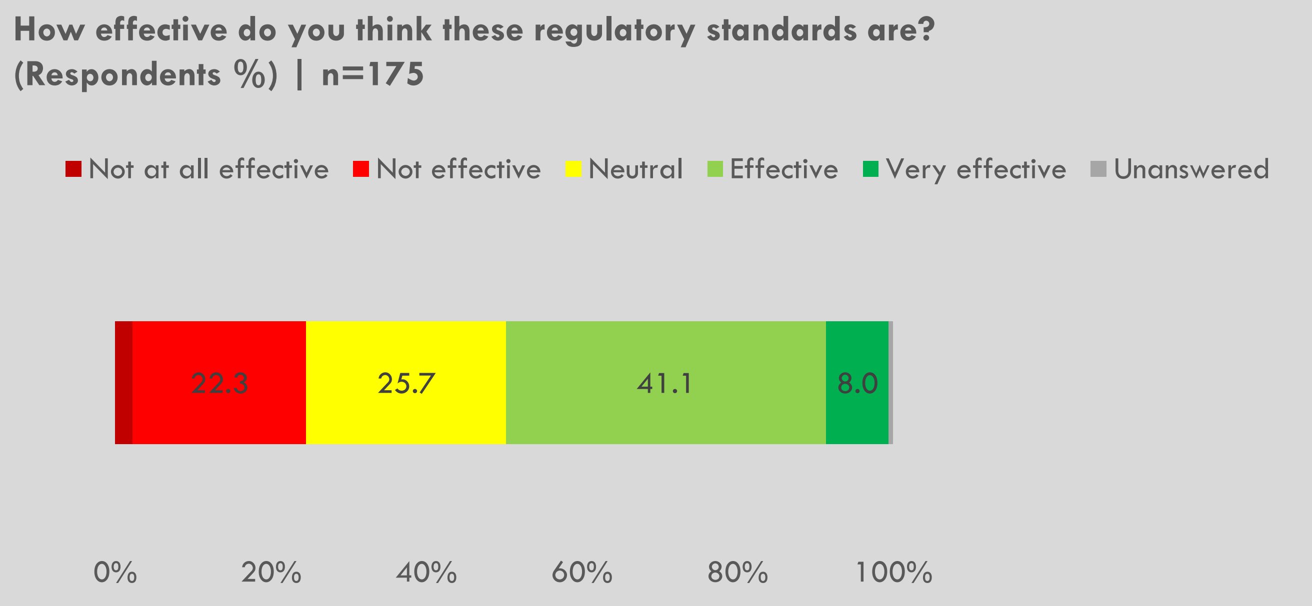
REGULATIONS

Regulations

The majority of farmers surveyed (86.8%) think regulations such as animal welfare, biosecurity and environmental, are important to protecting the farming industry.

Around a half of farmers surveyed (49.1%) think the current regulatory standards are either effective or very effective. A further quarter (25.7%) are neutral on the effectiveness while the remaining quarter (24.6%) rate them as either not effective or not at all effective.





CHANGES FOR MORE EFFECTIVE FARMING REGULATION AND ENFORCEMENT

Effective changes

There is broad support for suggested changes to make farming regulation and enforcement more effective – over 71.4% of farmers surveyed think ensuring local advisor is readily available to enable prevention and correction before enforcement would make the current regulations more effective- the highest of all changes outlined.

Other

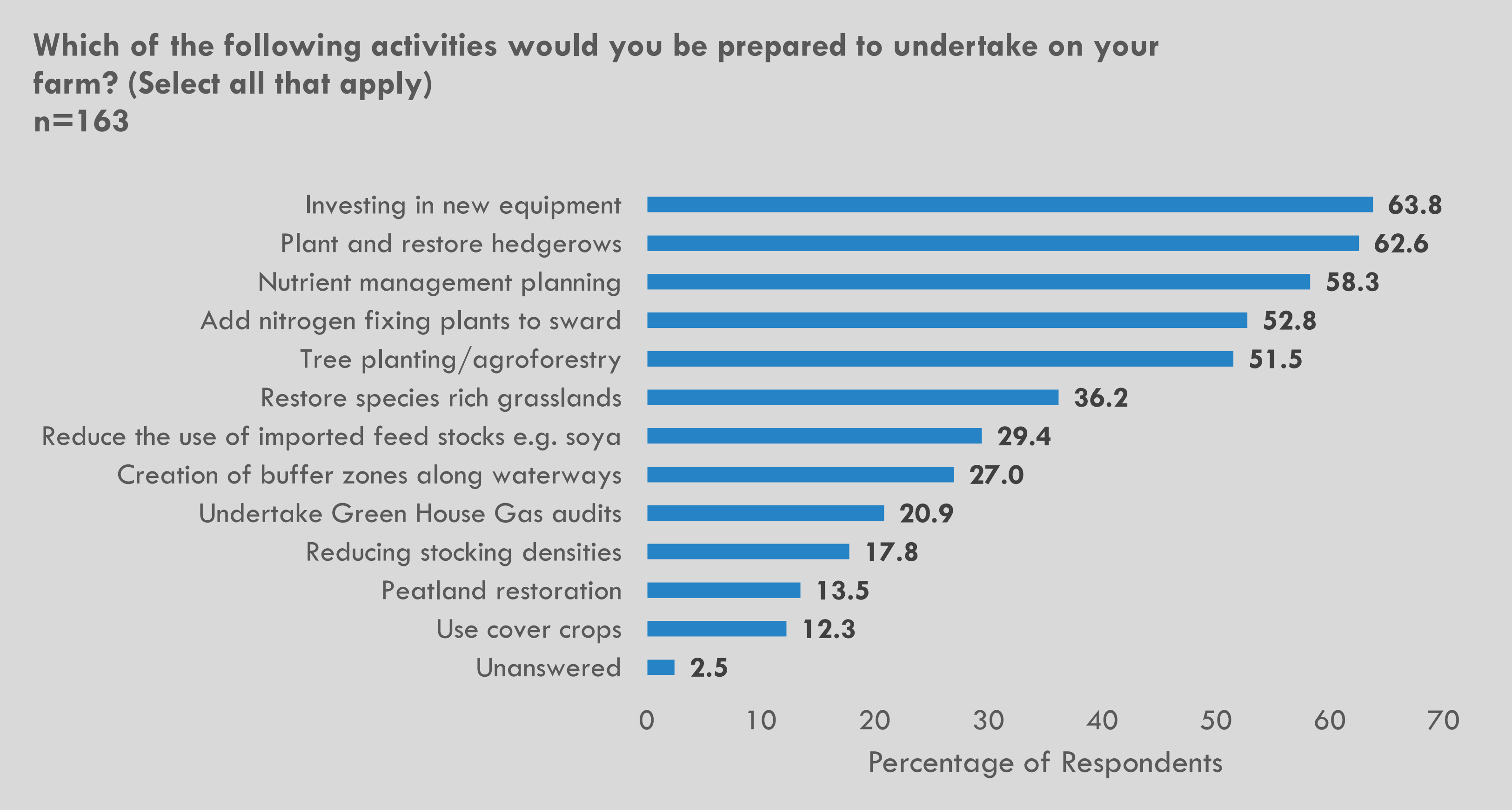
6.3% of respondents suggested other changes, including;

- Increasing penalties for failure to comply or wilful disregard of regulatory requirements
- 24 hour helpline for advice on all financial benefits available and laws, restrictions, general advice
- More help to adhere to areas below par at inspection instead of financial penalties at first offence
- More levels of warning on breaches to an inspection so it can be fixed before suspension or penalties take place

What changes, if any, do you think are needed to make farming regulation and enforcement more effective? (Select all that apply) | n=175

Changes to Farming Regulations	Respondents (%)
Ensure local advisor support is readily available to enable prevention and correction before enforcement	71.4
Reduce the number of agencies involved	57.1
Provide local workshops to share knowledge and improve technical expertise	49.1
Provide more advice/support to improve understanding as to what I am delivering through my scheme agreement	49.1
Streamline assessments to have one (whole farm) visit cover multiple requirements	48.0
Streamline scheme application process	46.3
Other	6.3
No changes required	2.3
Unanswered	1.7

CONCERTED ACTION ON CLIMATE CHANGE



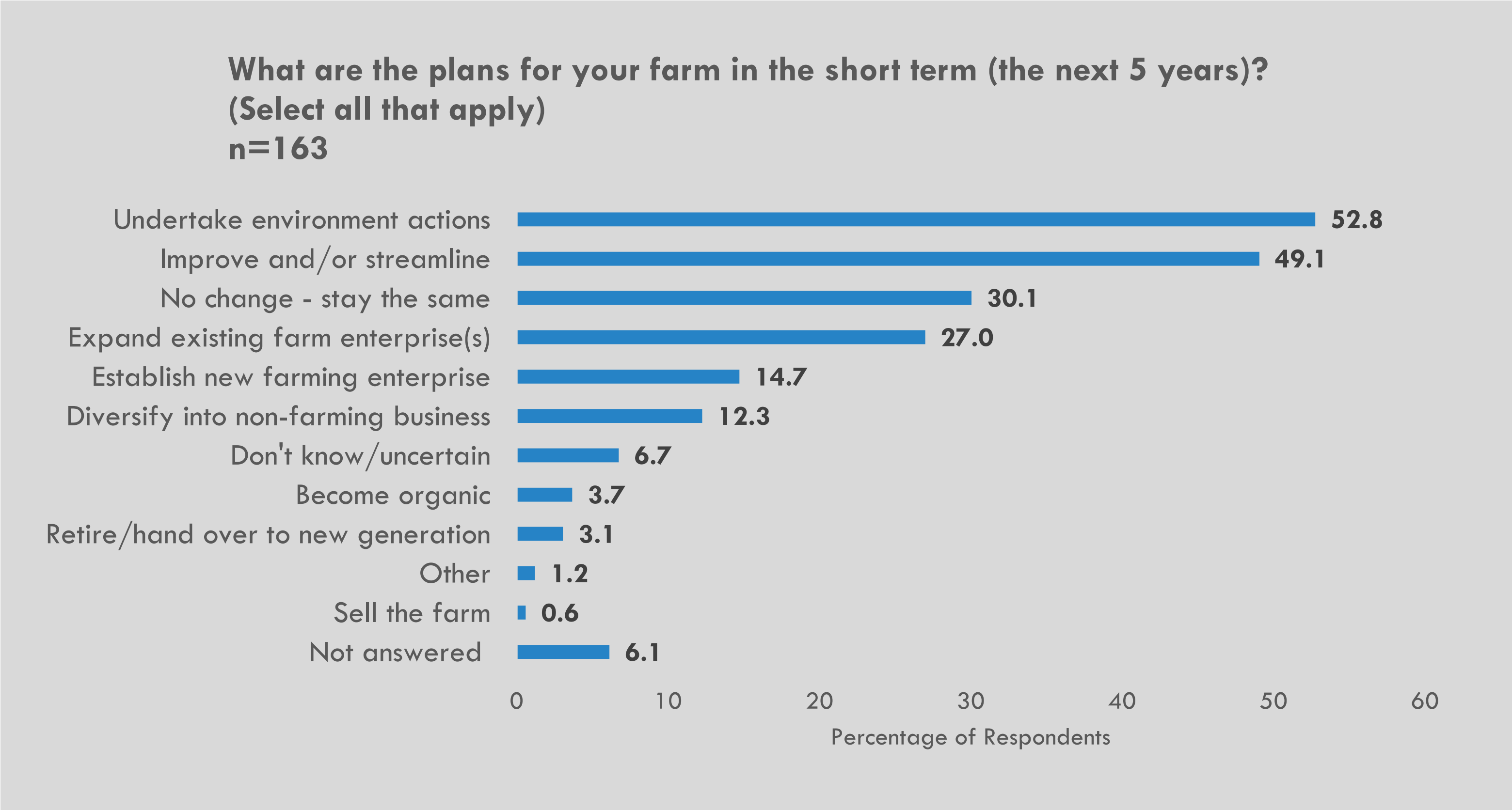
The recent "New Decade, New Approach" document makes a number of commitments to take concerted action on Climate change. As part of this, farming and land use will be expected to play a part.

Farmers were asked if provided with adequate support, which activities would they be prepared to undertake on their farm? Of those surveyed, Around two thirds (63.8%) are prepared to invest in new equipment (such as slurry and manure storage/minimum tillage/trailing shoe) – the highest of all activities.

62.6% of farmers surveyed are prepared to plant and restore hedge rows and over half (51.5%) are prepared to plant trees and invest in agroforestry.

FARM BUSINESS PLANS | 7

SHORT TERM PLANS FOR FARM BUSINESS



Over half of farmers surveyed (52.8%) plan to undertake environment actions on their farm in the next 5 years – the highest of all categories.

Just under half of those responding (49.1%) plan to improve and/or streamline their farm in the next 5 years.

Just under a third (30.1%) plan no changes in the short-term and will stay the same.

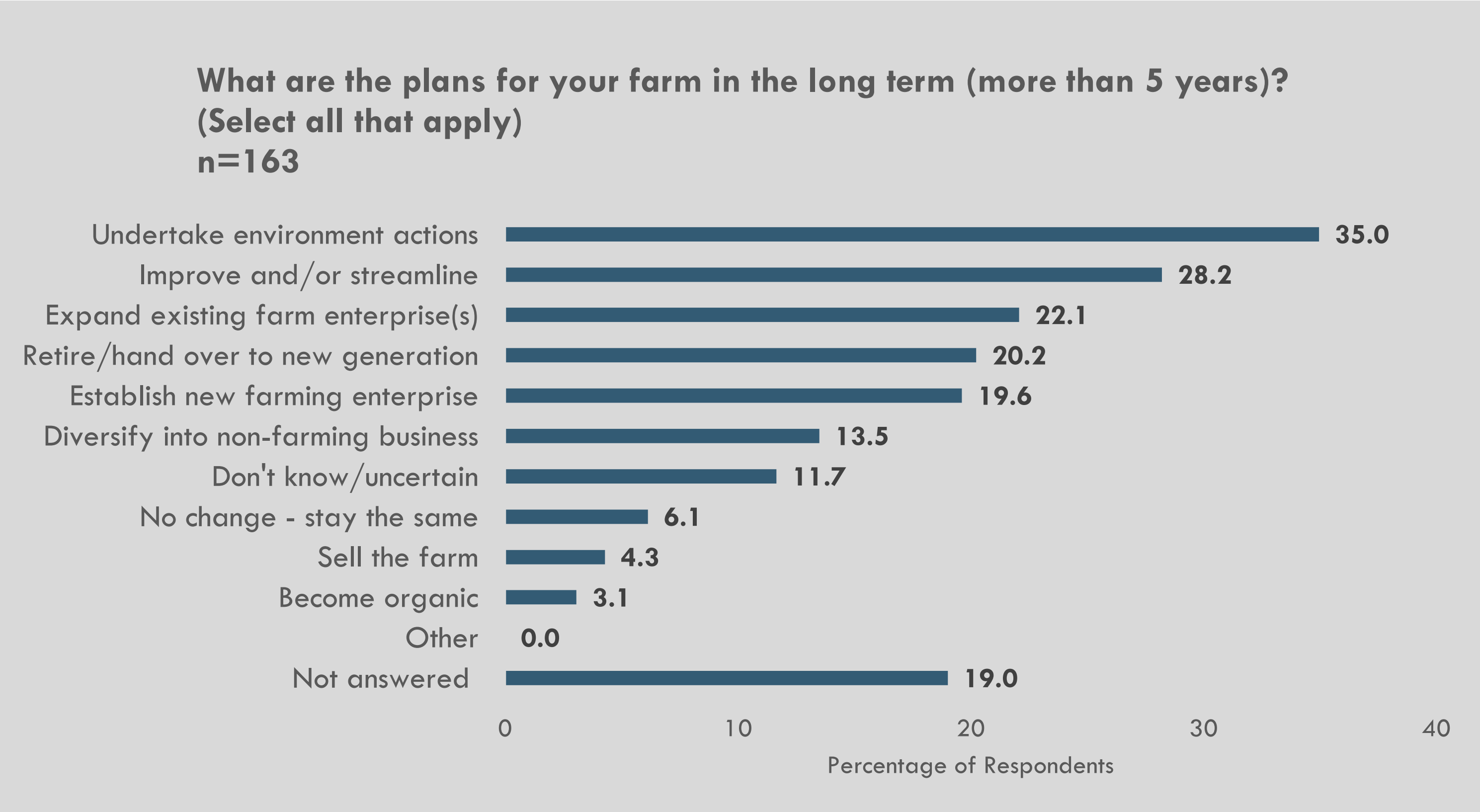
27% of respondents indicated they wanted to expand their existing farm enterprise in the short term – of those 48% intend to expand their livestock business.

14.7% of respondents indicated they wanted to establish a new farm enterprise in the short term – of those 54% intend to establish a livestock business.

48.6% of the farmers surveyed were beef and/or sheep farmers – the largest farming type group. For context, 79% of farmers in NI Ireland are beef and/or sheep farmers.[1]

[1] NI Context Source: Figure 2.3 Number of farms by farm type, Farm Census, 2019

LONG TERM PLANS FOR FARM BUSINESS



Around a third of farmers surveyed (35.0%) plan to undertake environment actions on their farm in the long-term (more than 5 years) – the highest of all categories.

22.1% indicated they wanted to expand their existing farm enterprise in the long term – of those 42% intend to expand their livestock business.

22.1% indicated they wanted to expand their existing farm enterprise in the long term – of those 42% intend to expand their livestock business.

19.6% indicated they wanted to establish a new farm enterprise in the long term – of those 25% intended to establish a livestock business.

A small percentage (6.1%) plan no changes in the long-term and intend to stay the same.

PROTECTED SITES

8

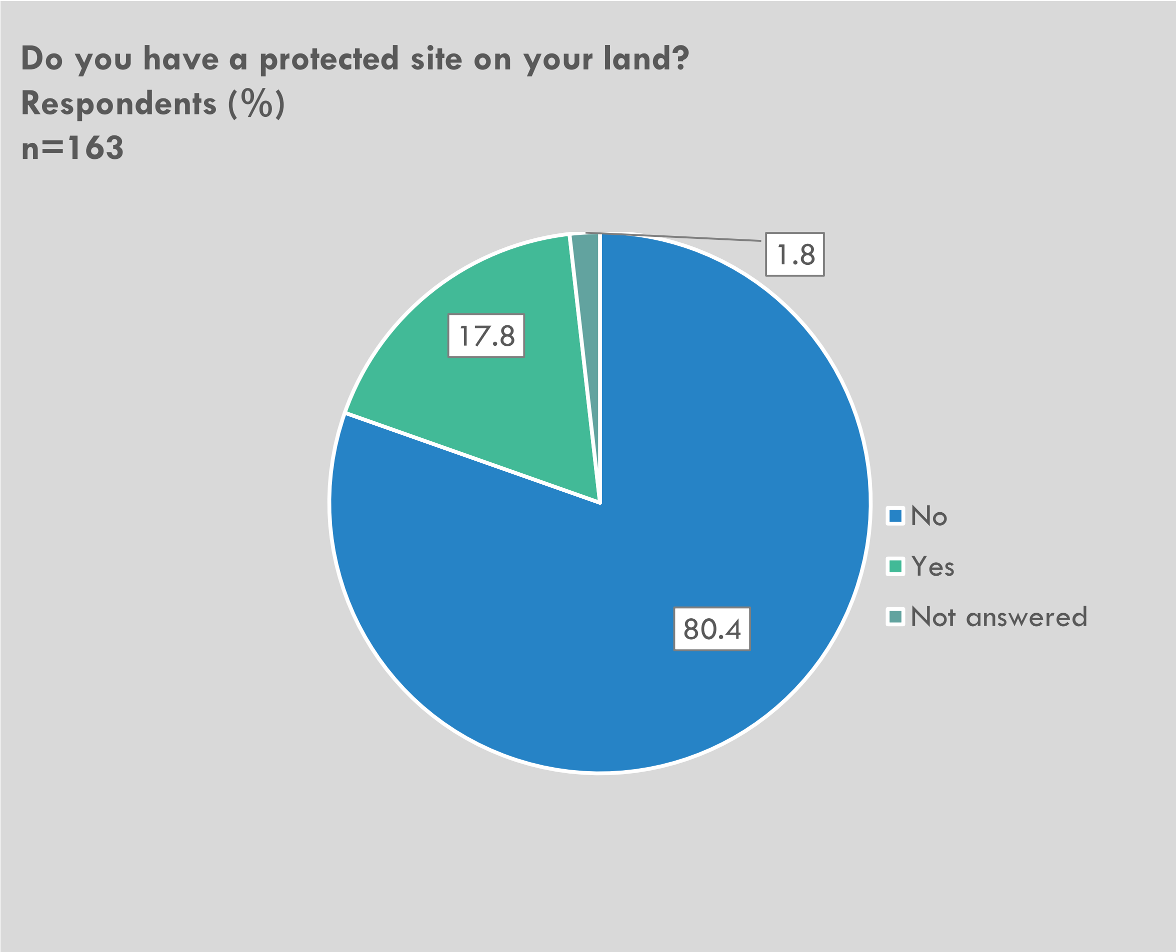
PROTECTED SITES

Less than a fifth (17.8%) of farmers surveyed have a protected site on their land.

The majority of those farmers (60%) view it as a positive for their farm.

To manage their protected site, 70% of farmers surveyed would find fact sheets on species identification and habitat management useful. Two thirds (66.6%) would find illustrated guides on wildlife and habitat management useful.

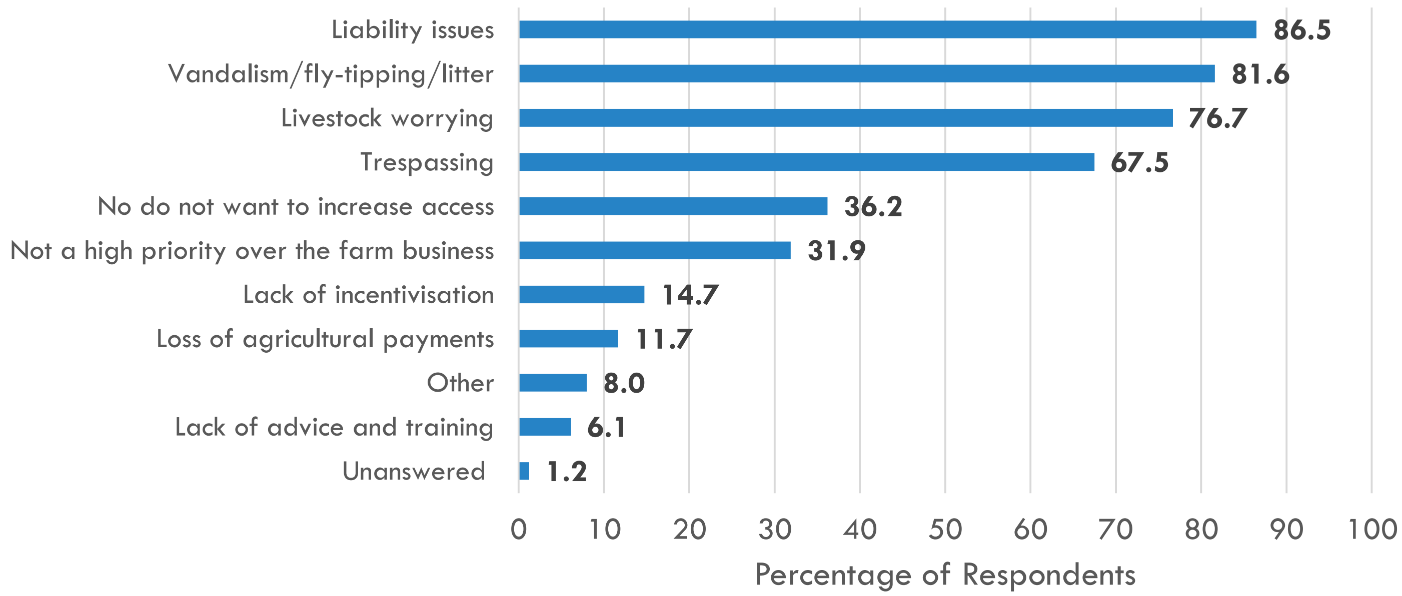
<u>Please note this is based on a small sample size of those 29 survey respondents who have a protected site and results therefore have limitations.</u>



PUBLIC ACCESS TO FARM LAND | 9

KEY CONCERNS

What are the key concerns for not opening up or increasing access on your farm to the public?
(Select all that apply)
n=163



Public Access to Farm/Land

At the moment, there is a lack of public access to the countryside of Northern Ireland, especially when compared to Great Britain where there are a myriad of footpaths across farmland.

Of farmers surveyed, a small proportion (14.1%) would consider or want to open up or increase access of their farm to the public.

The majority (84%) would not consider opening up access of their farm to the public. The key concern is liability issues (86.5%), followed by vandalism or fly-tipping (81.6%) and concern for worrying livestock in the fields (76.7%).

METHODOLOGY

LIMITATIONS

Coverage

In total 175 survey responses were captured and 163 had a direct role on the farm (either as Landowner, Farm manager, Farm Family Member or Farm labourer). The sample breakdown provides context indicators to outline the representativeness of the sample to the farming population of Northern Ireland.

Low sample sizes

Due to the overall size of the sample, it is not possible to provide a breakdown for demographic variables due to disclosure concerns.

Large proportion of Young Farmers

Over 20% of the sample are aged 35 or under, compared to 8% of all Northern Ireland farmers who are aged under 40. This is most likely due to data capture methods of an online survey.

Respondents who did not have a direct farm role

6.9% of survey respondents did not have a direct role on the farm. Responses from this cohort were included in the overall total where appropriate – these questions have a base size of 175. Questions relating directly to a respondents own farm use a base size excluding this cohort (n=163)

SAMPLE BREAKDOWN

In total 175 people completed the survey;

1. 163 had a direct role on the farm (either as Landowner, Farm manager, Farm Family Member or Farm labourer)

2. 12 respondents indicated they have a Farm Role classified as 'OTHER' – these respondents were routed to the final survey section and answered questions relating to Regulations

3. Responses to questions were not mandatory and some respondents did not provide answers – the analysis will include 'Not answered' as a value category and will only include those respondents who were asked the question and did not provide an answer.

4. Where possible, context indicators for Northern Ireland have been included to illustrate the representativeness of the sample (unless otherwise stated, source is 2019 Farm Census) https://www.daera-ni.gov.uk/sites/default/files/publications/daera/Agricultural%20Census%202019%20Rev%201.pdf

Farm Role	Sample Total	Sample Percent
Landowner/Farm manager	84	48.0
Farm Family Member (working on family farm)	54	30.9
Landowner only	19	10.9
Other	12	6.9
Farm Manager only	4	2.3
Farm labourer workforce (non-family member)	2	1.1
Total	175	100.0

Survey Sample

Age Group	Sample Total	Sample Percent
Under 35 years	35	20.0
35 - 44 years	39	22.3
45 - 54 years	53	30.3
55 - 64 years	26	14.9
65 years and over	20	11.4
Not Answered	2	1.1
Total	175	100.0

NI Context	
Age group	Percent of Farmers
Under 40	8%
40-49 years	19%
50-59 years	24%
60-64 years	13%
65 years and over	36%

NI Context Source: Equality Indicators for Northern Ireland Farmers Published 2018 (analysis using 2011 Census data)
https://www.daera-ni.gov.uk/publications/equality-indicators-report

Gender	Sample Total	Sample Percent	NI Context Percent
Male	147	84.0	91%
Female	18	10.3	9%
Other	1	0.6	
Prefer not to say	6	3.4	
Not Answered	3	1.7	
Total	175	100.0	

NI Context Source: Equality Indicators for Northern Ireland Farmers Published 2018 (analysis using 2011 Census data)
https://www.daera-ni.gov.uk/publications/equality-indicators-report

District Council	Sample Total	Sample Percent	NI Context Percent
Fermanagh and Omagh	33	18.9	20.5
Armagh City, Banbridge and Craigavon	20	11.4	13.1
Causeway Coast and Glens	19	10.9	10.1
Newry, Mourne and Down	18	10.3	15.6
Mid Ulster	15	8.6	16.7
Ards and North Down	13	7.4	2.8
Derry City and Strabane	13	7.4	7.1
Antrim and Newtownabbey	12	6.9	3.5
Mid and East Antrim	12	6.9	7.1
Lisburn and Castlereagh	8	4.6	3.4
Belfast City Council	0	0.0	0.1
Not Answered	12	6.9	
Total	175	100.0	

NI Context Source: Farm Census, 2019
Table 6.3 Number of farms by farm type by District Council in Northern Ireland, June 2019

Farm Type	Sample Total	Sample Percent	NI Context Percent
Beef and / or sheep	85	48.6	79%
Dairy	55	31.4	10%
Cereals and Horticulture	11	6.3	5%
Other and Mixed	11	6.3	3%
Poultry	1	0.6	3%
Pig	0	0.0	
Not Answered	12	6.9	
Total	175	100.0	

NI Context Source: Figure 2.3 Number of farms by farm type, Farm Census, 2019

Farming Technique	Sample Total	Sample Percent
Conventional	109	62.3
Intensive	32	18.3
Extensive	16	9.1
Not Answered	12	6.9
Organic	6	3.4
Total	175	100.0

Farming Classification	Sample Total	Sample Percent	NI Context
Severely Disadvantaged Area (ANC)	37	21.1	39.2
Disadvantaged Area	38	21.7	30.5
Lowland Area	79	45.1	
Not Answered	21	12.0	
Total	175	100.0	

NI Context Source: Farm Census, 2019
Table 7.1 Numbers of farms by type of farm and farm business size by LFA category in Northern Ireland, June 2019

Land Ownership	Sample Total	Sample Percent
Owned	141	80.6
Leased	18	10.3
Not Answered	16	9.1
Total	175	100.0

NI Context:
On average, 72.2% of farmland is owner occupied

Working Pattern	Sample Total	Sample Percent	NI Context
Full-time	86	49.1	55%
Part-time	66	37.7	45%
Don't work on farm	7	4.0	
Not Answered	16	9.1	
Total	175	100.0	

NI Context Source: Farm Census, 2019
Table 4.4 Number of farmers and workers by farm business size in Northern Ireland, June 2019

Farm Size Band	Farm Size Band	Sample Total	Sample Percent	NI Context Percent
Large	>= 100 hectares	30	17.1	8.2
Medium	< 100 >= 50 hectares	29	16.6	16.8
Small	< 50 hectares	65	37.1	75.0
Not answered		51	29.1	
Total		175	100.0	

NI Context Source: Farm Census, 2019
Table 4.2 Number and area of farms by total area farmed in Northern Ireland, June 2019

Educational Achievement	Sample Total	Sample Percent
School Education (left at 16 or before)	16	9.1
A' Levels/Leaving Certificate	8	4.6
Technical Qualifications (e.g. NVQs, HND etc.)	62	35.4
Degree	41	23.4
Postgraduate Degree	28	16.0
No Formal Qualifications	3	1.7
Other	3	1.7
Not Answered	14	8.0
Total	175	100.0