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Dame Meg Hillier MP *[by email]*
Chair of the Committee of Public Accounts,

From Tamara Finkelstein CB
Permanent Secretary

Dear Meg,

Re: ELM Farmer Opinion Tracker Results

I am writing following our earlier correspondence in May and June this year to share the latest results of our Farmer Opinion Tracker.

When we last exchanged letters, results from the latest survey (that ran for six weeks from 25th April 2022) were not available, and I committed to providing you with an update after the survey closed. On 28 July, we published the [survey results](#), so I am now able to provide more recent analysis.

Overall, the survey demonstrated progress in the number of farmers who understand Defra's vision for farming and have access to (or know where to access) the information they need to plan. The survey results also showed that an increasing number of farmers envisage needing to make changes to their businesses in the coming years and see Defra's payments for environmental outcomes as an important part of this. However, we recognise that we still have work to do to increase farmers' trust and confidence in Defra to deliver change. This will take time but we are committed to building trust by delivering quality schemes that work for farmers and by continuing to engage directly with the farming community.

Returning to the specific survey responses that you drew out in your previous letter, we are pleased to provide the latest updates below.

As mentioned, we continue to see a high level of farmer **understanding of Defra's vision for farming** that suggests farmers will be aware of the planned changes ahead and the sense of direction. The survey results also show continuation of an overall positive trend in the proportion of farmers who have the information that they need or know where to find it if they don't:

- Farmers on 66% of holdings said that they either fully (9%) or roughly (57%) understand Defra's vision for farming. This is an increase from 61% in October 2021 but broadly similar to April 2020 (67%).
- Farmers on 48% of holdings think they have all or most of the information they need to inform business planning, up from 37% in October 2021 and 30% in October 2020. A further 19% do not have any information but do know where to find it. Only 25% did not have any information and don't know where to find it, a decrease from 36% in October 2020.

We are also seeing evidence that farmers are increasingly **understanding the need to make changes to adapt** during the transition and indicating their intention to participate in the new environmental land management schemes:

- Farmers on 68% of holdings indicated that they would need to make changes to their farm business in the next 3 to 5 years, an increase from 64% in October 2021 and 54% in October 2020. Only 21% do not know what changes they need to make.
- Farmers on 80% of holdings said that Defra paying for environmental outcomes will be very (56%) or moderately (24%) important to their business in the future

The open text responses to the survey provide some positive indications to suggest that **engagement activities** undertaken by Future Farming and Countryside Programme colleagues have had a positive impact. This engagement includes official Defra communications channels, as well as many direct interactions with farmers at Trade and Country shows, or via the [Future Farming blog](#).

As we start to pilot and roll-out the core changes to schemes, we do note that **confidence amongst farmers** is not as high as we would like to see:

- Farmers on nearly two thirds of holdings (65%) are not at all confident that changes to schemes and regulations will lead to a successful future for farming, while 58% are not at all confident about Defra and its agencies' ability to work together to deliver planned changes to schemes and regulations. Though confidence levels are lower than we would like to see, both show small improvements since the October 2021 survey, where percentages were 68% and 66% respectively.

As noted in previous correspondence, these questions were new to the survey in October 2021, and as such we currently have a very small data set on which to provide analysis. We will continue to monitor these questions to determine the efficacy of communications and measures pertinent to these areas. We would like confidence in scheme changes to be closer to other measures of confidence in the industry, which reflect wider issues across the sector. The open text responses reflect a range of current pressures on businesses e.g. increasing input costs.

A small increase in **overall sentiment about individual farmers' future in farming** suggests a tentatively more positive outlook:

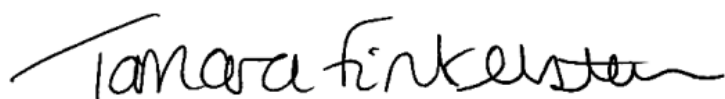
- Just under half of farmers on all holdings (47%) feel positive about their future in farming (7% very positive; 40% somewhat positive), marking a small increase from October 2021.

On 30 June, we launched the Sustainable Farming Incentive (SFI), the first of our new schemes under the umbrella of environmental land management offers. Any Basic Payment Scheme eligible farmer can now apply directly for SFI online. For any farmer already in existing agri-environment schemes or with common land, we streamlined the application process, simply requiring them to notify RPA of their wish to join the scheme. This controlled flow of applications will continue throughout the summer until all eligible farmers can apply to join SFI directly.

We will continue to increase the offers available to farmers and land managers over the coming years of the transition which will enable us to both boost productivity and support better environmental outcomes.

I look forward to further engagement with you to assure progress.

Yours sincerely,



TAMARA FINKELSTEIN CB
Permanent Secretary