



# Sustainability

## From Pressure to Partnership



*Insight that helps your organisation listen deeper and engage farmers on the issues that matter*

# Foreword

Sustainability is one of the defining conversations in British agriculture, yet it remains one of the most misunderstood. Across the sector, farmers are adapting, investing and innovating at a pace few outside the industry fully appreciate. At the same time, they face growing pressure from policy, markets and public expectation, often without recognition for the progress already being made.

This widening gap in understanding is not just a policy issue; it is a communications issue. But, it's also an opportunity for organisations seeking to better engage farmers and the agricultural sector.

## Pinstone Pulse has been created to help close that gap

As the first in our new insight tracker series, 'From pressure to partnership' brings clarity to how farmers think, feel and act on sustainability. It translates robust research into practical guidance for organisations seeking to engage farmers more effectively and with greater empathy.

The findings are clear. Farmers respond to credibility, to plain language and to real-world examples from farming peers and trusted advisers. They want stability and honesty in how sustainability is discussed and they want communications that start by recognising what is already working before asking for more. Above all, they value partnership over pressure.

For those working across the agricultural supply chain – corporates, advisory bodies, commercial businesses, membership organisations and policymakers – this report offers a route to more effective communications resulting in more meaningful conversations. It provides the insight needed to align messaging with farmer mindset, build trust, and support the industry's transition with confidence.

We hope this insight supports your pathway to more effective farmer engagement in a way that strengthens relationships, accelerates progress and supports a more resilient, sustainable future for British agriculture.



Catherine Lynch  
Managing Director, Pinstone

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## EXECUTIVE SUMMARY

### Engaging farmers to deliver sustainability, resilience and real change

#### THE PARADOX

Farmers are doing more for sustainability than ever before; **89% are actively improving soil health** and **61% are willing to make significant changes** to their farming approach, yet worryingly, **92% feel their efforts go unrecognised**. Those actively leading as sustainability champions are often the most pessimistic, reflecting a growing disconnection between policy ambition and on-the-ground reality.

#### THE CONTEXT

Our research reveals that trust, tone and timing are critical to engaging effectively with farmers. Variations in the type of farm, differences in the language used, and involvement with local networks, all shape how messages land. Farmers look first to peers, advisers and trade media for validation, while digital channels like search and social are increasingly influential, particularly for younger audiences.

#### THE MOTIVATORS

Beyond compliance or policy pressure, farmers are driven by a dual sense of profit and purpose. It is a fine balance between income security and considered stewardship of the land for future generations. These two primary motivations must be acknowledged equally if sustainability is to accelerate throughout the sector.

#### THE OPPORTUNITY

With 85% of farmers saying they would make greater changes given the right financial support, the opportunity for agribusiness and industry is clear: actively partner with farmers and support what's already working, rather than imposing greater pressures to perform. Our analysis highlights five essential shifts that will enable organisations to engage farmers more effectively, focusing on recognition, stability, economic alignment, peer-to-peer proof, and clear, practical communication.

### The five shifts needed to move from pressure to partnership

1.

#### Plain language & detailed insight

Communicate simply, but back it up with substance.

2.

#### Peer-powered proof

Enable farmers to showcase success through real-world examples.

3.

#### Recognition before demand

Celebrate what farmers are already doing to build trust.

4.

#### Profit-aligned purpose

Link sustainability goals to commercial performance.

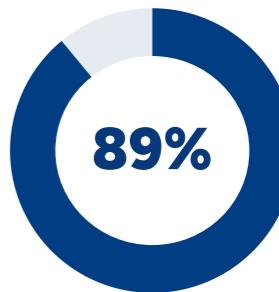
5.

#### Stability over speed

Policy consistency matters more than new incentives.

**Strategic, issue-led communication is essential.**

#### KEY STATS AT A GLANCE...



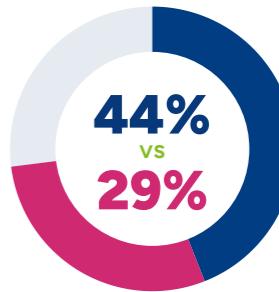
89% are actively improving soil health



92% feel their effort goes unrecognised



61% are willing to make significant changes



44% feel optimistic vs 29% pessimistic about the future



## THE LANGUAGE OF SUSTAINABILITY

### How you say it matters as much as what you say

When it comes to engaging farmers, words make or break the message.

Using the right language builds connection and resonates. Phrases like 'farming with nature' and 'sustainable farming practices' inspire action and pride. But the wrong words; 'net zero', 'climate emergency', or other jargon-heavy terms, can shut conversations down before they start.

*It's not about softening the science; it's about speaking farmers' language, being practical, positive and rooted in real farming, using voices they trust.*

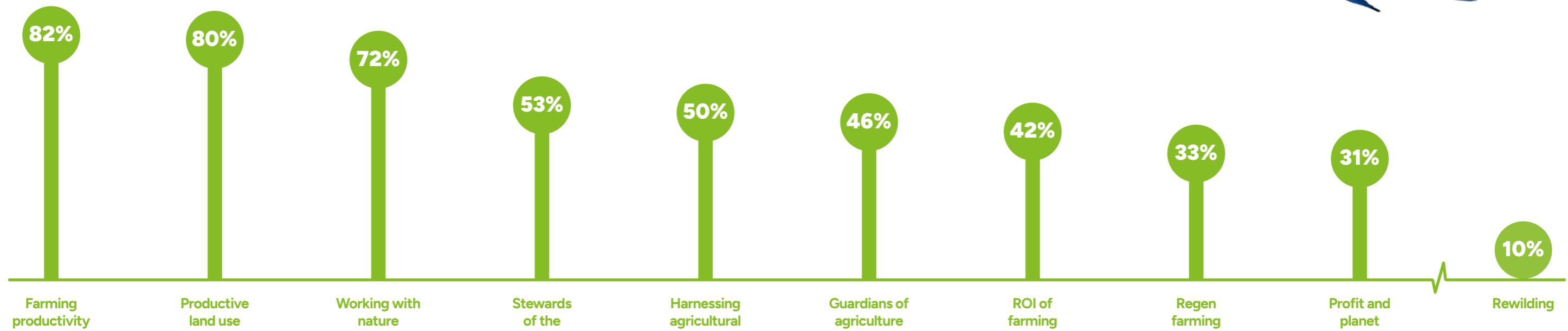


### Topics around productivity and productive land would engage more farmers

### Be careful with the 'S' word when communicating with farmers



% of farmers who engage positively with the following terms

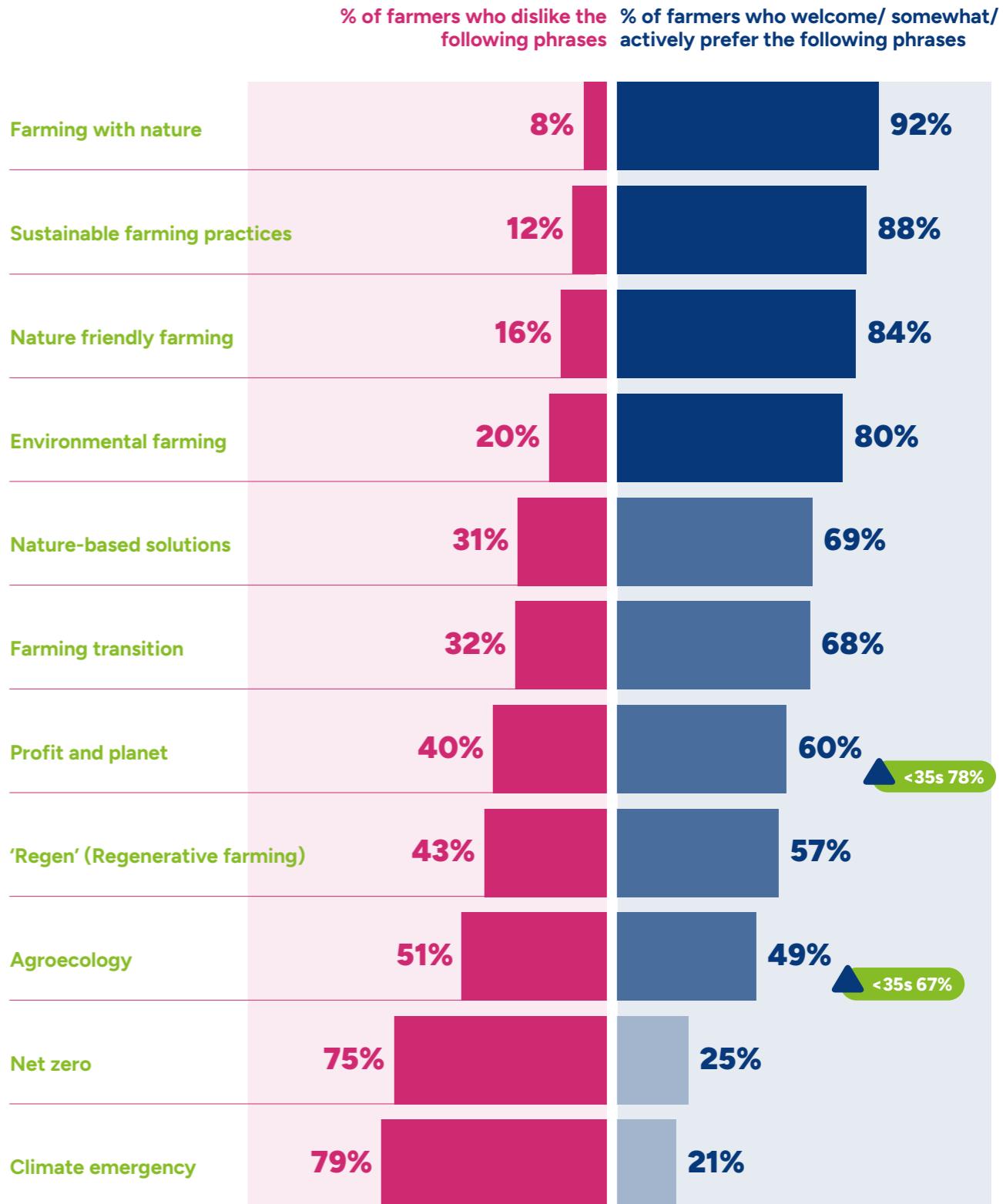


► Base – Q20. Thinking still around how information on sustainability is communicated to you. Which, if any, of the following phrases do you relate to or find engaging? Total: n=344



## THE LANGUAGE OF SUSTAINABILITY

### Key phrases that farmers are more likely to engage with





## COMMUNICATION PRINCIPLES THAT BUILD TRUST

### Language matters

Earning farmers' trust isn't about spin; it's about speaking their language and showing you're on their side and understand them.

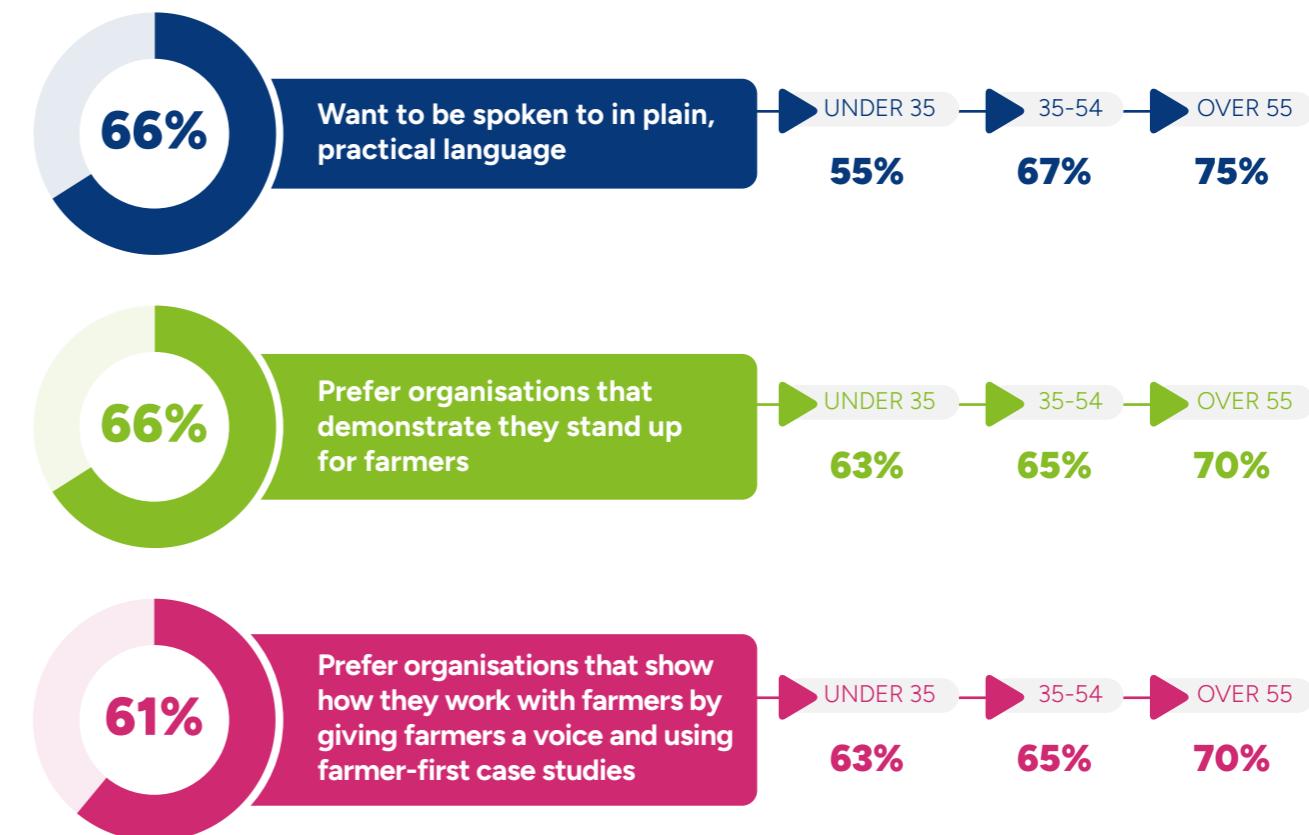
Farmers want plain, practical communication, backed by real examples from the field. They respect organisations that stand up for them, not talk down to them, and they value proof over promises.

The detail matters too. While older farmers prefer simple, no-nonsense messages, younger generations are hungry for technical depth. There is a need to balance both.

The formula for creating trust through your communications starts with being authentic, practical, and farmer-first.



### Standing up for farmers and using simple language is key for engagement – particularly older farmers



► Base – Q18. Thinking about the way organisations communicate to you regarding your farm. Which of the following are important for organisations to demonstrate to gain your trust and respect? Total: n=344

## THE CHANGING MEDIA LANDSCAPE

Farming's media landscape and the accessibility of information is shifting fast. AI is changing the online space dramatically, but the old guard and traditional media still matter.

The top three places farmers turn to for advice is **advisers (54%)**, **trade media (51%)** and **fellow farmers (50%)** demonstrating the need for credible PR and stakeholder relations in any engagement campaign.

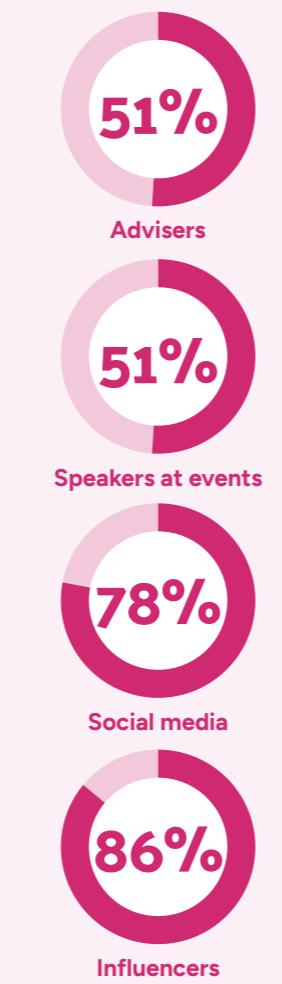
Farmers are now leaning more heavily on **advisers (51%)** and independent experts **speaking at events (51%)** and looking to them in the trade media more than ever before, while at the same time **social media (78%)** and **online influencers (86%)** are gaining ground, especially among younger generations.

Digital channels are opening new doors, but credible media still rules. The winning formula for communication must marry trusted voices with traditional and digital platforms to keep farmers both informed and inspired.

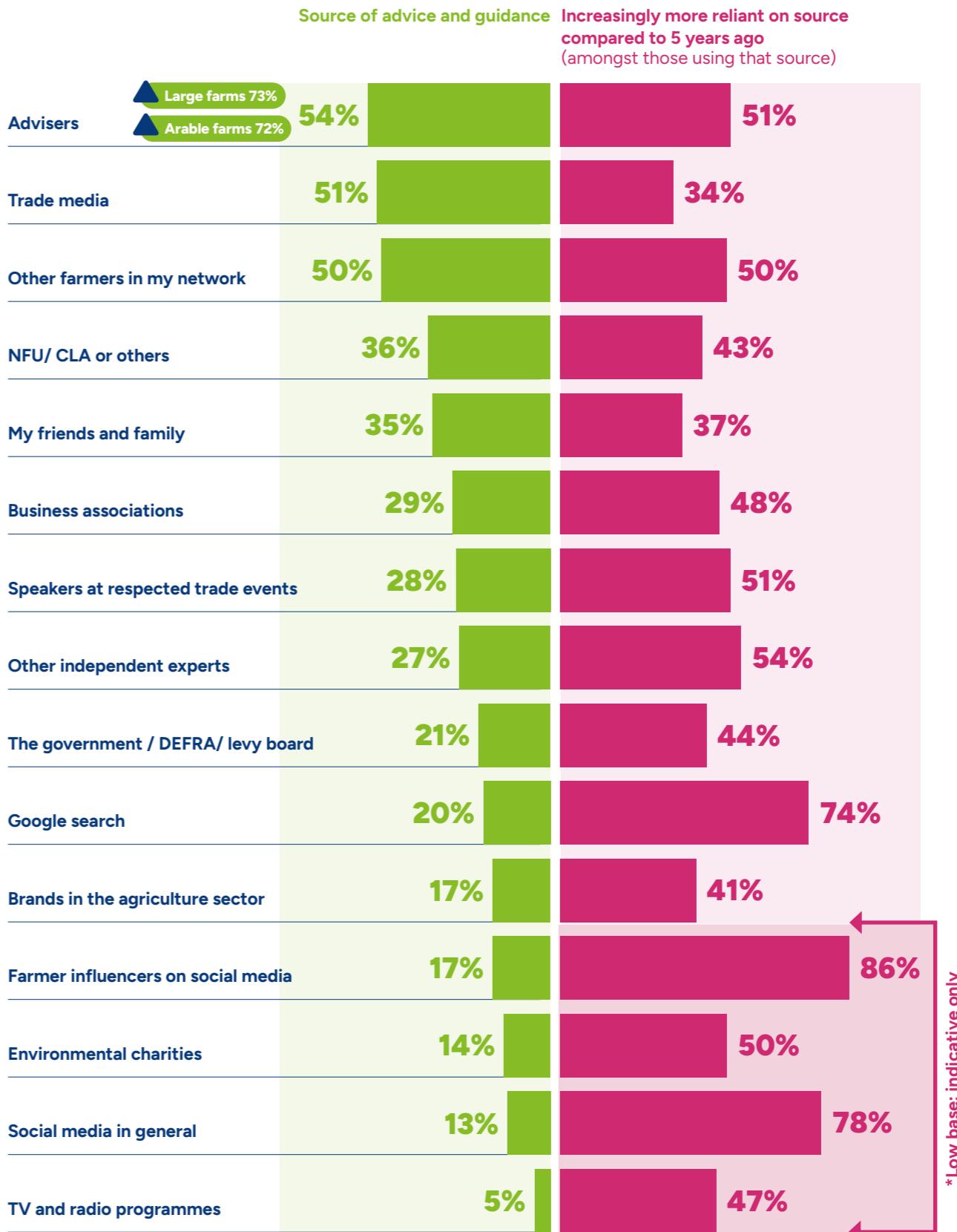
THE TOP THREE PLACES FARMERS TURN TO FOR ADVICE...



FARMERS ARE NOW LEANING MORE HEAVILY ON...



**Farmers default to advisers and peers for advice but the reliance on all sources is typically increasing**



► Base – Q21. Where do you typically turn to for sources or advice and guidance for your farm?; Q21B. And which sources are you relying upon more, or less, than you were 5 years ago? Total: n=344

## HOW FARMERS REALLY FEEL

### Striking a balance between optimism and pessimism

Behind the data lies deep-rooted emotion, and for farmers, the sustainability of their farms and their land is an intensely personal subject.

Almost half feel optimistic about the sector's ability to rise to the challenge, but nearly a third lean towards a pessimistic outlook, weighed down by shifting expectations and limited recognition.

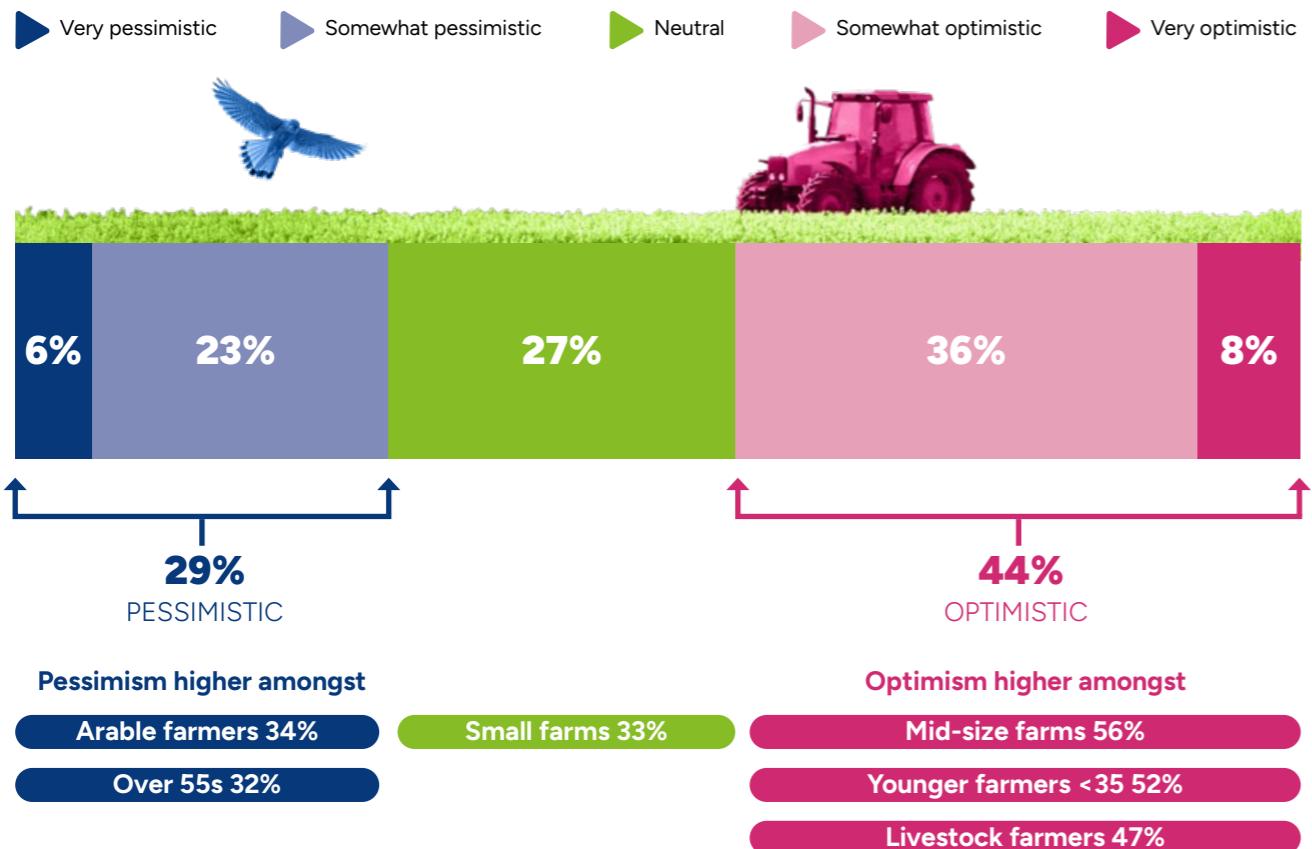
Strikingly, it's often those doing the most who feel the least hopeful - proof that effort without validation only serves to breed frustration.

Younger farmers tend to see the progress that lies ahead more readily, while more experienced farmers are wary of promises without payoff. While optimism remains, farmers are receptive to overcoming the perceived challenges. Effective communications is the way we will engage them.

**Farmers need recognition, reassurance and realistic milestones to keep optimism alive.**



### Despite the challenges, farmers generally feel optimistic about the ability to address sustainability challenges



► Base – Q7 How optimistic are you about the farming sectors' ability to address sustainability challenges? Total: n=344

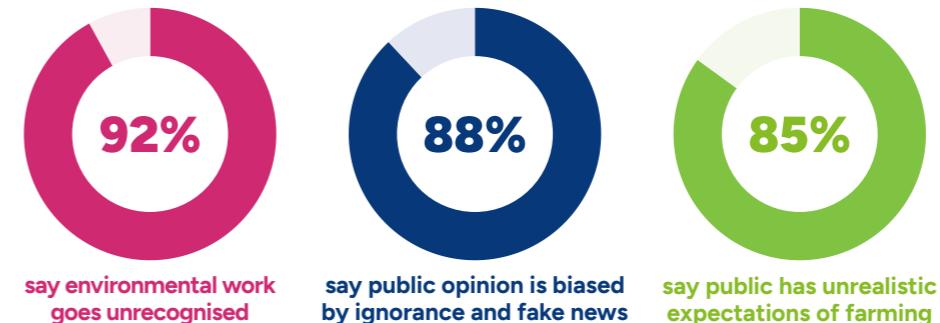
### The recognition crisis

Farmers are delivering real change in some instances, but they feel the industry and consumers aren't paying attention.

An overwhelming 92% say their environmental work goes unrecognised, 85% believe the public expects too much, and 88% feel judged by misinformation.

As one farmer said: "We're doing the work, but carrying the blame."

This disconnect cuts deep. Farmers aren't asking for praise, just fairness. The challenge for communicators is clear - stop demanding more before recognising how much is already being done.



**We're „  
doing the  
work, but  
carrying  
the blame.**



### Farmers feel undervalued and frustrated



► Base – Q8b How much do you agree or disagree with the following statements about farming and sustainability? Total: n=344

## WHAT WOULD HELP FARMERS MOVE FASTER?

### How can we inspire change?

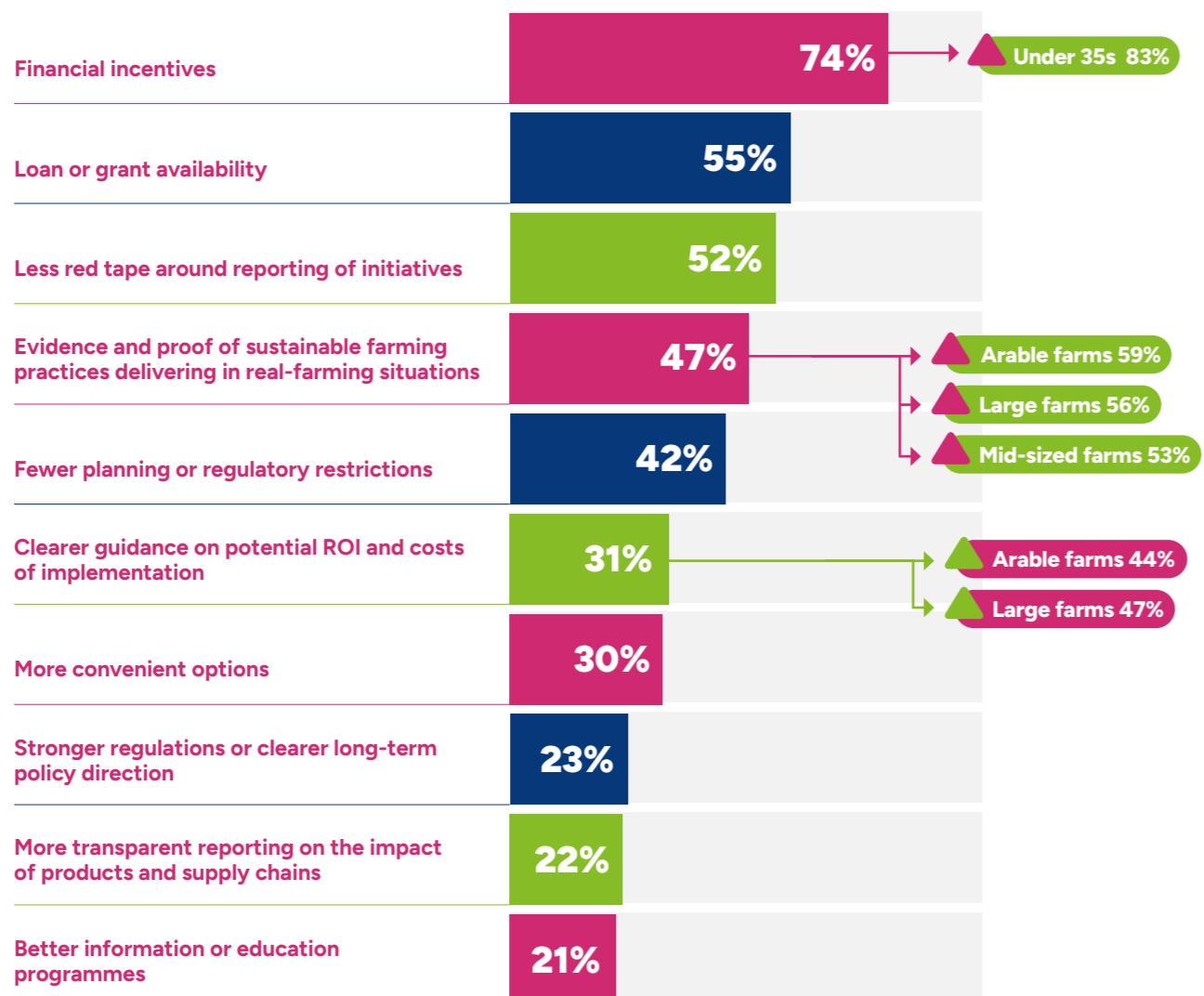
Farmers have made it clear - they're ready to do more, but they need the right support to make it happen.

Money, clarity and proof top the list of requirements with three-quarters saying financial incentives would accelerate change, while over half want access to grants and less red tape.

And almost half are asking for something simple but powerful – real evidence from real farms – peer to peer proof that sustainability delivers real-term benefits.

*It paints a clear message. Don't tell farmers what to do. Show them what works.*

### Financial support is the most direct form of support for quick adoption



► Base – Q14. What would make you more likely to adopt sustainable farming practices more quickly? Total: n=344

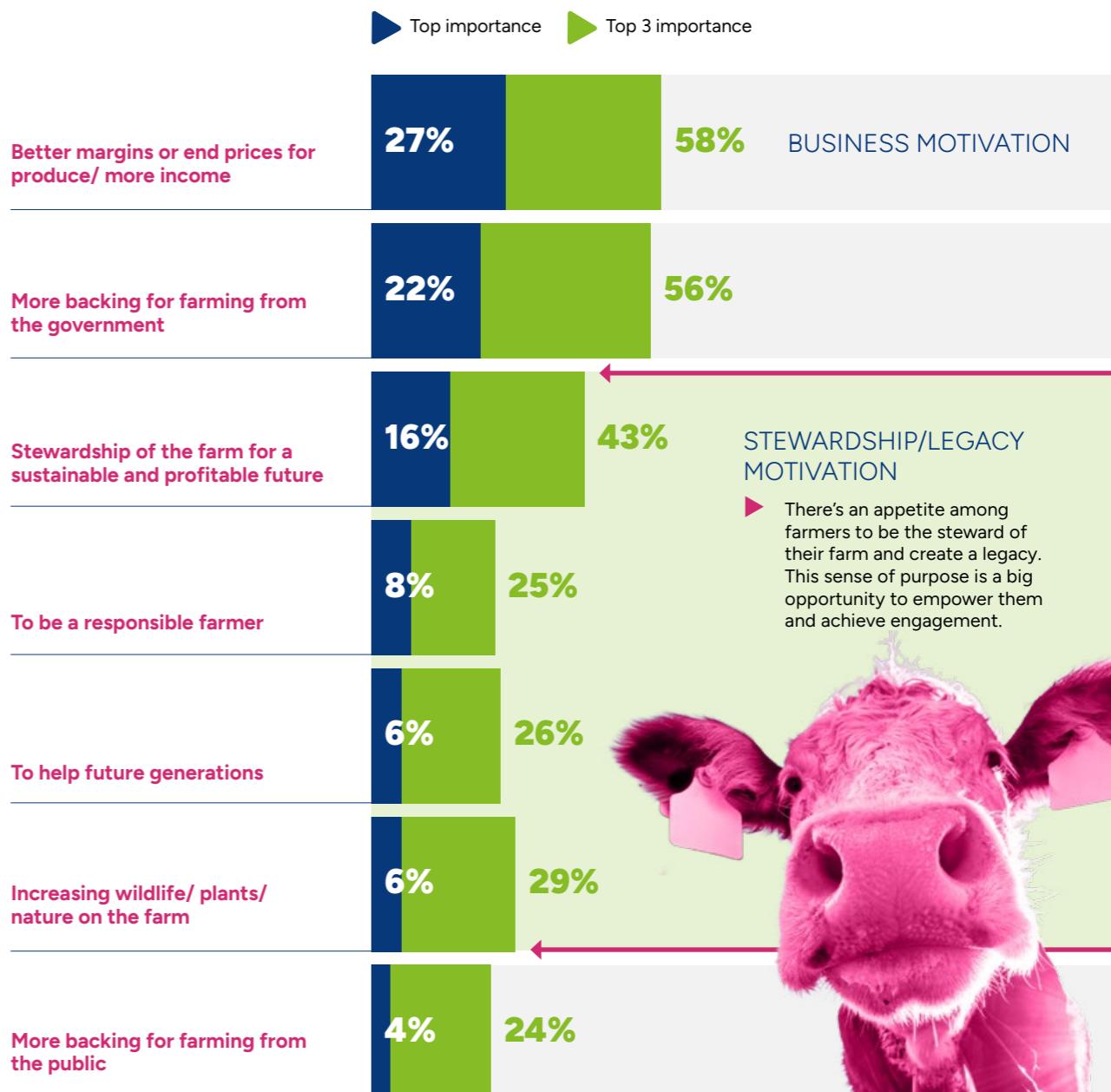
### What motivates farmers to change?

For most farmers, sustainability starts with survival. The old adage 'you can't go green if you're in the red' rings true now more than ever before.

The biggest driver is the bottom line, better margins and stronger income, but purpose matters too. Farmers are motivated by stewardship, responsibility, and legacy - not ideology.

Real change happens when profit and purpose align. We need to show that sustainability makes good business sense and builds a farming future worth passing on.

### Farmers are motivated to change for commercial income and a sense of stewardship



► Base – Q12. Thinking about what would motivate you to adopt more sustainable practices on your farm, which of the following would drive you to adopt? Total: n=344

## WHO FARMERS TRUST

### Who is in the circle of trust for farmers?

In farming, trust is everything, and it's earned, not assumed.

Farmers place their confidence close to home, and fellow farming peers and professional advisers sit at the centre of influence, while trade media and industry bodies form the next ring of trust.

Beyond that, confidence collapses, with just 5% viewing government as a credible voice or someone to trust on sustainability.

Digital sources, from Google searches to social media influencers, are on the rise, highlighting that while the message and access to it are important, the messenger matters even more.

**Other farmers and advisers are the most respected and trusted voices in the topic of sustainability**

*Farmers will trust communications where other farmers and advisers are given a voice.*



► Base – Q16. Who do you respect as a voice in sustainability and farming? Total: n=344

## FARMERS ARE DOING A LOT

### The on-farm reality

Across British farms sustainability isn't a future ambition, it's already a reality in many instances. On average farmers are implementing eight different sustainable practices, from soil and nutrient management to biodiversity enhancement, and waste reduction. This average rises to 9.6 sustainable practices for arable farms, 9.5 for large farms and 8.2 for medium-sized farms.

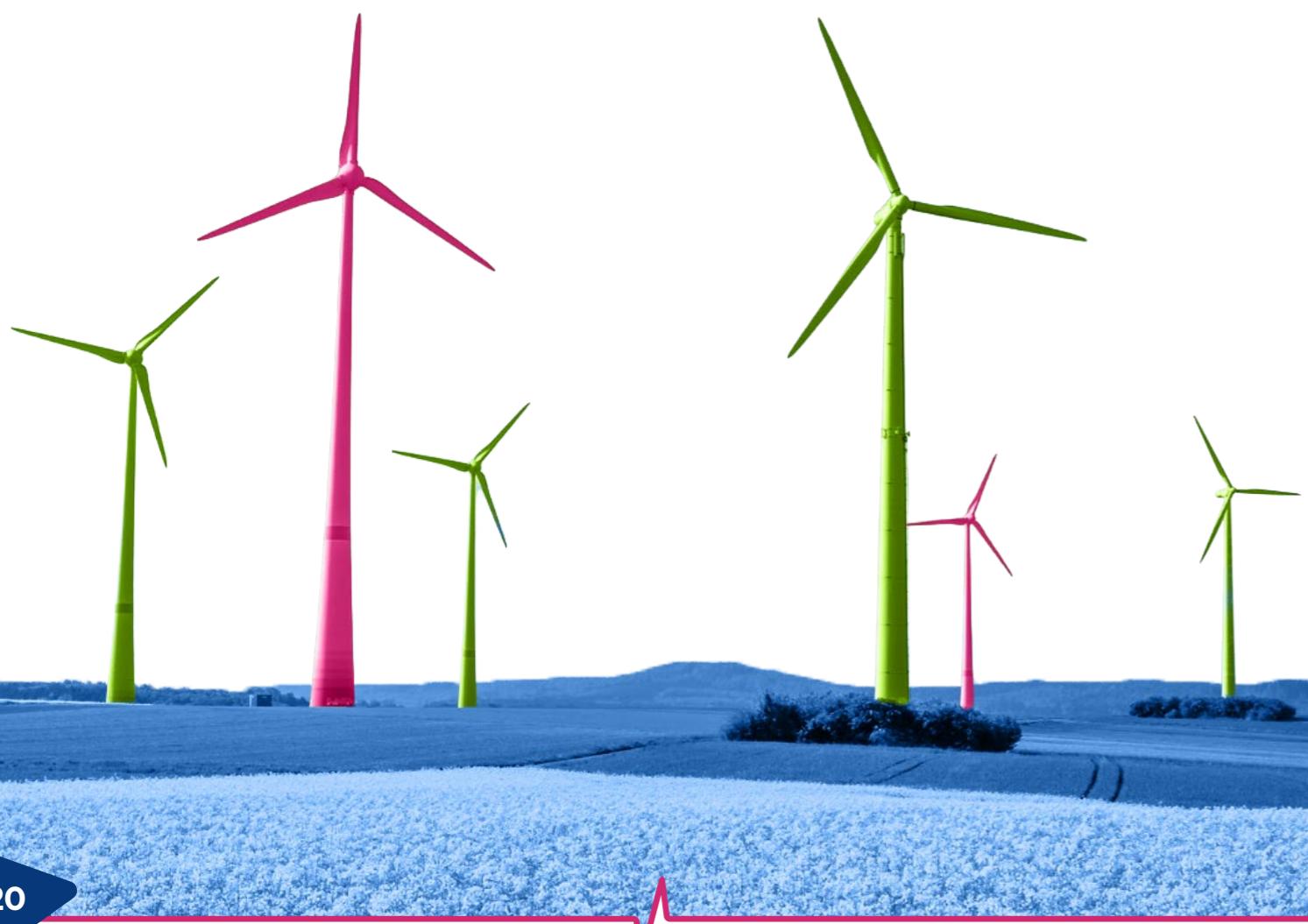
Yet despite this practical on-the-ground action, four in five farmers say their efforts go unnoticed.

Farmers agree that their contribution to sustainability is negatively skewed due to inaccurate reporting of information, and the public having unrealistic expectations or lack of understanding about modern farming practices.

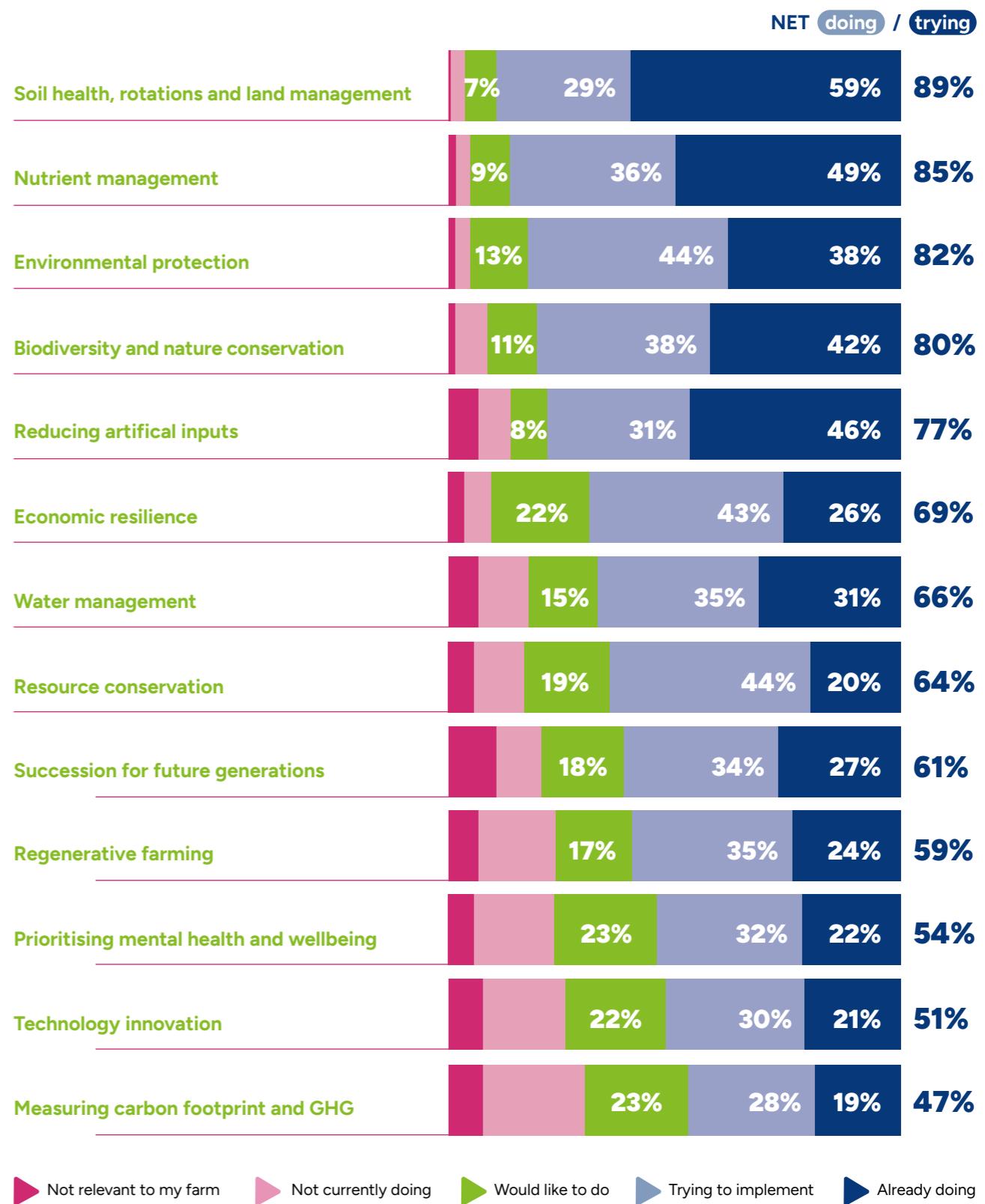
Farmers are proving that change is possible. They are keen for the industry to partner with them, to recognise the progress already underway, and to help them accelerate positive change.

#### Average amount of individual sustainable practices:

- 8 for all farms
- 9.6 for arable farms
- 9.5 for large farms
- 8.2 for medium-sized farms



### Farmers are adopting a wide range of varying farming practices and approaches



► Base – Q5B. For each of the following farming practices or approaches, please share what you are currently already doing on your farm?  
Total- n=344

## WHAT FARMERS UNDERSTAND BEST

### The knowledge gap

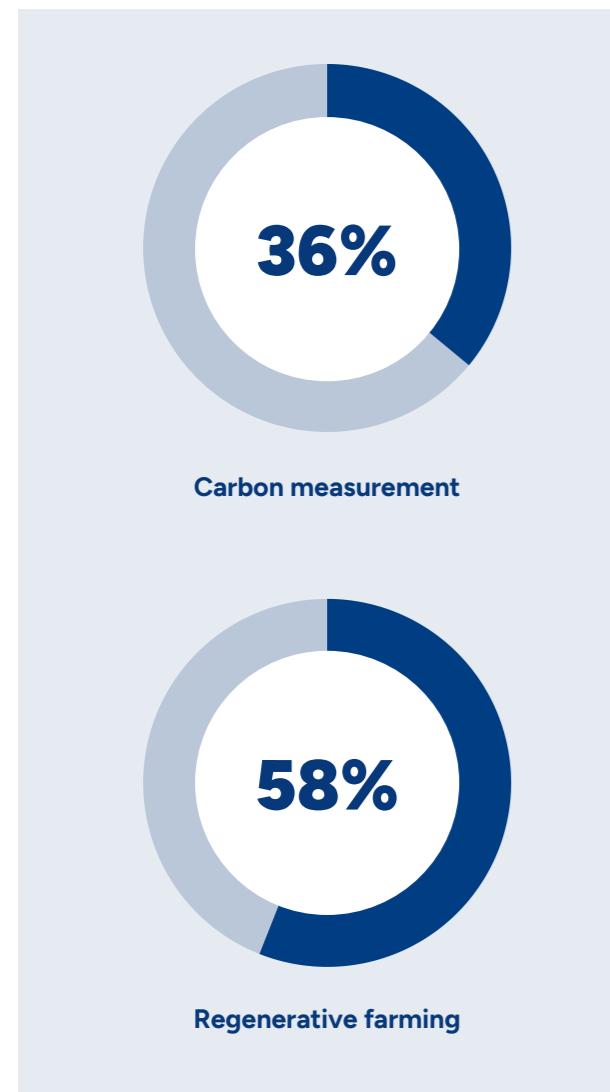
Farmers have deep practical know-how, but a comprehensive understanding of sustainability isn't evenly spread. While most grasp the concepts of soil health and biodiversity, other areas, like **carbon measurement (36%)** and **technology innovation (56%)**, remain less familiar territory.

This creates a clear knowledge gap, even among those already implementing sustainable practices. Four in ten lack detailed understanding about regenerative farming, for example.

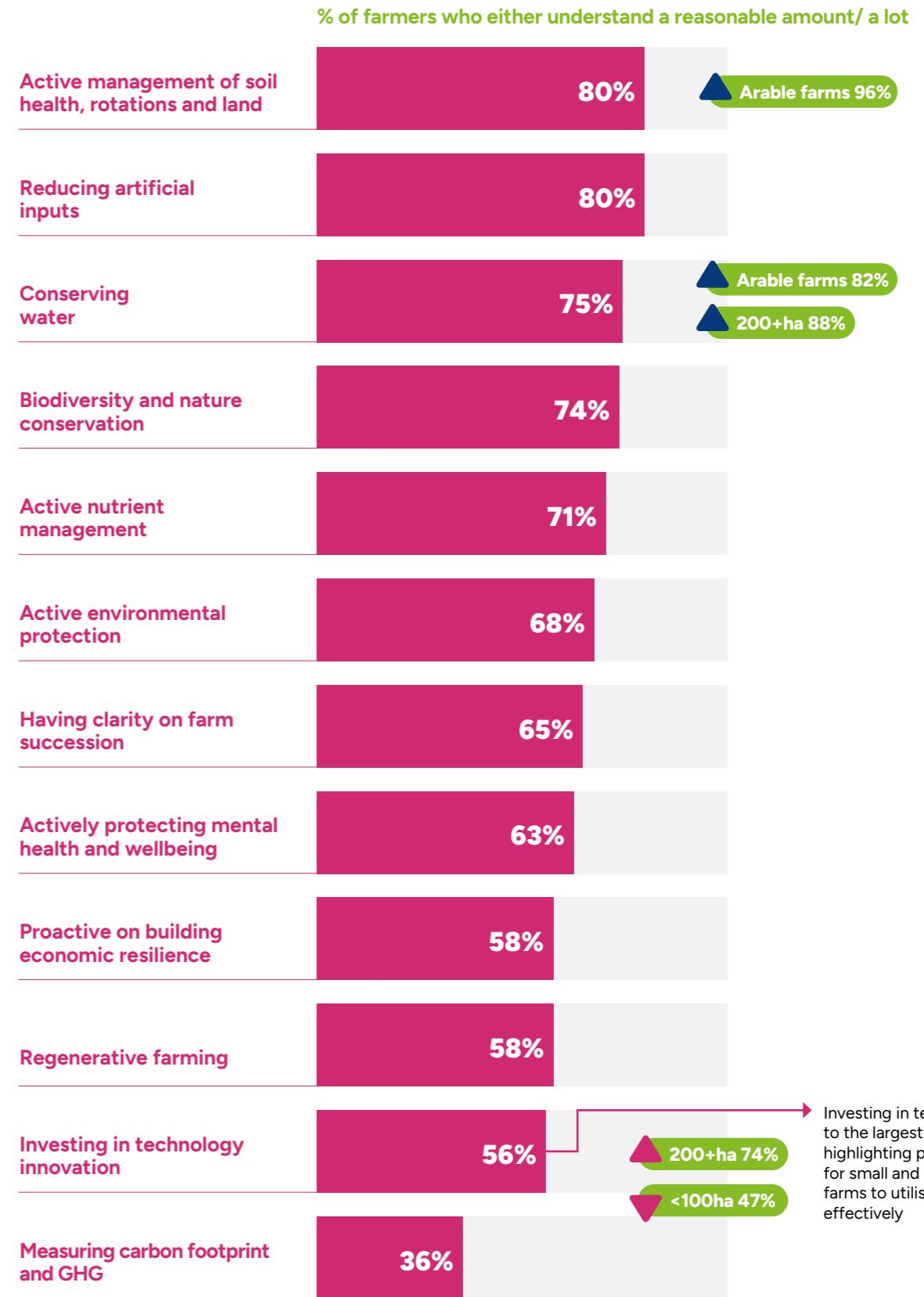
And when it comes to innovation, a tech divide is emerging, with **larger farms (74%)** racing ahead while **smaller holdings (47%)** risk being left behind.

Closing that gap with informed communications could be a key driver of advancement across British agriculture.

### Farmers' understanding of certain aspects of sustainability



### There is scope to educate farmers on a whole range of sustainability issues



► Base – Q4 How well do you understand the following areas of sustainability? Total: n=344

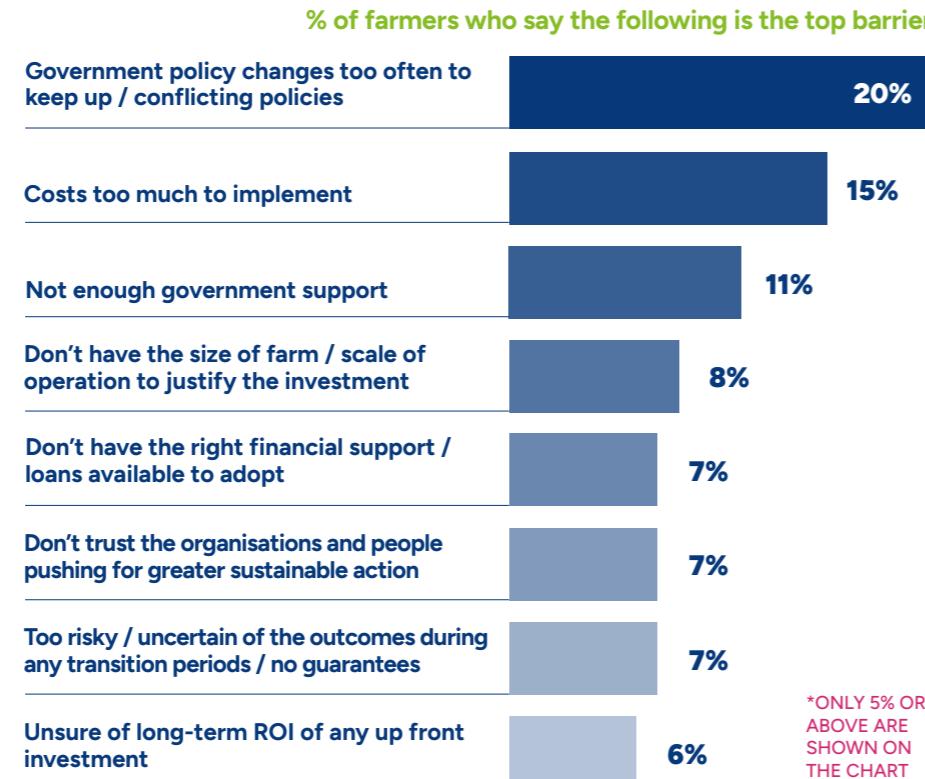
## THE BARRIERS HOLDING FARMERS BACK

### The will to act is there

Farmers are willing to adapt how they operate, but real-world barriers stand in the way, day-in day-out.

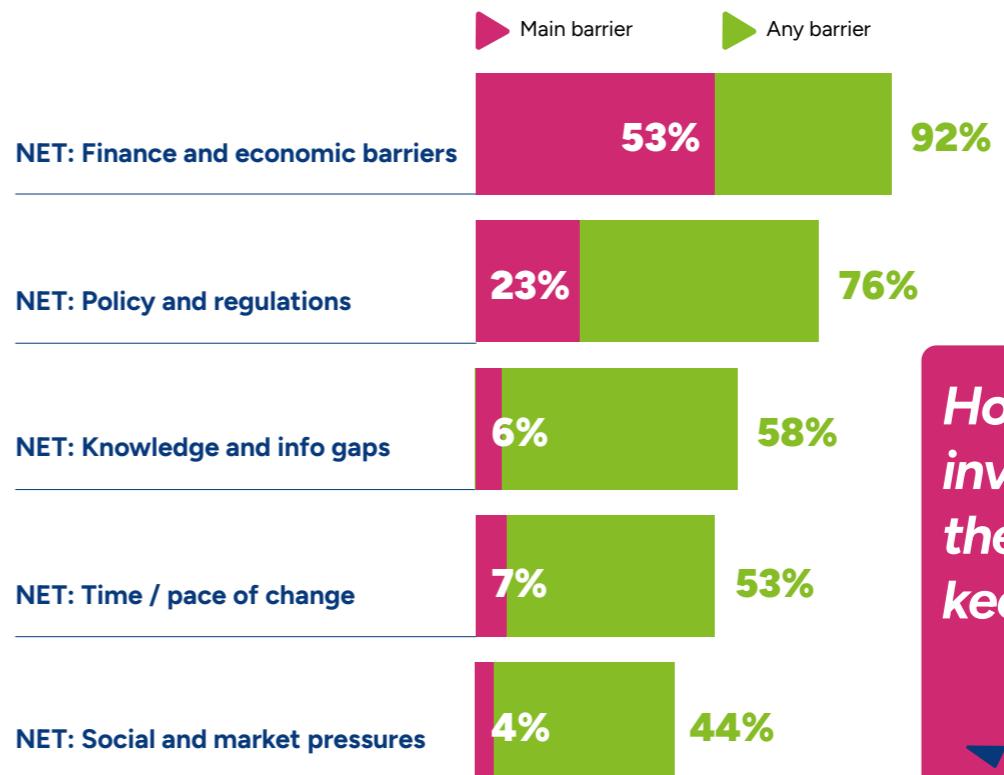
Top of the obstacle list is finance; **9 in 10 say economic pressures make sustainable change hard to justify**. Add in constant policy shifts, knowledge gaps, and the sheer pace of change expected, and it's clear why progress can frequently stall.

The will to act is there, but without stability, support and clarity, many farmers are left feeling it's just too risky to take the next step towards sustainability.



► Base – Q10B. Of the barriers listed, what is the top barrier that gets in the way of you doing more to create a more sustainable farm? Total: n=344

### Financial and regulatory challenges are often the barrier to doing more



► Base – Q10B. Of the barriers listed, what is the top barrier that gets in the way of you doing more to create a more sustainable farm? Total: n=344

**How can I invest when the goalposts keep moving?**





For many farmers, the fear isn't change itself, it's what comes after.

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## THE RISK FACTOR

### Uncertainty and instability

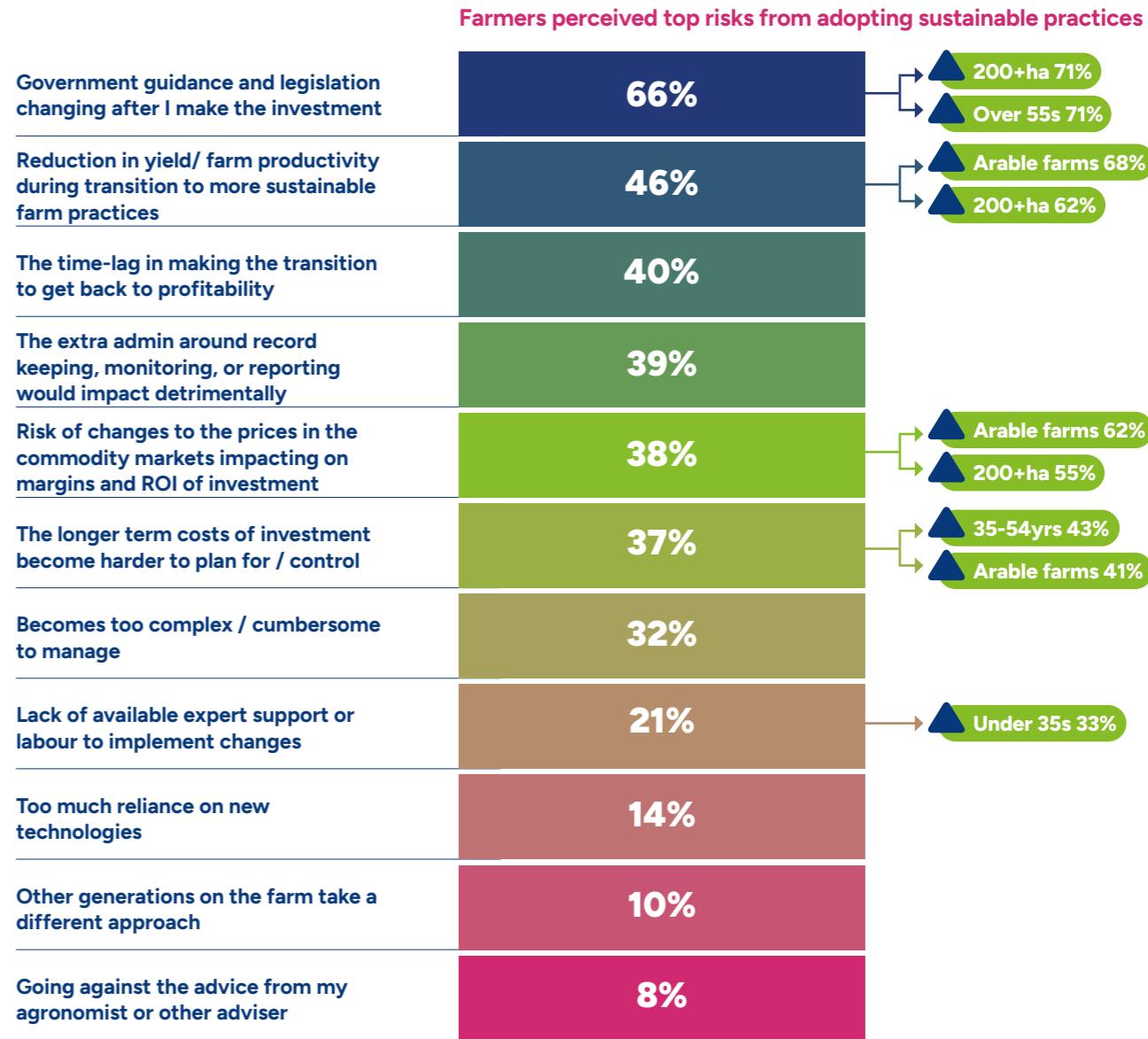
For many farmers, the fear isn't change itself, it's what comes after.

Top concerns centre on uncertainty and instability; two-thirds worry government rules will shift once investments are made, while others fear yield losses and a long wait until profitability is secured.

The risks are all too apparent, but the rewards are not always as tangible. Often the desire to act is hampered by a political system that feels unpredictable.

For arable and larger farms, the stakes are even higher. With bigger investments on the line, the cost of getting it wrong can outweigh the promise of getting it right.

### Farmers are naturally nervous about the risks of change



► Base – Q11. Which, if any, of the following risks would you be mindful of when transitioning to more sustainable farming practices? Total: n=344

## THE FIVE SHIFTS NEEDED

### Changes required to effectively communicate with farmers on sustainability

The message from farmers is loud and clear: **they are willing to make changes to how their farm is run to be more sustainable (61%)**. With the right **financial incentives**, this jumps up to **85%**

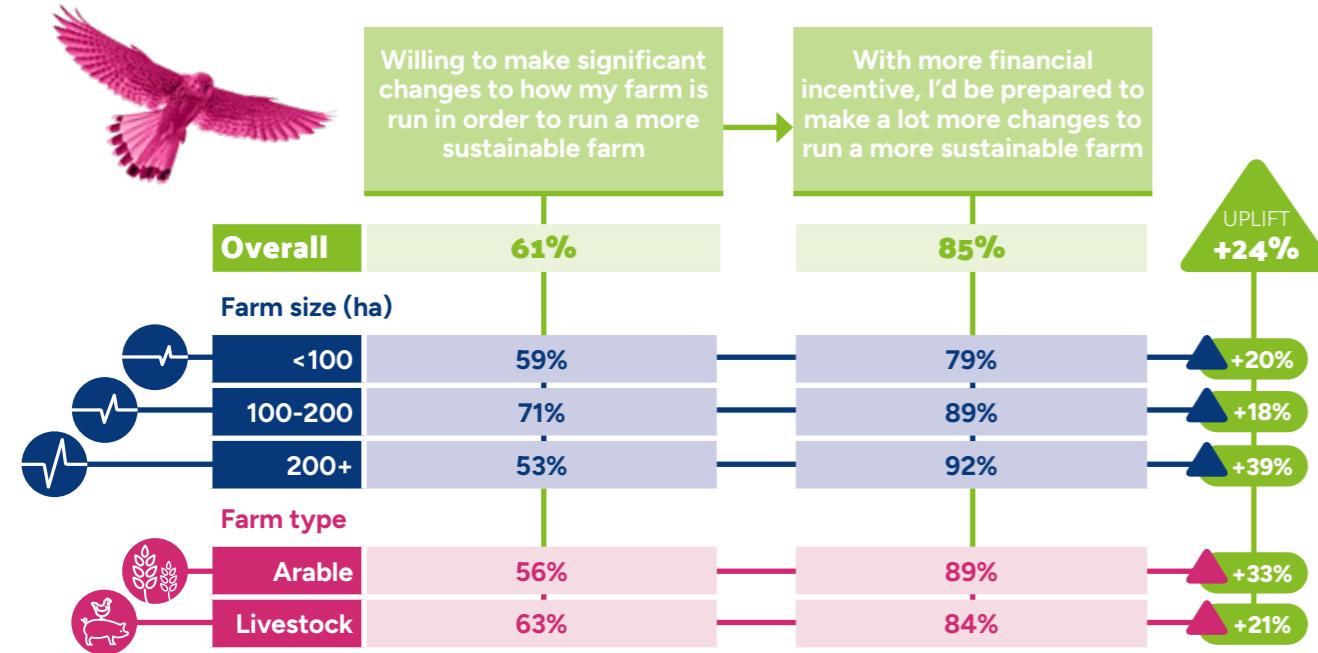
They don't need more pressure; they want partnerships that facilitate action.

Real progress won't come from pushing harder, but from changing how the industry listens, supports and communicates.

Across the findings, five powerful shifts emerge, from actively recognising what farmers are already doing, to proving that change works in the real world.

Together, these shifts mark the path from fatigue to momentum, mistrust to collaboration, and pressure to partnership.

### Most farmers are willing to make changes to embrace sustainability



► Base – Q8b How much do you agree or disagree with the following statements about farming and sustainability? Total: n=344, Arable farms= 71, Livestock farms= 256, Small farms= 174, Medium farms= 93, Large farms=77

### What this means for communications

Turning this insight into action means rethinking how the industry talks with farmers, not at them.

For everyone who wants to engage with farmers, the goal should be the same; to build trust, be relevant and showcase the results that are possible when you partner with farmers.

Lead with ROI and real stories, not jargon. Recognise progress before asking for more, and make every message simple, relatable and farmer-first.

To drive real change, understanding and insight are essential in developing meaningful, effective communications that build reputation.

**Our experience, backed by the data, proves that impactful engagement with farmers relies on a few simple but robust principles:**

- Offer stability and clear practical pathways for change
- Acknowledge farmer progress before asking for more
- Use peer-to-peer farmer testimonials authentically
- Frame farmers as solution-holders, not problems
- Provide technical depth for those who want it
- Avoid jargon and keep language clear
- Bridge the public understanding gap
- Lead with ROI and productivity
- Amplify diverse farmer voices



# Conclusion

## The opportunity ahead

With 61% of farmers willing to make significant changes to run a more sustainable farm, and 85% ready to go further with the right support, the opportunity for a faster transition to a more sustainable agricultural industry is evident. We don't need to convince farmers to change, but instead we need to listen deeper to what's really driving their decisions and support and accelerate the progress already underway.

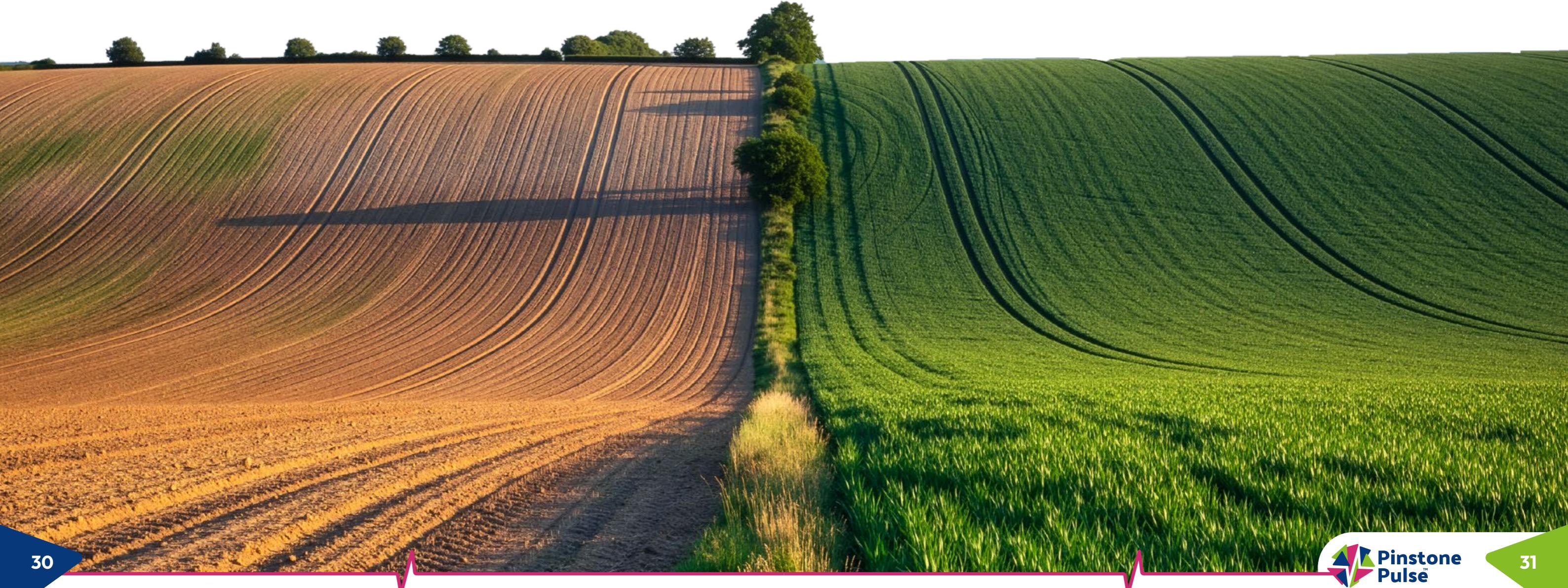
Our findings show that meaningful change happens when the industry shifts from pressure to partnership; this can be achieved by recognising the work farmers already do, offering stability, aligning purpose with profit, and proving what works through real-world examples from the field.

Farmers respond best when communication reflects their lived reality, not distant expectations.

That's why strategic, issue-led communication is essential. Organisations that ground their engagement in genuine farmer insight and are empathetic to farmers' motivations, barriers, trusted voices and preferred language will achieve far greater resonance and credibility. When you truly understand the farmer mindset, you can shape messages that cut through, build trust and drive action.

At Pinstone, we turn that insight into effective communications that cultivate your reputation, ensuring your organisation speaks farmers' language, shows you're on their side, and engages on the issues that really matter.

What happens next depends on how everyone responds to build trust, collaborate and communicate in a way that shows the industry is listening and truly connecting with farmers.



### At Pinstone, we turn insight into influence

We're a specialist PR and communications agency working across the food, farming and environment sectors, helping organisations build reputation, engagement and impact from the ground up.

For more than 20 years, we've been shaping the stories that move the industry forward, from farmyard to boardroom, combining deep sector knowledge with creative communications that cut through complexity and inspire change.

Certified as a B Corp and proud of our award-winning track record, we partner with everyone from leading corporates to independent businesses and membership organisations.



#### What sets us apart is our approach:

- ▶ Insight-led strategy grounded in real farmer understanding
- ▶ Integrated campaigns spanning PR, digital, stakeholder and media engagement
- ▶ Transparent delivery and measurable results that build trust and long-term value

**At Pinstone, we don't just talk about change, we tell compelling stories that inspire change, shape policy, and strengthen reputation.**

### About Pinstone Pulse

Pinstone Pulse takes the temperature of sector opinion, giving you the insight you need to communicate with farming audiences in ways that truly resonate.

Built on robust research and decades of sector experience, Pinstone Pulse uncovers what key stakeholders think, feel and do, and how brands, industry bodies and policymakers can engage them more effectively.

Designed as a regular insight tracker, it helps organisations stay ahead of emerging trends, build trust, and shape messages that drive real behaviour change.

Engage with Pinstone Pulse to access exclusive farmer insight to guide strategy and campaigns at the same time as understanding the motivators and barriers behind farmer decision-making.

Brought to you by Pinstone, the UK's leading specialist PR agency for farming, food and the environment.



## METHODOLOGY

### About this research

This study surveyed 344 British farmers in 2025 through the Opinion Harvester panel - the UK's largest verified online farmer community.

The survey explored farmers' perceptions, motivations and barriers around sustainable and regenerative practices. These include how they define sustainability, which messages resonate, who they trust, and what would help them accelerate change.

The quantitative online survey had a 15-minute average completion time and was designed by Pinstone and Potentia / Disrupt in line with MRS and MRQSA standards. Sub-group analysis was conducted by farm type, size, region and farmer age with statistically significant differences identified throughout the report. Coverage was across all UK regions, ensuring insight into geographical and enterprise variation.

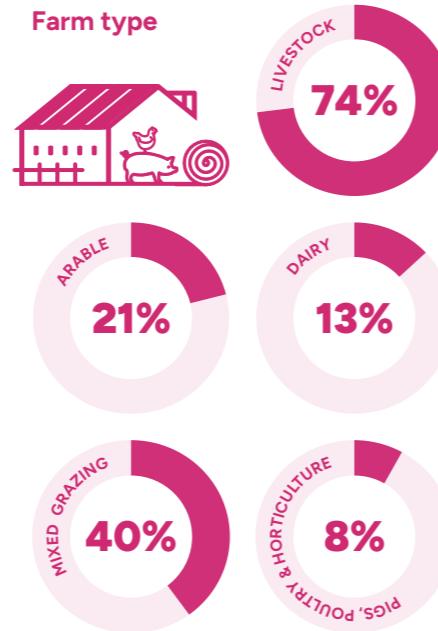
#### ABOUT THE PINSTONE PULSE INSIGHT SERIES

'From Pressure to Partnership' is the first Pinstone Pulse insight tracker, designed to help agri, food supply and environmental businesses and industry leaders stay in tune with evolving audience mindsets. Regularly, Pinstone Pulse will provide refreshed data, insight and analysis to inform PR, marketing and communication strategies, supporting a shared vision for a resilient and productive farming, food and environment sector.

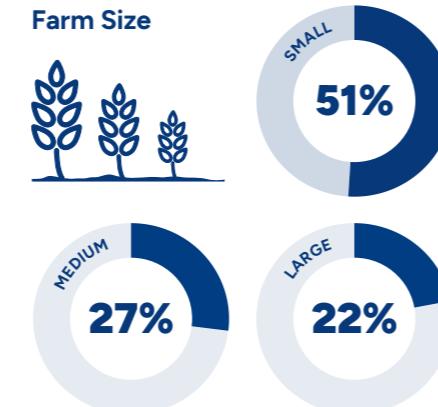


#### ROBUST REPRESENTATION

##### Farm type



##### Farm Size



##### Age profile

