Final Program Survey:

Argentina Intellectual Property Rights Outreach Project

November 1, 2013

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INTRODUCTION & BACKGROUND

The American Seed Trade Association's (ASTA) mission is to be an effective voice of action in all matters concerning the development, marketing and movement of seed, associated products and services throughout the world. ASTA promotes the development of better seed to produce better crops for a better quality of life. Founded in 1883, ASTA is one of the oldest trade organizations in the United States. Its membership consists of over 700 companies involved in seed production and distribution, plant breeding, and related industries in North America. As an authority on plant germplasm, ASTA advocates science and policy issues of industry-wide importance.

ASTA utilized USDA Market Access Program (MAP) funding to support an industry goal to improve understanding, respect, legal frameworks and enforcement of intellectual property rights (IPR) for seed innovation. In 2009, ASTA initiated the Argentina Intellectual Property Rights Outreach Project (M09GXMAP01, M10GXMAP01, M11GXMAP01), an ongoing communication outreach strategy in Argentina focused on IPR in the seed industry.

Since 2009, ASTA has committed MAP funding to change farmer attitudes toward purchasing legal seed versus brown bag and/or paying royalties on farm saved seed thus supporting the U.S. seed industry's investment in and export to the Argentine market. Without advocacy for the IPR of seed in Argentina and recognition of the value of purchasing legal seed, U.S. companies will continue to lose on their investments on seed for Argentina and will no longer have a viable market. Therefore, the program focused on influencing Argentine stakeholders through one consistent voice of the seed industry to encourage respect of IPR in seed through adaptive change in the beliefs held about the value IPR creates for all stakeholders.

The goal of the program was twofold: 1) to bring better understanding to Argentine stakeholders, in particular farmers, about the value of IPR, the role of IPR in continued investment in further seed innovation, and the benefit of purchased seed and/or paid royalties to the agricultural sector as a whole; and 2) to enable the Argentine seed industry to speak about IPR consistently through one voice. The activities under the project provided information tools for use by the seed industry with stakeholders such as farmers and grain handlers in Argentina and officials of the government of Argentina. The information tools were designed to communicate about the investment of the seed industry in developing new technologies which benefit farmers in terms of yield, quality and profit potential of their crops, as well as other stakeholders of the seed industry.

Upon completion of the program's third year in 2011, and with plans underway for a fourth year, ASTA commissioned a third party evaluation to study the impact of the project, provide a market assessment of the present value of the Argentine market for U.S. seed, and determine the viability of the market for future investment through IPR protection for that market.

Although it is difficult to measure real impact of behavioral change after only three years, there is no doubt the program has been successful in meeting short-term goals. First, the Argentine seed industry is working through the Argentine Seed Association (ASA) to speak from one consistent voice. ASA has gained insight into their stakeholders, and as a result, has built better relationships with them. Another monumental achievement was the consensus draft seed bill to modernize the legal framework for seed IPR from the current law established in 1973. As a result of this program, ASTA has created a more welcoming business environment for the U.S. seed industry through improved credibility and visibility of a local partner and a positive messaging campaign to explain the very complex concept of seed IPR benefits and the value of the seed industry in the agricultural community.

Sherpa 360, LLC, who conducted the program evaluation in 2012, was contracted to design, implement and report on an electronic survey to glean information from the target audience of efforts under this project, Argentine farmers. The survey would provide benchmarking data, result interpretation about these efforts, and insight into how to best reach this audience. This survey report is a tool to accompany the program evaluation for ASTA and ASA to build upon their achievements and gain monumental success for the seed industry by maintaining momentum through cooperative efforts by ASTA and ASA.

SURVEY AUDIENCE

Sherpa 360, LLC, was contracted to design, translate into Spanish and populate an electronic survey to the contact list of farmers gathered by ASA. Three lists of contacts were provided to Sherpa 360, LLC. Upon reviewing the lists, it was evident that the lists were not specific to the target audience for the survey, Argentine farmers, and many were lacking details of the contacts beyond email addresses. Therefore, it is recommended that ASA establish a contact management system which will allow them to update, sort and target messages as appropriate.

In order to best target the desired audience for this survey, a discriminating first question was built into the survey, “Do you own, operate or work on a farm?” If a survey participant selected “yes,” the survey continued. If the survey participant answered “no,” they received a message thanking them for their time and interest in the survey and an explanation of the focus of the survey and desired audience. At that point, the survey then concluded for them.

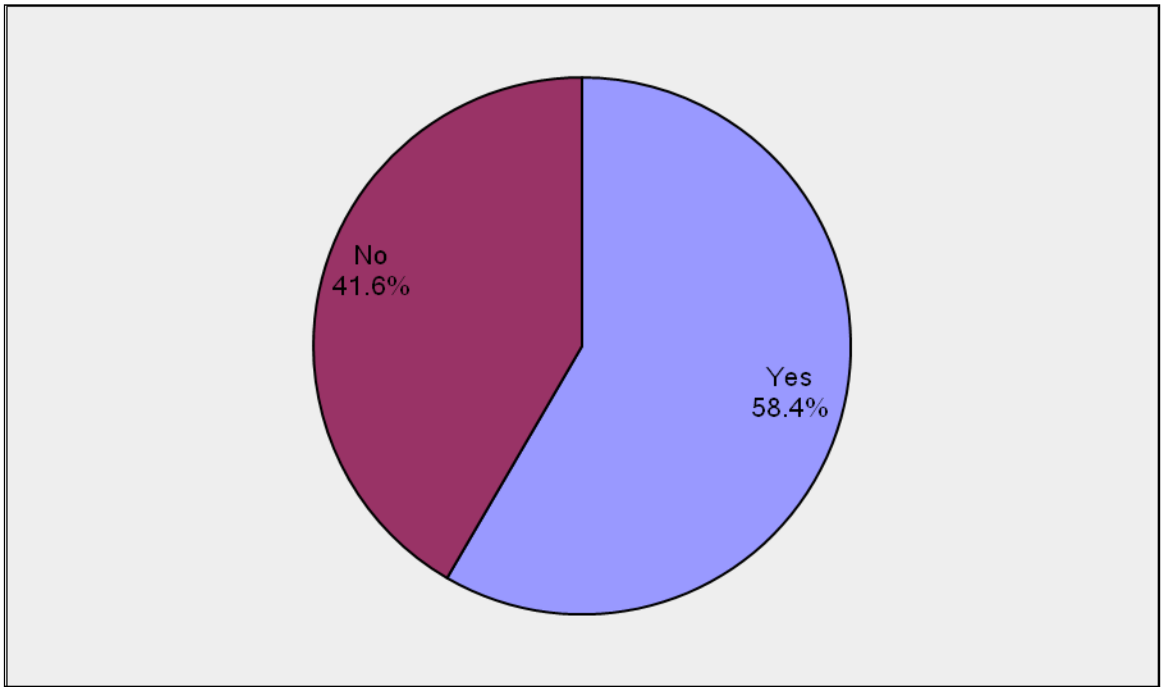
The contacts and subsequent distribution of the survey resulted in the following:

- The survey request was ultimately sent to 4,250 contacts.
    - 7,161 email contacts were sent to Sherpa 360, LLC.
    - 2,820 duplicate email addresses were deleted.
    - The survey was distributed to 4,341 email contacts. Of these, 580 emails resulted in a return (i.e. not a valid address) and 22 persons had opted out to receive such emails from Survey Monkey.
- 245 participated in survey, a 5.76 percent response rate. This response rate is lower than desired; however, with a large contact base, the number of participants is enough to be statistically representative. It should be noted that those who participated are most likely comfortable with online interactions versus paper or phone surveys, other common tools used to solicit input from farmer populations.
- Of those 245 participants, 84.9 percent completed the survey, inclusive of two written response questions at the end of survey (for farmer audience). However, as is expected, some only provided "characters" of text or "none" in order to complete the questions.

SURVEY QUESTIONS, RESULTS & DISCUSSION

Question #1

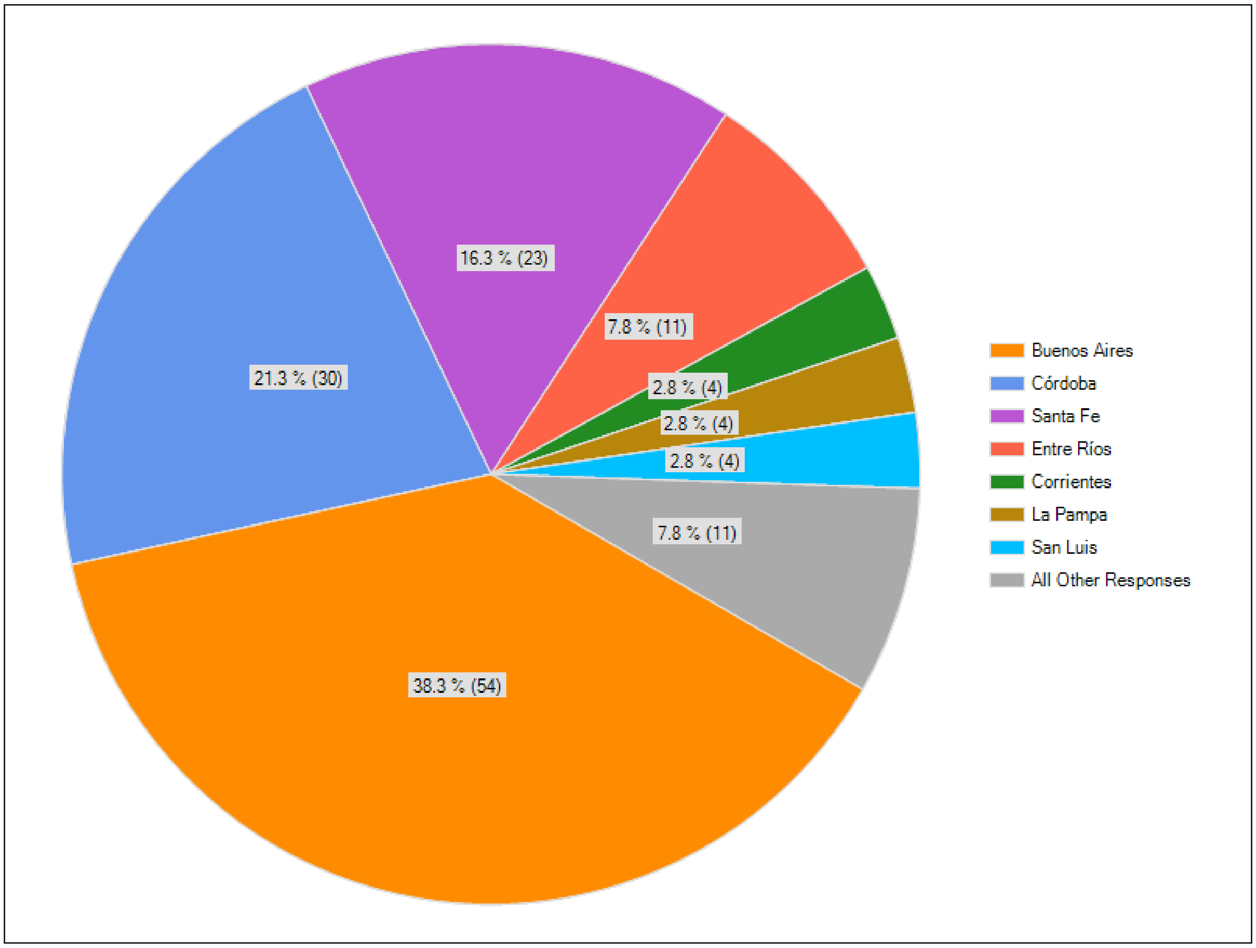
Do you own, operate or work on a farm?		
Answer Options	**Response Percent**	**Response Count**
Yes	58.4%	143
No	41.6%	102
	answered question	**245**
	skipped question	**0**



This question was designed to discriminate against non-farmers responding to the survey. The results indicate that of the 245 participants who responded, only a little over half (143) were farmers, the target audience of the program and the focus of this survey. This question was an effective tool to weed out those from the contact lists who were not the intended recipients of this survey.

Question #2

Please indicate which province you farm in? (If more than one province applies, please check only the providence with the most hectares.)		
Answer Options	**Response Percent**	**Response Count**
Buenos Aires	38.3%	54
Catamarca	0.7%	1
Chaco	1.4%	2
Chubut	0.0%	0
Córdoba	21.3%	30
Corrientes	2.8%	4
Entre Ríos	7.8%	11
Federal District	0.0%	0
Formosa	0.0%	0
Jujuy	0.0%	0
La Pampa	2.8%	4
La Rioja	0.0%	0
Mendoza	0.7%	1
Misiones	0.0%	0
Neuquén	0.7%	1
Río Negro	0.7%	1
Salta	1.4%	2
San Juan	0.0%	0
San Luis	2.8%	4
Santa Cruz	0.7%	1
Santa Fe	16.3%	23
Santiago del Estero	1.4%	2
Tierra del Fuego	0.0%	0
Tucumán	0.0%	0
	answered question	141
	skipped question	104

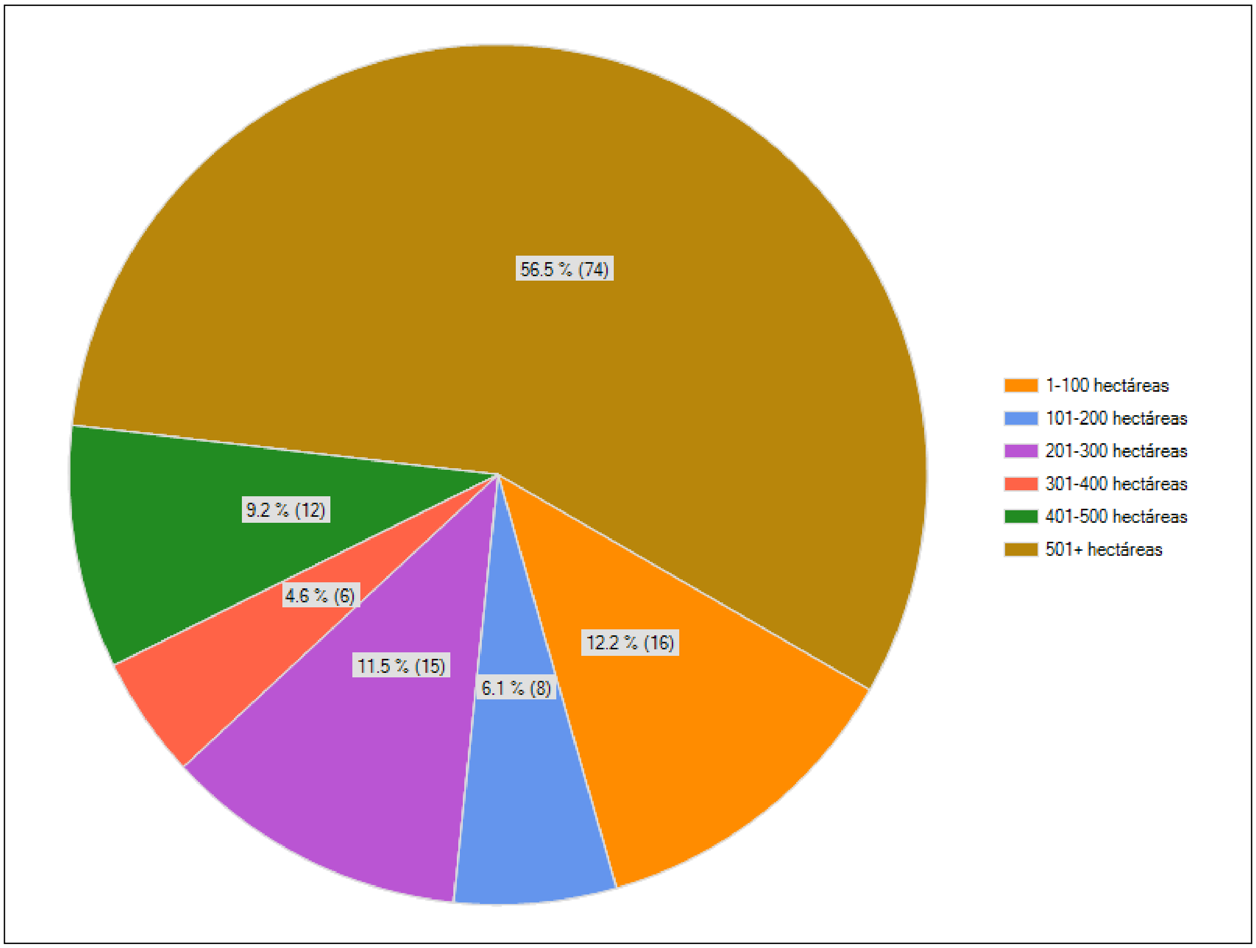


The results indicate the majority of those responding (farmers only from this point forward in the survey) farm in the east central region of Argentina (see map below). It may be beneficial for ASA to explore ways to penetrate their outreach efforts beyond this region or more heavily in particular states as appropriate for crop production areas.


ARGENTINA
Political Map
BOLIVIA
PARAGUAY
BRAZIL
JUJUY
SALTA
FORMOSA
TUCUMAN
CHACO
CATAMARCA
SANTIAGO DEL ESTRO
MISSIONES
CORRIENTES
LA RIOJA
SANTA FE
SAN JUAN
CORDOBA
ENTRE RIOS
SAN LUIS
URUGUAY
MENDOZA
BUENOS AIRES
CHILE
LA PAMPA
BUENOS AIRES
NEUQUEN
RIO NEGRO
SOUTH PACIFIC OCEAN
SOUTH ATLANTIC OCEAN
CHUBUT
SANTA CRUZ
Falkland ISLANDS (U.K)
Strait of Magellan
TIERRA DEL FUEGO
0 20 40 Km
LEGEND
International Boundary
Province Boundary
National Capital
Province Capital

Question #3

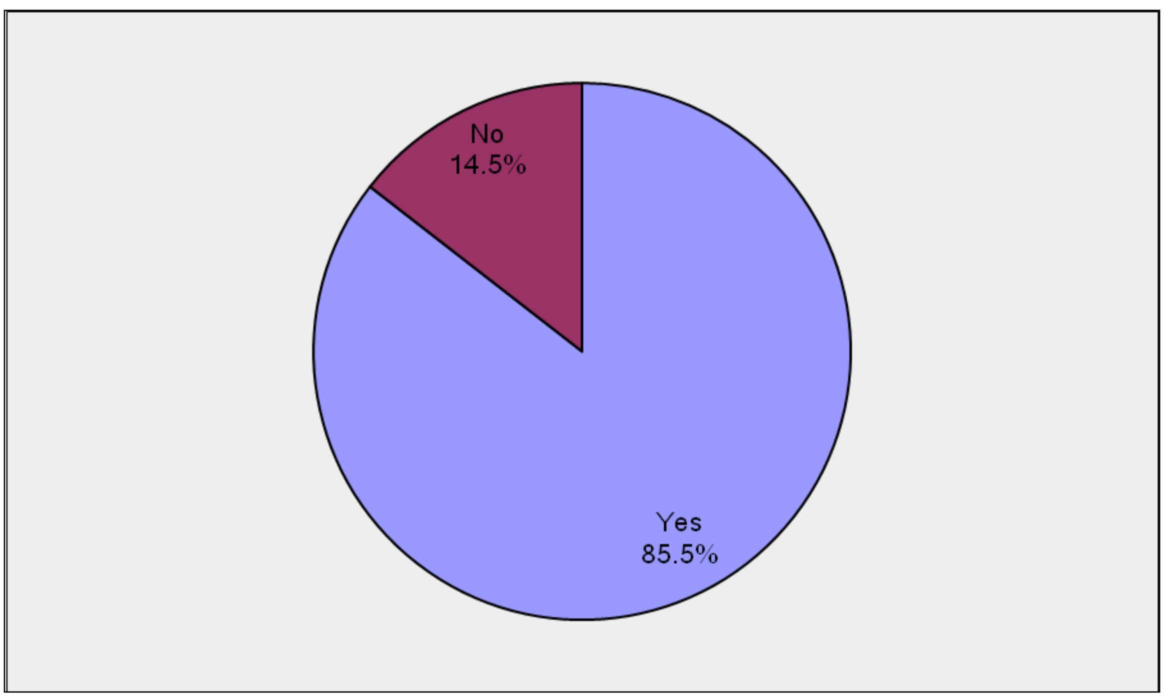
How many hectares of crops, on average, do you plant per year?		
Answer Options	Response Percent	Response Count
1-100 hectares (1-247 acres)	12.2%	16
101-200 hectares (248-494 acres)	6.1%	8
201-300 hectares (495-741 acres)	11.5%	15
301-400 hectares (742-988 acres)	4.6%	6
401-500 hectares (989-1256 acres)	9.2%	12
501+ hectares (1257+ acres)	56.5%	74
	answered question	131
	skipped question	114



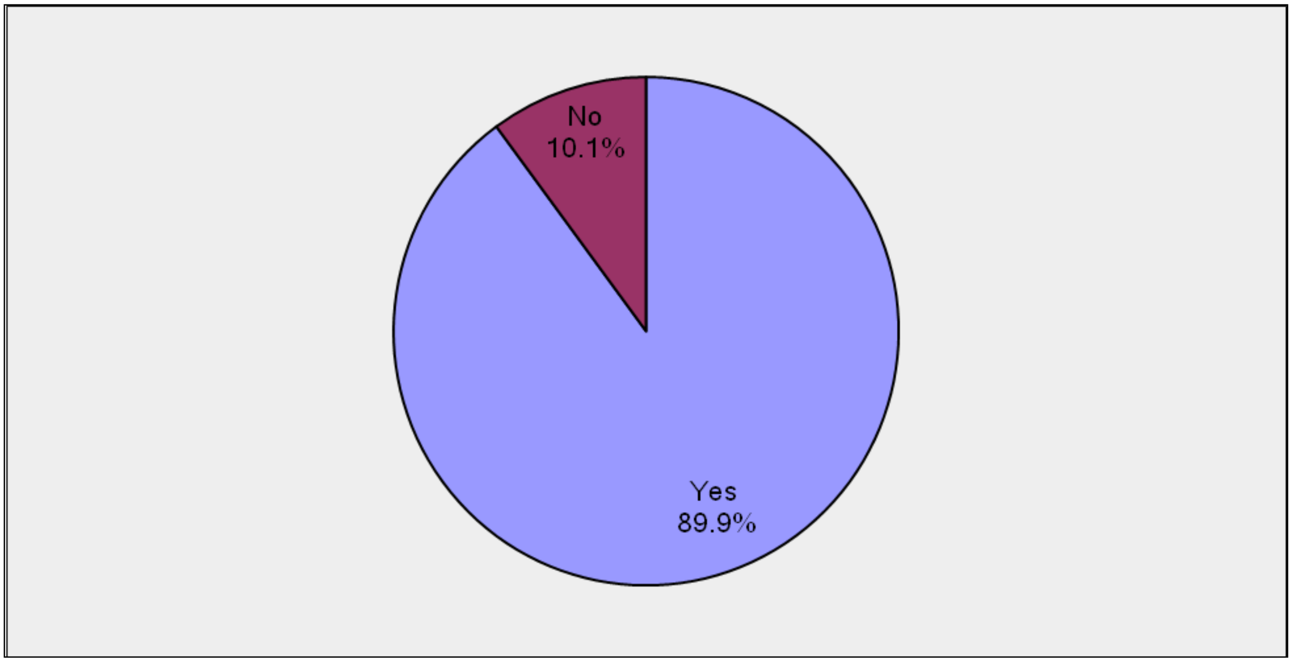
Over half of all survey participants were fairly large scale farmers, approximately 65.8 percent with over 400 hectares. The balance, 34.2 percent, was evenly distributed in the remaining categories, representing small and medium sized farms. According to ASA, outreach efforts in this IPR campaign have focused on large scale farmers. The results of this survey question would indicate that the contacts ASA has established have been with larger scale farmers. Although outreach and messaging to small and medium scale farmers is more challenging for ASA, a strategy should be developed for ASA to engage at some level (perhaps utilizing different methodologies) these important influencers of policy and politics in Argentina.

Questions #4 & #5

Do you purchase seed?		
Answer Options	**Response Percent**	**Response Count**
Yes	85.5%	112
No	14.5%	19
	answered question	**131**
	skipped question	**114**



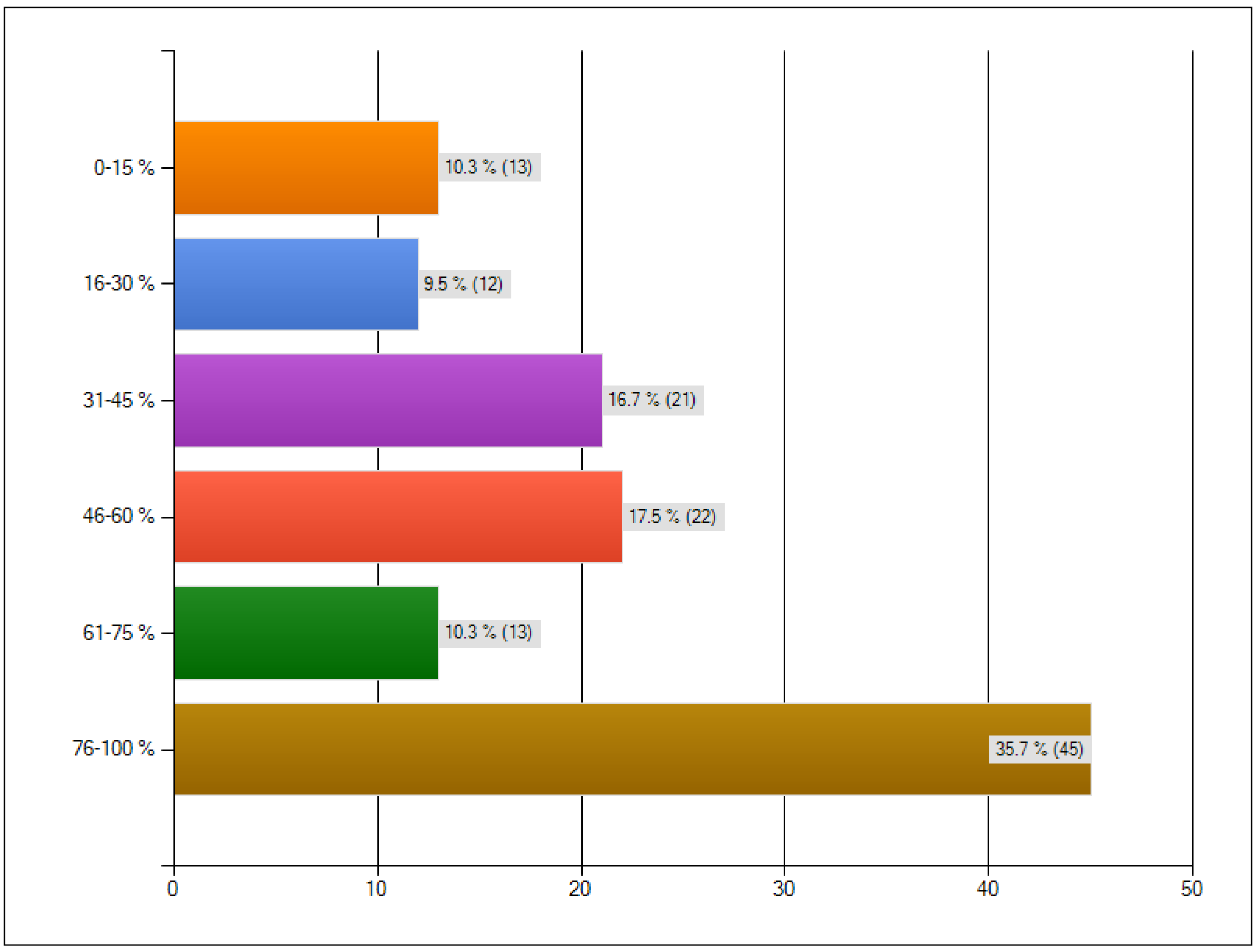
Do you hold or share responsibility in making seed purchases for your farm or a farm you manage?		
Answer Options	Response Percent	Response Count
Yes	89.9%	116
No	10.1%	13
	answered question	129
	skipped question	116



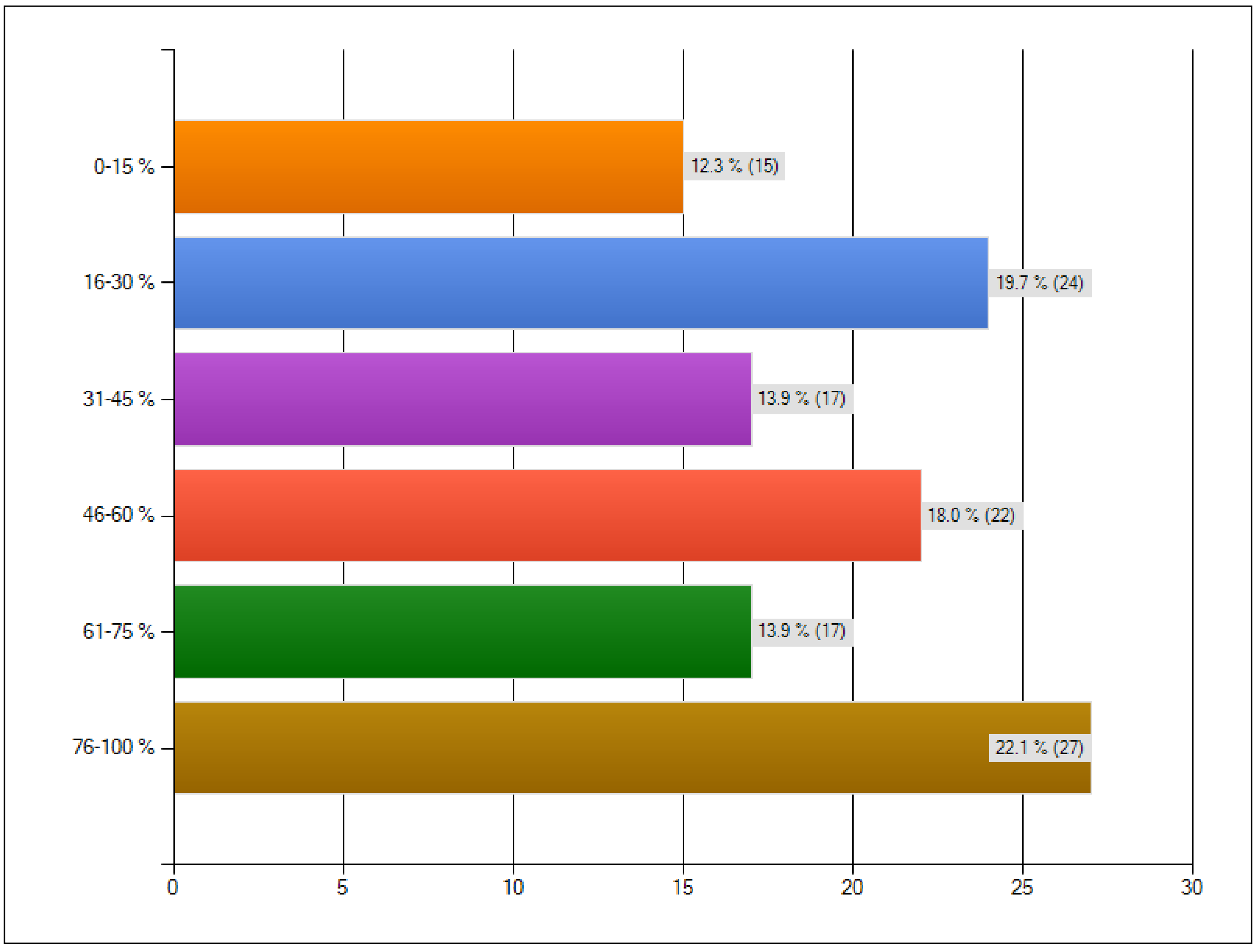
Combined, Questions 4 and 5 provide a picture of the seed purchases. When asked (Question 4) if the survey participant purchased seed, 85.5 percent indicated they purchased seed. In theory, this could be purchases of certified seed and/or brown bag seed (very likely, based on further questions, a combination of both, or mainly certified seed), since the question does not specify. Question 5 provides insight into the person responding to the survey, that this person not only purchases the seed but also plays a role in making the decisions on seed purchases for the farm. It is important that ASA's efforts reach the decision makers for these purchases.

Questions #6 & #7

What percentage of seed was purchased this year?		
Answer Options	Response Percent	Response Count
0-15 %	10.3%	13
16-30 %	9.5%	12
31-45 %	16.7%	21
46-60 %	17.5%	22
61-75 %	10.3%	13
76-100 %	35.7%	45
	answered question	126
	skipped question	119



What percentage of seed (on average) was purchased 5 years ago?		
Answer Options	Response Percent	Response Count
0-15 %	12.3%	15
16-30 %	19.7%	24
31-45 %	13.9%	17
46-60 %	18.0%	22
61-75 %	13.9%	17
76-100 %	22.1%	27
	answered question	122
	skipped question	123



Since no prior benchmarking of the focus group was done before to this survey, Questions 6 and 7 were designed to create a benchmark within the survey and show the evolution of seed purchasing over the last five years. As in prior questions, a purchase of what type of seed (certified or brown bag) was not specified. However, looking at the comparison of the purchases from this year and five years ago, as well as information generated by future questions in the survey, it appears the respondents interpreted this question to be purchases of certified seed, although this is merely an assumption. Future surveying and benchmarking may want to break out these questions more specifically to get a better idea of the market dynamics. However, this is a good first benchmark for future surveys.

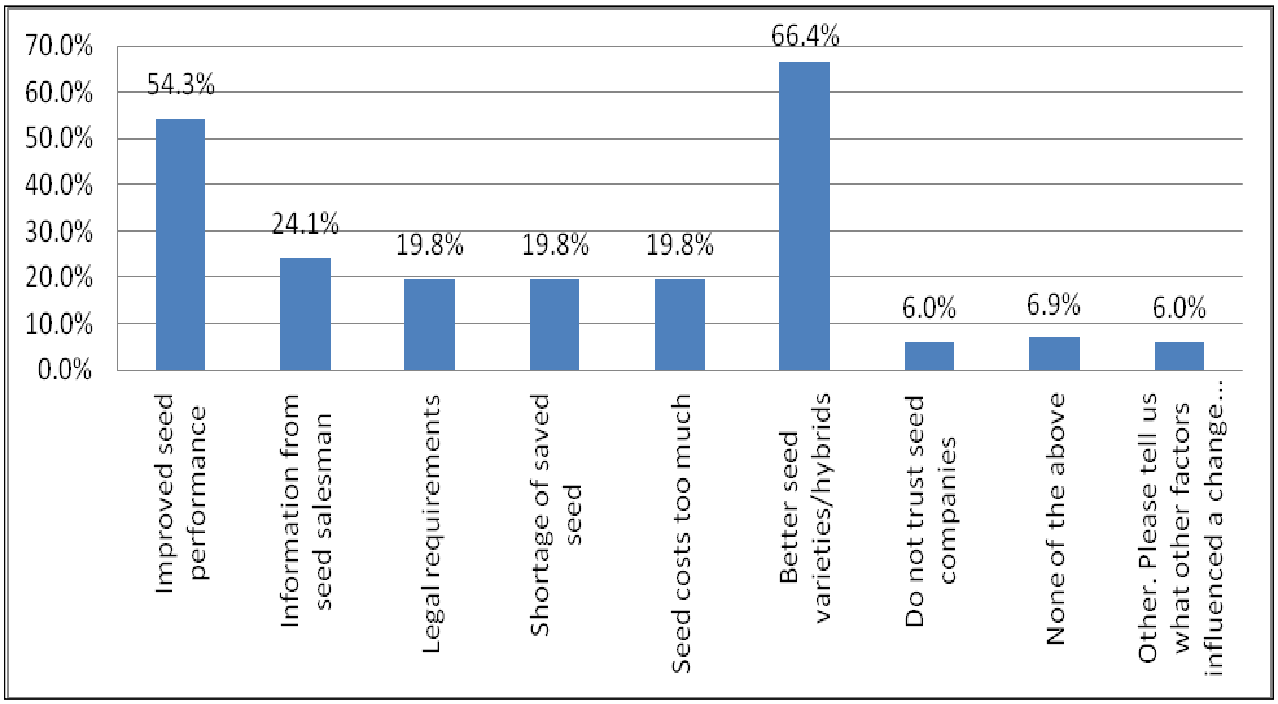
The greatest gain in the five year benchmark has been in those purchasing 76-100 percent of their seed, up 13.6 percent. This movement looks to be mainly pulled from the group purchasing about 15-30 percent five years ago.

Other shifts observed were:

Amount of Purchased Seed	2008 Seed Purchases	2013 Seed Purchases	Percentage Change
0-15 %	12.3 %	10.3 %	-2 %
16-30 %	19.7 %	9.5 %	-10.2 %
31-45 %	13.9 %	16.7 %	+2.8 %
46-60%	18.0 %	17.5 %	-0.5%
61-75 %	13.9 %	10.3 %	-3.6 %
76-100 %	22.1 %	35.7 %	+13.6 %

Question #8

If there was a change in your purchase of seed over the last 5 to 10 years, please indicate the factors in why this changed. (Check all that apply)		
Answer Options	Response Percent	Response Count
Improved seed performance	54.3%	63
Information from seed salesman	24.1%	28
Legal requirements	19.8%	23
Shortage of saved seed	19.8%	23
Seed costs too much	19.8%	23
Better seed varieties/hybrids	66.4%	77
Do not trust seed companies	6.0%	7
None of the above	6.9%	8
Other. Please tell us what other factors influenced a change in your purchase of seed.	6.0%	7
	answered question	116
	skipped question	129



The two most significant drivers behind a shift in seed purchasing were improved seed performance and better seed varieties and hybrids. Of the 116 respondents, 63 chose improved seed performance and 77 selected better seed varieties or hybrids.

Averaging about 20 percent, and almost a “second” tier of motivations, included legal requirements, shortage of saved seed and the cost of seed being too high, as well as information from seed salesman. Receiving the lowest response, in addition to the “none of the above” and “other,” was a lack of trust of the seed companies.

“Other” factors indicated:

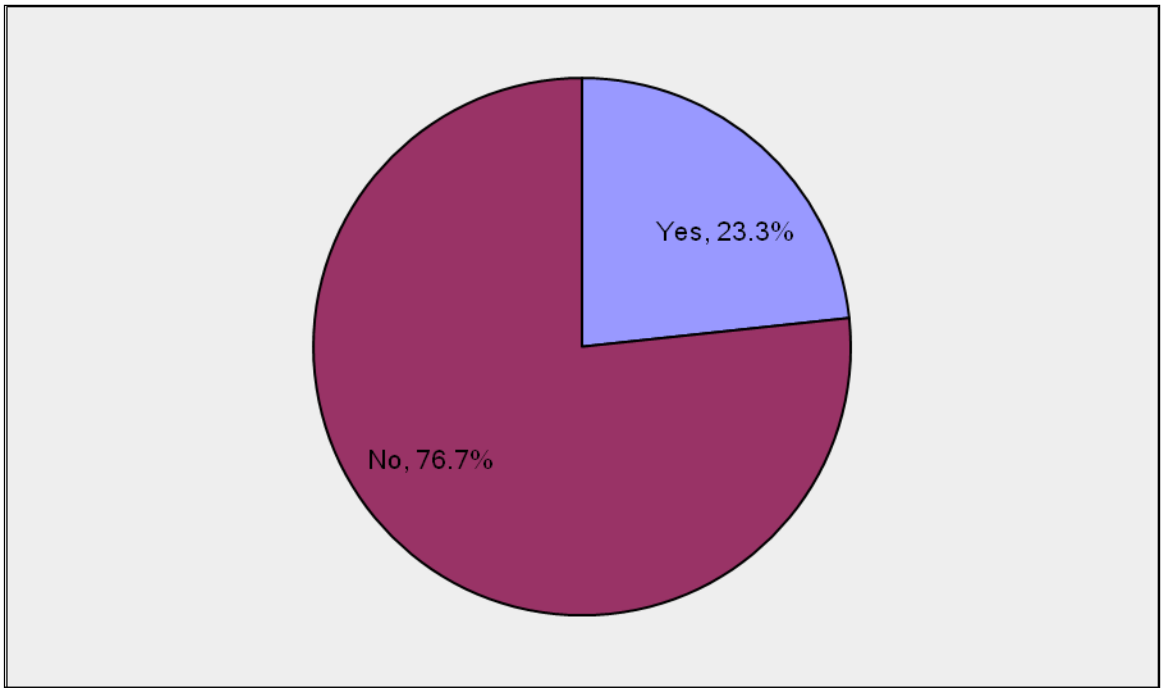
- Production potential versus farm condition;
- Seed suppliers and their structure;
- Better information on biotechnology and agricultural practices;
- Delays in delivery of hybrids and changes in prices and conditions;
- Increase of availability of seed, especially for specific regional zones; and
- Seed-borne diseases.

The responses demonstrate an understanding of the link between purchased seed (assumed in this case to be certified seed based on the data above), improved performance and a better outcome on their farm. Therefore, messages of “investment together into the future,” “partnership between growers and seedsmen,” and improvement for “one value chain” could be successful ways to improve the bridge of dialogue between the seed industry and the farmer community and bolster understanding about how IPR plays a role in these messages. Additionally, with only 24.1 percent indicating their seed purchase was influenced by a seed salesman, there may be a larger role to play in the interface of the first point of sale. For example, in the United States, Sherpa 360, LLC, conducted a similar survey with wheat growers in Ohio, and when asked “How do you currently receive information about wheat production and marketing?” the overwhelming response at 78 percent was seed dealers. Although comparing the systems in the United States and Argentina is like comparing apples and oranges, it could be argued that you are still working with tree fruit and some lessons could be easily transferred to build a similar network of support offered by the seed industry, which could translate into understanding and respect of IPR and the seed industry’s role in supporting the farmers. Consequently, this interaction at the first point of sale would improve two-way communication, and help seed salesman provide feedback into the market development process with information on regional needs as indicated by the “other” responses.

Interesting, the minor role legal requirements play in the decision making process. Providing little incentive (if there is no enforcement), the greatest gains to respect IPR will most likely be through marketing channels and good communication between the seed industry representatives and the grower to realize the mutual benefits.

Question #9

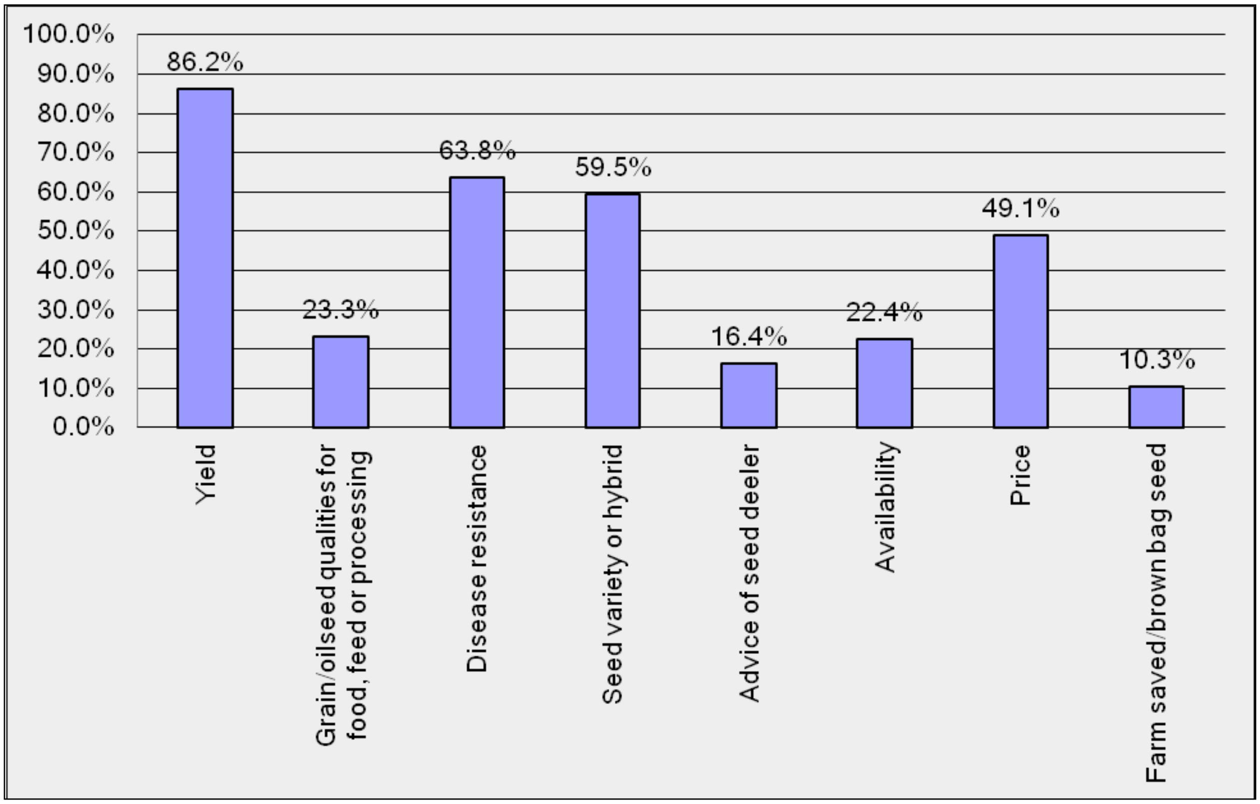
Based on your experience with purchased seed, would you recommend purchasing seed to another farmer?		
Answer Options	Response Percent	Response Count
Yes	23.3%	27
No	76.7%	89
	answered question	116
	skipped question	129



Every survey has a question built into it to say, "would you recommend this person, this product or this service?" For this survey, participants were asked if they would recommend purchased seed to another farmer. Again, the assumption can also be made here from the entirety of the survey that "purchased" seed is certified and/or both certified and brown bag seed, it is not specific. However, the message by this response is that there is dramatic room for improvement for the farmer to see enough benefit that they will communicate the value beyond his own operation. Although farming is competitive, and farmers are reluctant to share certain information (especially in local circles), farmer leaders (of which we would expect to be a majority portion of lists from the farming associations included in these contact lists) generally are vocal and open about how they have improved their operation, especially when they have proof (better soil conservation, better disease or pest management, etc.). In Argentina, the culture of sharing among farmers may not be as strong, but as ASA continues to work and build their ongoing relationships with the farmer organizations, there may be a role to play for the seed industry to play (as is seen in the United States) in the development of these organizations and the farmer leaders. On the other hand, there is also a role for the first point salesman to understand why a product would not be recommended by the farmer and looking at the product or service being provided.

Question #10

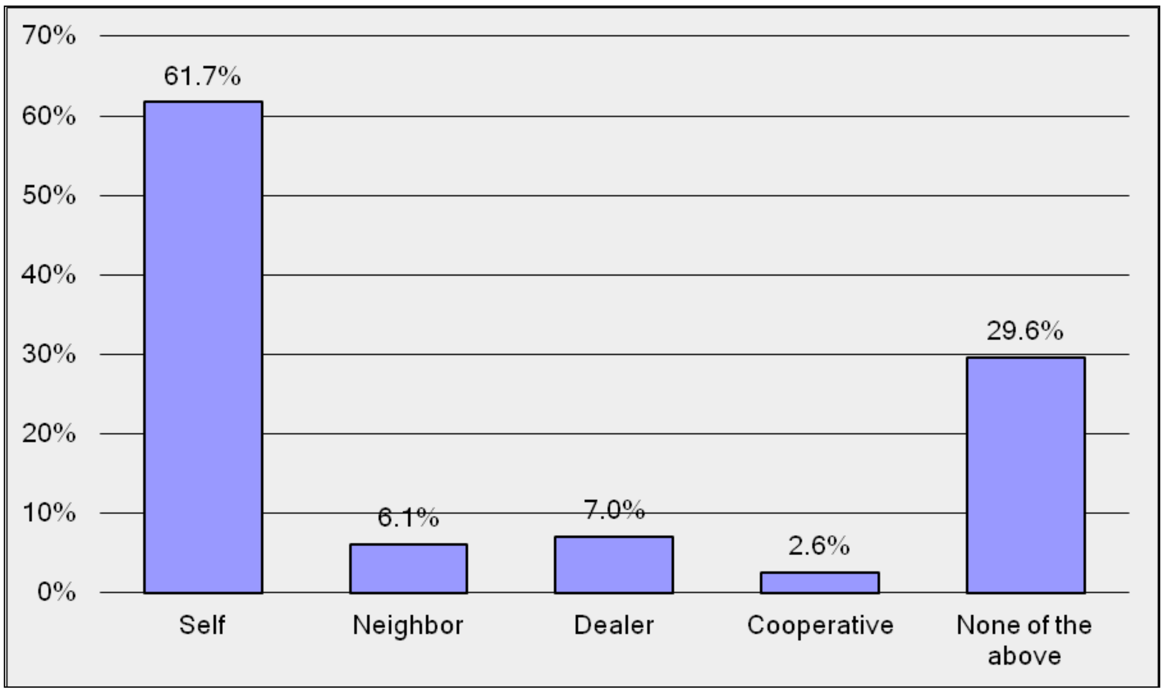
What factors go into your decision making process for seed purchases? (Check all that apply.)		
Answer Options	**Response Percent**	**Response Count**
Yield	86.2%	100
Grain/oilseed qualities for food, feed or processing	23.3%	27
Disease resistance	63.8%	74
Seed variety or hybrid	59.5%	69
Advice of seed deeler	16.4%	19
Availability	22.4%	26
Price	49.1%	57
Farm saved/brown bag seed	10.3%	12
	answered question	**116**
	skipped question	**129**



When asked about what factors go into the decision when making a seed purchase, the expected response of "yield" held true and was predominate as is the case with farmers around the world. Beyond that, the ability for a seed to perform as is needed by the farmer (the actual variety or hybrid) as well as the protection provided (disease resistance) play important roles. From survey results, however, this is a delicate balance with price. As is the case on any farm, the farmer will look at the inputs (of which seed is the foundation) needed to deal with the challenges of weather, disease, pest and market, and balance that with profit generated from the output off a hectare or acre of land. The formula of input and output is so sensitive to each market, as well as conditions beyond a farmers control like weather. With the margin of profit potentially very slim, the risks are high in getting the formula wrong. In a similar survey of U.S. corn farmers, although highly sophisticated in evaluating inputs and marketing strategies for their crop, many still desired a better grasp of how to fine tune and improve this formula.

Question #11

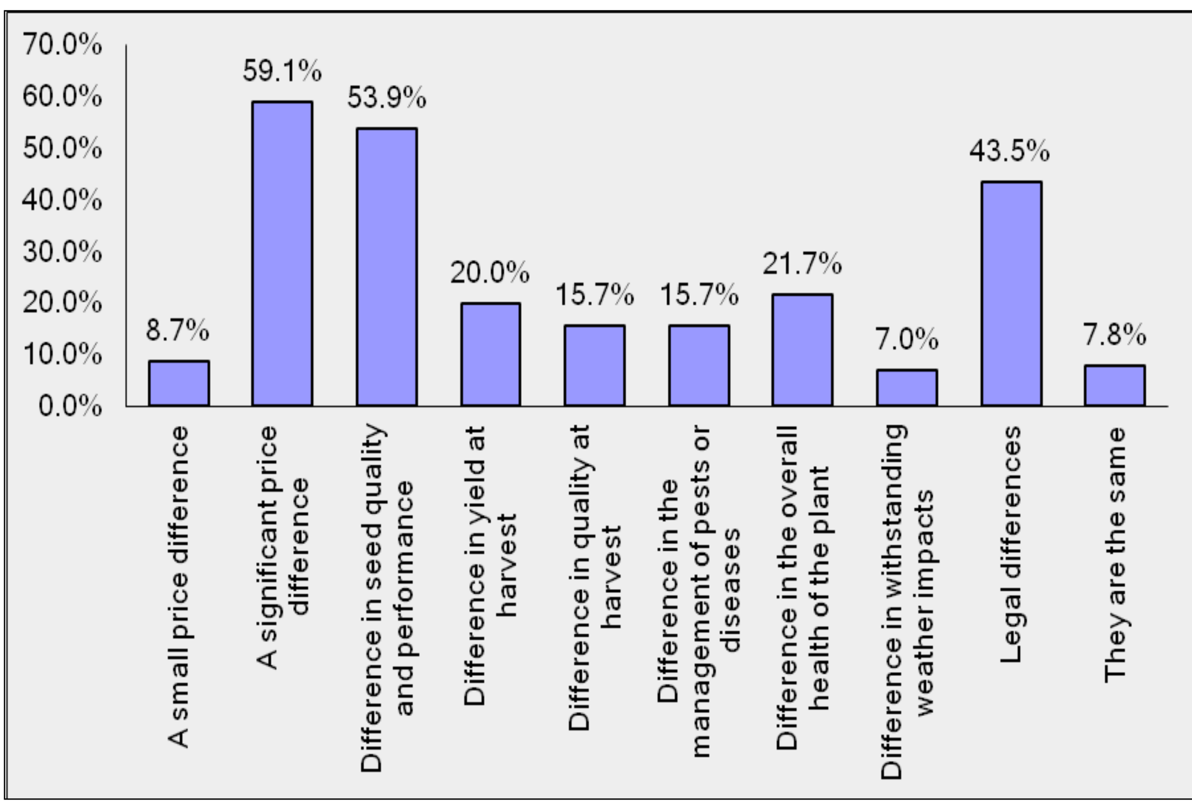
If you used brown bag seed, where did you obtain this? (Check all that apply)		
Answer Options	Response Percent	Response Count
Self	61.7%	71
Neighbor	6.1%	7
Dealer	7.0%	8
Cooperative	2.6%	3
None of the above	29.6%	34
	answered question	115
	skipped question	130



The survey asked farmers if they did use brown bag seed, where they acquired this seed. It is important to have an understanding if the use of the seed is saved on farm and/or is being sold through an illicit marketing channel. The issues for the return on intellectual property of seed are different depending on how the seed is acquired and the legal frameworks in each market. Since it is reasonable that farmers may use more than one method to acquire brown bag seed, the survey participants were asked to mark all that applied for them. A majority indicated they obtain brown bag seed through on-farm production. Although other logical choices were offered, the next prevailing answer was “none of the above.” Perhaps, the offering of set answers was not appropriate for the Argentine farmer audience; however, it would be critical to further investigate other channels to obtain brown bag seed. One could speculate, but more important to gain further insight into these marketing channels so that strategies can be developed to best address how intellectual property value is captured and legal frameworks enforced.

Question #12

Please indicate any difference you feel there is between saved/brown bag seed and certified seed. (Check all that apply)		
Answer Options	Response Percent	Response Count
A small price difference	8.7%	10
A significant price difference	59.1%	68
Difference in seed quality and performance	53.9%	62
Difference in yield at harvest	20.0%	23
Difference in quality at harvest	15.7%	18
Difference in the management of pests or diseases	15.7%	18
Difference in the overall health of the plant	21.7%	25
Difference in withstanding weather impacts	7.0%	8
Legal differences	43.5%	50
They are the same	7.8%	9
	answered question	115
	skipped question	130



This question was designed to explore the knowledge and perceptions of the farmers in what the difference is between saved/brown bag and certified seed. A triad developed from the results. First, the farmers feel that there is a significant difference in the cost, but almost equally recognize a difference in the seed quality and performance. Interesting to note, that 43.5 percent showed awareness of the legal differences, a noteworthy benchmark for future surveys to show incremental improvement of IPR understanding. Difference in the value to production using certified seed was less apparent and dispersed among a variety of aspects of production, quality, yield, plant health and plant vigor.

Questions #13 & #14

Overall, how satisfied are you with the quality and performance of saved seed or brown bag?							
Answer Options	Extremely	Very	Somewhat	Slightly	Not at All	Rating Average	Response Count
	7	61	26	9	12	3.37	115
						answered question	115
						skipped question	130

Overall, how satisfied are you with the quality and performance of certified seed?							
Answer Options	Extremely	Very	Somewhat	Slightly	Not at All	Rating Average	Response Count
	16	88	8	2	1	4.01	115
						answered question	115
						skipped question	130

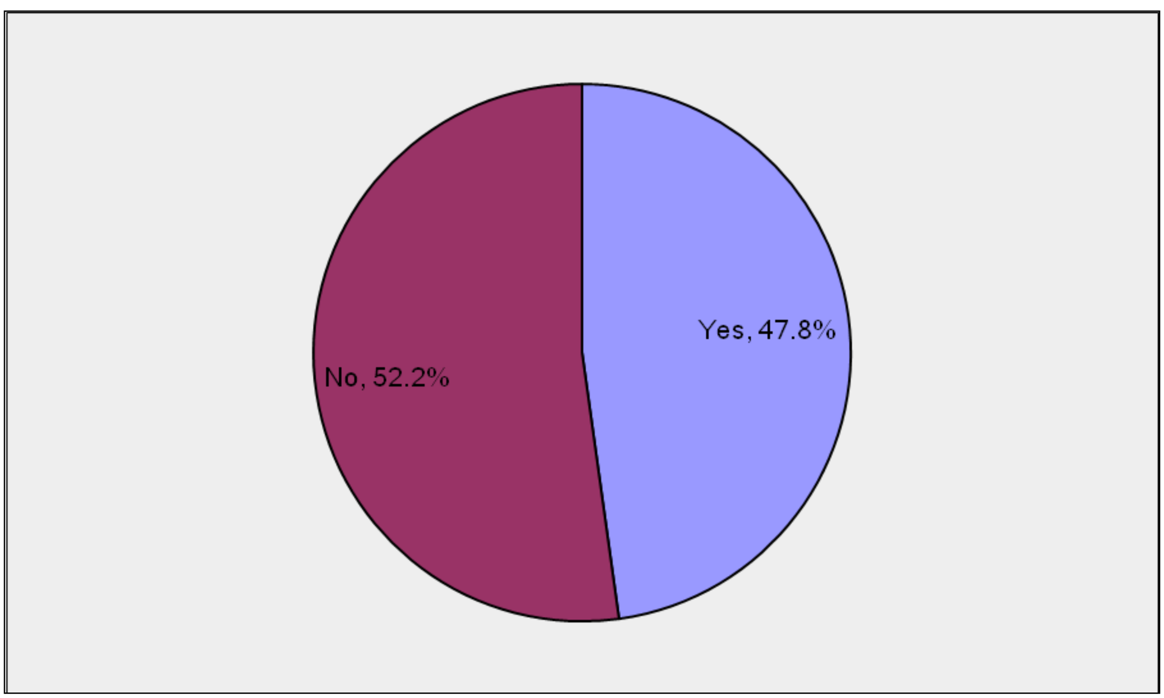
Questions 13 and 14 gauge and provide comparison of overall satisfaction of saved/brown bag seed and certified seed. Each response was waited depending on satisfaction. Below is a comparison:

Type of Seed	Extremely	Very	Somewhat	Slightly	Not at All
Saved/Brown Bag	6.1 %	53.0 %	22.6 %	7.8 %	10.4 %
Certified	13.9 %	76.5 %	7.0 %	1.7 %	0.9 %

Of the 115 survey participants who answered this question, we find that most of them have had a very to extremely satisfying experience with certified seed versus a somewhat to very satisfying experience with saved or brown bag seed. It should be noted that satisfaction with a product bares the weight of price as well. What is also telling is the percentage of those who were not satisfied. In saved or brown bag seed, approximately 18.2 percent noted less than average satisfaction, where certified seed returned only 2.6 percent less than average satisfaction. Workings with farmers individually to help them personally realize their satisfaction with certified seed may be an approach worth exploring. Field plots demonstrating the benefits of certified seed over brown bag or saved seed may be an additional approach. However, the general above average satisfaction with saved/brown bag seed indicates a quality of seed acceptable to farmers for the price paid (or free).

Question #15

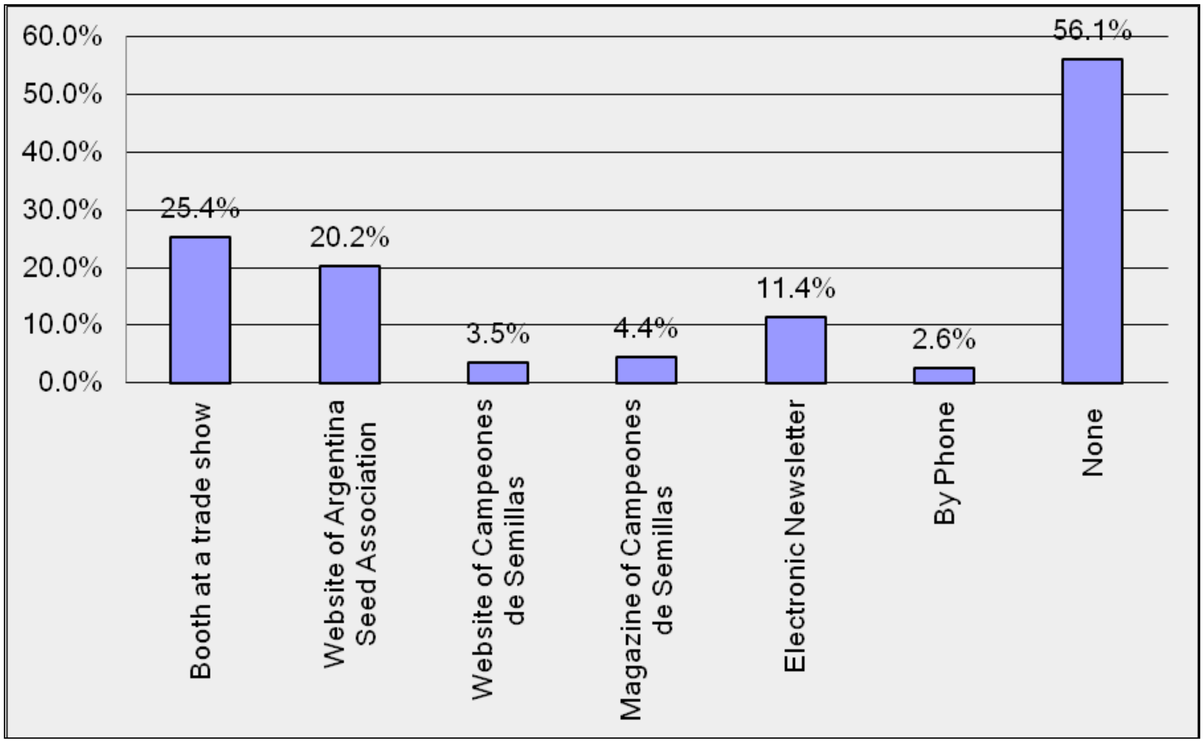
Are you familiar with the Argentina Seed Association?		
Answer Options	Response Percent	Response Count
Yes	47.8%	55
No	52.2%	60
	answered question	115
	skipped question	130



ASA reportedly had made many contacts with farmers through this IPR outreach campaign utilizing their websites (ASA specifically and the one dedicated to the campaign), newsletters, magazine and farmer expos. These contacts lists were to be the basis of the focus group to receive this survey. However, as indicated above, the contacts were not limited to the focus group. In addition, this question exploring basic knowledge of ASA by the survey participants who are actual farmers indicates that less than half are “familiar” with the organization. Perhaps the farmer’s contact information was gathered at an expo, and they were unaware of whom they were meeting with, or perhaps the focus group does not make a connection of the materials they receive and ASA. However, more work need to be done in the identity of ASA as a resource for the farmer community, a goal of this outreach campaign.

Question #16

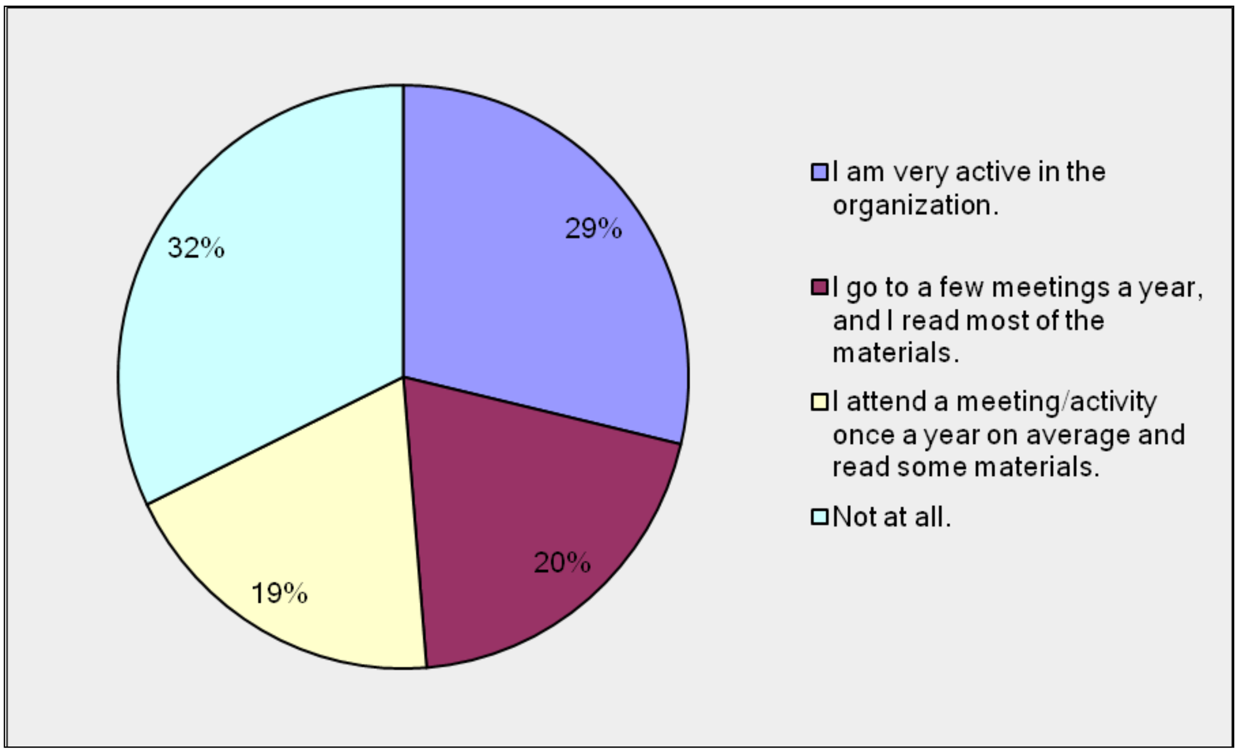
Have you received or sought out information from the Argentina Seed Association in the following ways? (Check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Booth at a trade show	25.4%	29
Website of Argentina Seed Association	20.2%	23
Website of Campeones de Semillas	3.5%	4
Magazine of Campeones de Semillas	4.4%	5
Electronic Newsletter	11.4%	13
By Phone	2.6%	3
None	56.1%	64
	answered question	114
	skipped question	131



Reinforcing the findings in the previous question about the lack of familiarity about ASA, over half of the respondants indicated they had neither received or sought out information from ASA. Exploring further those who indicated a level of interaction, the main vehicles were through trade shows and the ASA website. Significantly lacking in success with the target audience were two tools of the IPR outreach campaign, the website and the magazine of Capeones de Semillas. Slightly better than these two tools, the electronic newsletter only had 13 out of 114 people indicate use of this tool. It is clear that although the tools maybe be beneficial, better contact management and targeted marketing to the focus group of the IPR outreach program needs to take place. Additionally, ASA needs to follow up with these contacts through surveys and general contacts to make sure the messages are getting to the target audiences as well as resonating with them.

Question #17

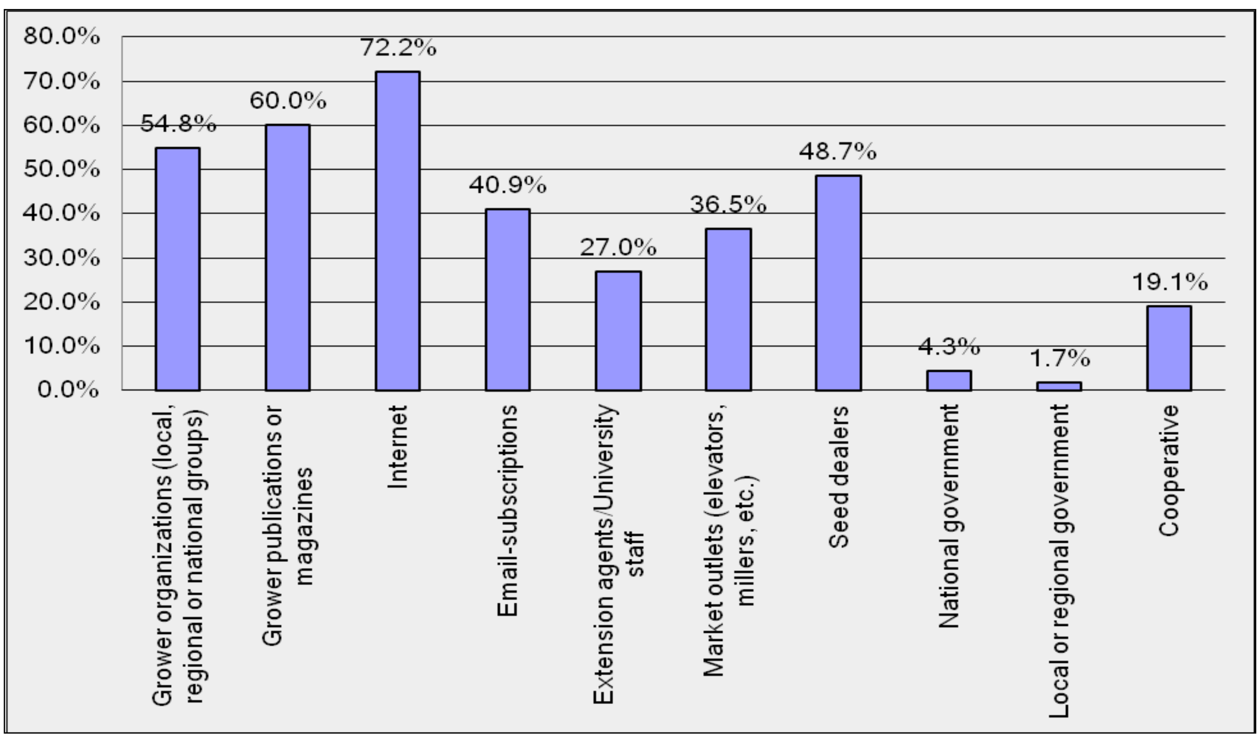
Are you a member of a national farmer organization?		
Answer Options	Response Percent	Response Count
I am very active in the organization.	28.7%	33
I go to a few meetings a year, and I read most of the materials.	20.0%	23
I attend a meeting/activity once a year on average and read some materials.	19.1%	22
Not at all.	32.2%	37
answered question		115
skipped question		130



The survey participants tended to be either very active in a national farmer organization or not at all (with 29 percent and 32 percent, respectively). Approximately 40 percent interact with the organizations through an annual meeting or organized event and some of the materials. ASA has utilized relationships with farmer organizations to provide outreach and information to farmers. Since there seems to be a missed opportunity at the national organizations, ASA may want to look at regional, state or local organizations of farmers and developing relationships at these levels. Additionally, there may be organizational development assistance ASA could provide to these national farmer organizations to further engage their members, potential members and leadership.

Question #18

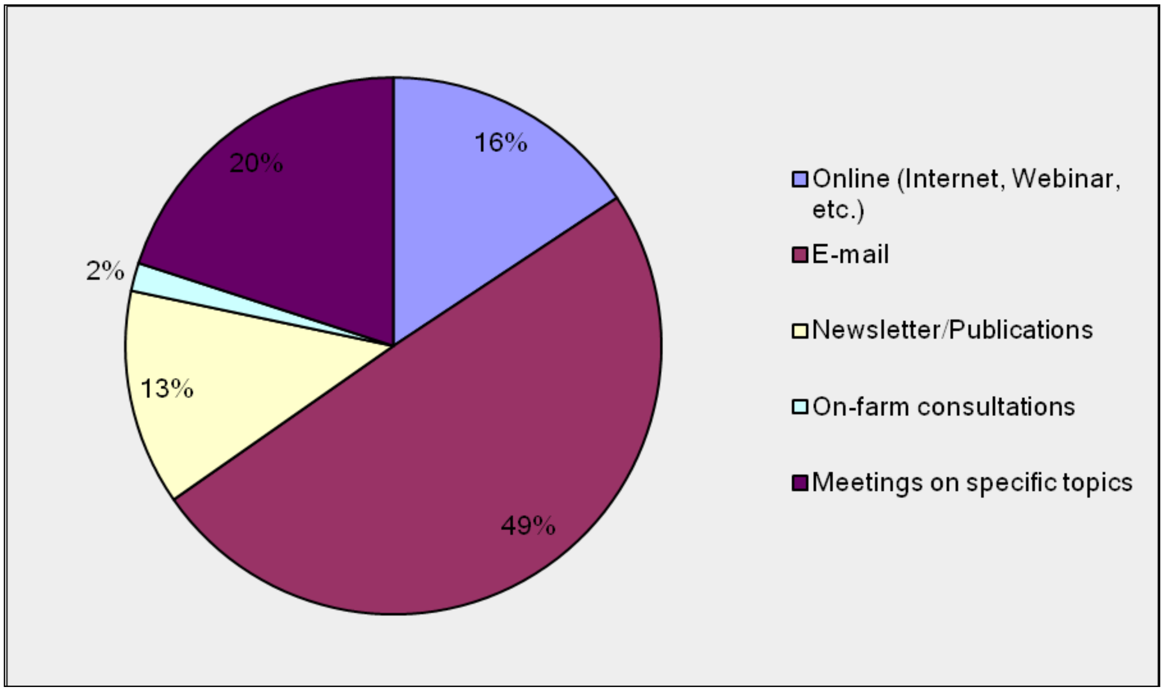
How do you currently receive information about production and marketing on your farm? (Check all that apply)		
Answer Options	Response Percent	Response Count
Grower organizations (local, regional or national	54.8%	63
Grower publications or magazines	60.0%	69
Internet	72.2%	83
Email-subscriptions	40.9%	47
Extension agents/University staff	27.0%	31
Market outlets (elevators, millers, etc.)	36.5%	42
Seed dealers	48.7%	56
National government	4.3%	5
Local or regional government	1.7%	2
Cooperative	19.1%	22
	answered question	115
	skipped question	130



Providing information to a target audience in a way that is desired and accessible by that audience is critical to good outreach and communication. This question provides insight into the ways that survey participants seek out information. That being said, some of the results could be skewed in that those who responded to the electronic survey demonstrate a level of ease and familiarity with the Internet and the electronic world of communication. As the results show, the Internet is an important tool for these farmers to get information. Close behind were magazines and farmer organizations. Based on data from previous questions, these farmer organizations may very well be regional. ASA may find value in exploring the structures of the different organizations available to farmers at the regional level. Electronic media and personal interaction with seed dealers also play a role in information gathering. Ultimately, these results help benchmark improved communication outlets as well as provide insight into how to best communicate to the focus group of Argentine farmers.

Question #19

How do you prefer to receive information that may benefit your farm?		
Answer Options	**Response Percent**	**Response Count**
Online (Internet, Webinar, etc.)	15.7%	18
E-mail	49.6%	57
Newsletter/Publications	13.0%	15
On-farm consultations	1.7%	2
Meetings on specific topics	20.0%	23
	answered question	**115**
	skipped question	**130**



This question also provides insight into the ways that survey participants seek out information. That being said, some of the results could be skewed in that those who responded to the electronic survey demonstrate a level of ease and familiarity with the Internet and the electronic world of communication. The preference (almost 50 percent) is for E-mail to the farmer. Interestingly enough, there is about equal interest between online resources and meetings on specific topics. Exploration of webinars, You Tube videos and other interactive topical information sources sent out to farmers may be worth some effort.

Question #20

Please share your thoughts on what goes into the price set for a bag of certified seed.	
Answer Options	Response Count
	111
answered question	111
skipped question	134

Responses	Response Count
Quality (classification, germination, purity) of seed/technology which is certified	40
Price is too high for value (Saved or brown bag cost plus royalties, marketing, etc.)	14
More legal requirements, royalty collections, legally bound to buy	12
Research and development, technology	8
Cleaning, production, storage	7
Don't know, do not understand, not easy to know	7
Price (supply and demand) of grain, grain quality, seed availability, health, replication, varieties	7
Saved seed is for a determined use on farm and offers security (easy to use)	7
Higher price for guarantee and accountability	6
Quality and yield of harvest	4
Generally not adequate delivery/logistics/service (old varieties available)	3
VAT tax makes it difficult to recover the cost	3

Of the 111 that answered the open ended question, only 92 provided specific input, and of those, some provided more than one answer. The above chart is a tally of the general responses provided by the farmers. From these responses, there is certainly an understanding that certified seed is supposed to deliver a better quality product (by virtue of the certification process) and incorporation of new technologies. However, from the tone of the responses, there is the sense that farmers feel like they should get better support (service, logistics, availability of the seed they want) for the added cost. Also, saved seed, in particular, offers a sense of security to the producer, a way to control cost and achieve a satisfactory level of quality. They have an impression that in addition to royalties for IPR, they are also paying for commercials and marketing for which they do not see direct value.

Question #22

Please provide a recommendation to the seed industry to improve understanding and communication with farmers about new technology in seed and the benefits of certified seed purchases.	
Answer Options	Response Count
	111
answered question	111
skipped question	134

Responses	**Response Count**
Comparative tests/demonstrations showing cost/benefit and detriment to total value	26
Technical assistance, pre-planting meetings, work with trusted advisors and associations (regional)	26
Clearly explain benefits, while being transparent. More frequent	18
Meet with farmer "customer" (two way communication)	15
Better (fair) price for better (stable quality) product	9
Improve collection of royalties for IPR, provide incentive, address tax issue	7
Marketing and demonstration of reinvestment for new varieties/hybrids	7
Educate stores not to encourage sales of brown bag seed	4
Certified seed in different bags and bulk seed options	2

Of the 111 that answered the open ended question, only 89 provided specific input, and of those, some provided more than one answer. The above chart is a tally of the general responses provided by the farmers. From their responses, the Argentine seed industry should consider invigorating a structure of two way communication with their farmer customers, incorporating studies to demonstrate the value of certified seed for its cost as well as the detriment of not using this seed. Technical forums prior to planting (and decisions on seed purchases), utilizing regional venues, test plot information and technical experts would be well received based on the feedback from the farmers. If the seed industry is already undertaking some of these initiatives, activity should be increased for more visibility and ongoing, transparent and trusted communication.

RECOMMENDATIONS FOR FUTURE PROGRAMS

- ASA needs to establish a contact management system which will allow them to update, sort and target messages as appropriate.
- One oversight in developing the survey questions was to more specifically delineate what is meant by a seed purchase. Future surveys should address this. Unfortunately, the impact of the question wording was not realized until the survey had been completed.
- ASA may want to explore ways to penetrate their outreach efforts beyond the region where it has sustained outreach, with a heavier focus in regions appropriately designated crop production areas.
- Although outreach and messaging to small and medium scale farmers is more challenging for ASA, a strategy should be developed for ASA to engage at some level (perhaps utilizing different methodologies) these important influencers of policy and politics in Argentina.
- There appears to be an understanding of the link between purchased seed, improved performance and a better outcome on their farm. Therefore, messages of “investment together into the future,” “partnership between growers and seedsmen,” and improvement for “one value chain” could be successful ways to improve the bridge of dialogue between the seed industry and the farmer community and bolster understanding about how IPR plays a role in these messages.
- There is room for seed salesman to have more influence directly on the farmers decisions on seed purchases. Consequently, this interaction at the first point of sale would improve two-way communication, and help seed salesman provide feedback into the market development process with information on regional needs.
- Legal requirements played a minor role in the decision making process. Providing little incentive (if there is no enforcement), the greatest gains to respect

IPR will most likely be through marketing channels and good communication between the seed industry representatives and the grower to realize the mutual benefits.

- The benchmark for product recommendation had significant room for improvement. The farmer needs to see enough benefit that they will communicate the value beyond his own operation.

- In Argentina, the culture of sharing among farmers may not be as strong as in the U.S., but as ASA continues to work and build their ongoing relationships with the farmer organizations, there may be a role to play for the seed industry to play (as is seen in the United States) in the development of these organizations and the farmer leaders.

- A majority indicated they obtain brown bag seed through on-farm production. Although other logical choices were offered, the next prevailing answer was "none of the above." It would be critical to further investigate other channels to obtain brown bag seed so that strategies can be developed to best address how intellectual property value is captured and legal frameworks enforced.

- Workings with farmers individually to help them personally realize their satisfaction with certified seed may be an approach worth exploring. Field plots demonstrating the benefits of certified seed over brown bag or saved seed may be an additional approach.

- Less than half of those surveyed were "familiar" with ASA. More work needs to be done to solidify ASA's identity as a resource for the farmer community, a goal of this outreach campaign.

- Although the tools for the IPR outreach campaign maybe be beneficial, better contact management and targeted marketing to the focus group of the IPR outreach program needs to take place. Additionally, ASA needs to follow up with these contacts through surveys and general contacts to make sure the messages are getting to the target audiences as well as resonating with them.

- Although national organizations do play a role in these outreach efforts, ASA may want to look at regional, state or local organizations of farmers and developing relationships at these levels.

- There may be organizational development assistance ASA could provide to these national farmer organizations to further engage their members, potential members and leadership.

- Because of the equal interest in online resources and topical meetings, ASA and its members may want to explore use of webinars, You Tube videos and other interactive topical information sources sent out to farmers.
- From the open ended questions, Argentine seed companies may want to look at how to improve their approach to marketing channels and the servicing they provide.
- From the open ended questions, Argentine seed companies should consider invigorating a structure of two way communication with their farmer customers, incorporating studies to demonstrate the value of certified seed for its cost as well as the detriment of not using this seed. Technical forums prior to planting (and decisions on seed purchases), utilizing regional venues, test plot information and technical experts would be well received based on the feedback from the farmers. If the seed industry is already undertaking some of these initiatives, activity should be increased for more visibility and ongoing, transparent and trusted communication.