

Improving the TOTAL Survey on Land Ownership

Conducted by the USDA National Agricultural Statistics Service (NASS) and the USDA Economic Research Service (ERS), *The Tenure, Ownership, and Transition of Agricultural Land (TOTAL) Survey* is our nation's best source of information on agricultural land ownership, landlord characteristics, and land transfer plans. It is a comprehensive study of all land rented out for agricultural purposes, including land rented out by farmers and ranchers (operator landlords) and land rented out by those who do not operate a farm (non-operator landlords).

The most recent TOTAL survey was in 2014, with data released in August 2015. While TOTAL collected data in the 48 contiguous states, estimating 911 million acres of land in farms in 2014, state level data is only available for 25 states. These data show critical information on land ownership/rental trends, as well as land transfer, which are vital to informing public policy. For instance, the 2014 survey found, among other things, that 39% of the nation's agricultural land is rented, primarily by non-operator landowners, although rental rates for the Midwest region were 54%. It also found that 10% (93 million acres) of agricultural land was expected to be transferred between 2015-2019, of which only about a quarter (21 million acres) was to be sold to nonrelatives.

For more information, see the [U.S. Farmland Ownership, Tenure, and Transfer report](#), which was primarily built off TOTAL survey data, and the Farmland Information Center's [TOTAL summary factsheet](#). For raw data, see the [NASS Quick Stats database](#).

Recommendations:

There are several steps that can be taken to improve the TOTAL survey and make its findings even more relevant for policymakers, such as to:

- Dedicate \$15 million of funding in the next Farm Bill for an expanded version of the survey. These additional resources are essential to enact many of the recommendations that follow.
- Expand TOTAL to enable state-level findings for all 50 states.
- Increase the frequency of the TOTAL survey to every five years, as opposed to its current rate of every ten years. In addition to providing more recent information on trends, this could improve the understanding of issues such as farm consolidation.
- Collect additional data regarding:
 - Principal landlords (e.g., foreign/domestically owned, individual or entity, type of entity [corporation, partnership, real estate investment trust, or other type of institutional investor]) as well as demographic information such as race, ethnicity, and gender.
 - Landlord investments in conservation and conservation program participation.
 - Types of rental agreements (e.g., existence of formal contract, length of contract) and whether the rental agreement requires and/or incentivizes conservation plans and practices.
 - Whether or not landowners have an identified heir and, if so, if their heir plans to keep the land in agricultural use. In addition, for landlords who recently sold land, ask if the next owner was a farmer.
 - If the land is under a conservation easement, whether or not the easement is through ACEP or another source. If the land is not under easement, the survey should ask whether the landowner(s) would, or have considered, placing their land under a conservation easement.
- Make the TOTAL survey data more accessible to stakeholders by:
 - Publishing more complete sets of printed tables (currently NASS only produces a highlights report and offers some preset queries)
 - Producing ERS reports with data

- Offering access to record-level information through the data enclaves at a reasonable cost while meeting requisite data privacy requirements.

Establishing a Commission on Farm Transitions

According to AFT findings based on the 2014 TOTAL survey data, seniors aged 65 and older own more than 40% of the agricultural land in the United States, suggesting an impending transfer of more than 370 million acres of farmland in the next two decades. Despite this transition of land, finding and affording appropriate agricultural land remains the single largest barrier for young and beginning farmers and ranchers. For instance, only one-quarter of farmland is sold on the open market, and this land is often only affordable to well-capitalized, well-established buyers.

In response, Congress authorized a “Commission on Farm Transitions—Needs for 2050” in the 2018 Farm Bill to elevate and address the challenges of this pending generational transfer of agricultural land, businesses, and infrastructure. The 10-member Commission was to be tasked with studying issues impacting the transition of agricultural operations to the next generation of farmers and ranchers, including:

- The availability of quality land and necessary infrastructure, affordable credit, adequate risk management tools, and apprenticeship and mentorship programs
- The state of current agricultural asset transfer strategies and potential improvements
- Incentives to facilitate agricultural asset transfers to the next generation of farmers and ranchers, including an assessment of how current federal tax policy impacts lifetime and estate asset transfers, and impacts individuals seeking to farm who do not have a farm family lineage, as well as recommendations for new or modified incentives
- The effectiveness, and potential improvements, of transition assistance programs and incentives

Intended for completion within one year of enactment, the Commission was never constituted. The Commission represents an excellent opportunity to identify and develop support for strategies that will help older farmers and landowners retire and help a new, diverse generation of producers build strong and successful farm enterprises.

For more information, see AFT’s 2021 transition paper titled [“Establishing a Commission on Farm Transitions.”](#) The authorizing language can be found in Sec. 12609 of the [2018 Agriculture Improvement Act \(Farm Bill\)](#).

Recommendations:

The following steps can be taken to advance the Commission on Farm Transitions as part of the next Farm Bill and improve upon the original concept:

- Include dedicated funding for the Commission on Farm Transitions.
- While the Commission should focus on the challenges facing all next-generation farmers, it should provide *special emphasis* on identifying and addressing the unique challenges facing next-generation Black, Indigenous, and People of Color (BIPOC) farmers and ranchers in their ability to inherit or purchase agricultural assets, including land.
- The Commission should help shape the TOTAL survey and play a unique role in analyzing its data for the purpose of developing the Commission’s recommendations.