



P+M Submarine
– Dive with us
and discover
hidden insights

Offer from P+M

Why Digital Farming Solutions Still Fall Short in Practice

A qualitative deep dive into telematics, connected services and digital farming workflows

June 2026



The Upcoming Submarine Dive

P+M Submarine combines the flexibility of an omnibus with the depth of qualitative in-depth interviews.

- The upcoming June 2026 dive focuses on telematics, connected services and digital farming workflows. Clients can join with their own question blocks — related to the main topic or another topic that fits the interview context.
- The dive starts with German pilot interviews and can be expanded to a full German module with $n = 10$ interviews based on client interest.
- Future Submarine modules can address other questions or be shaped around a client-led main topic.



Digital Farming Adoption: A Shared Challenge

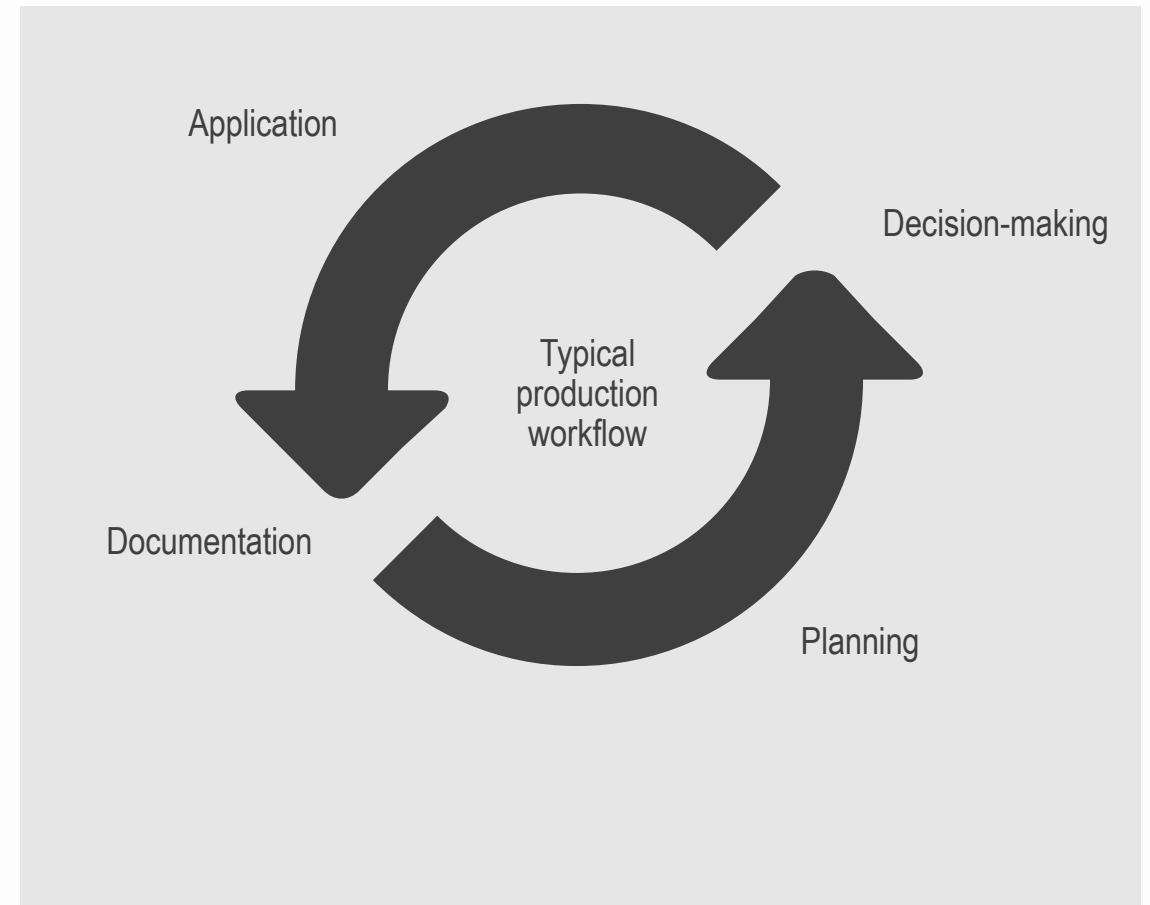
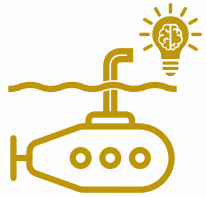
Turning digital potential into practical value

Digital solutions are widely available — but their value depends on whether farmers can **INTEGRATE THEM INTO DAILY ROUTINES** with confidence, trust and a clear sense of benefit.

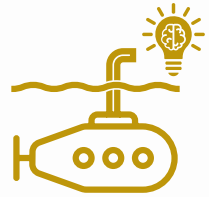
This applies wherever products, services or recommendations rely on data, documentation or connected workflows.

Relevant perspectives cover the **FULL PRODUCTION WORKFLOW** — from machinery and inputs to application, documentation, farm management and decision support.

We uncover where digital workflows create value, where they break down and **WHAT FARMERS NEED TO MOVE FORWARD.**



Our Next Deep Dive: Where Digital Farming Gets Stuck



Understanding pain points, adoption barriers and solution expectations

The value of digital solutions is often lost in daily routines: between field, machine, office, advice and decision-making.

The upcoming dive explores where farmers experience friction, why digital workflows are not always used to their full potential and what would help turn technology into practical everyday value.

Questions to explore based on client interest

- Where exactly do digital workflows break down?
- Which functions are used, ignored or misunderstood?
- What makes data transfer, documentation or decision support difficult?
- What kind of support, onboarding or training would really help?
- What would increase trust, confidence and long-term usage?

Client-specific questions and results remain exclusive to the respective client.

What do
farmers need to
turn technology
into everyday
value?

Qualitative Deep Dive: Understanding the “Why” Behind Usage



Going beyond what farmers use — to why they use it, avoid it or struggle with it

Digital adoption is rarely blocked by one single issue. It is shaped by workflows, habits, confidence, support, interoperability, perceived value and emotional acceptance.

Qualitative interviews reveal what standard surveys often miss:

- Where farmers experience friction in daily routines
- Which barriers are technical, practical, emotional or knowledge-related
- How farmers evaluate the real value of digital tools
- What kind of support would make adoption easier
- Which moments create confidence — or frustration



With P+M Submarine, we translate farmer experiences into actionable insights for product, service and communication strategy.



Why Join a Submarine Module?

Qualitative depth with the flexibility of an omnibus



Fast access

Join an upcoming module without setting up a full exclusive study from scratch.



Flexible scope

Choose the depth that fits your question — from a focused question block to leading the main topic.



Efficient setup

Share the overall interview framework while receiving exclusive answers to your own questions.



Lower entry barrier

Explore a topic qualitatively before committing to a larger research project.



Actionable reporting

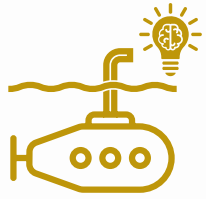
Get a clear PowerPoint report with key insights, farmer quotes and recommendations..

P+M Submarine: From first questions to evidence-based decisions — quickly and flexibly.



How the Submarine Works

A structured process from research focus to actionable insights



1. Define the module focus

Each Submarine module is usually built around a main topic, based on $n = 10$ in-depth interviews with farmers. The main topic defines the core respondent profile and the largest share of interview time.

Clients can join at different participation levels — from adding a focused question block on any topic to leading the main topic.

2. Develop the discussion guide

We develop a qualitative discussion guide around the module focus and tailor it to participating clients' priorities according to the selected participation option.

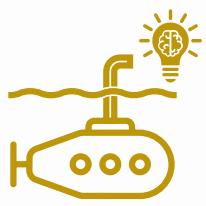
3. Dive into farmer reality

We recruit suitable farmers and conduct in-depth interviews to understand routines, barriers, motivations and expectations.

Based on client interest, the study can be expanded with additional interviews in Germany or extended to further countries such as France and the UK.

4. Surface actionable insights

Each client receives an exclusive PowerPoint report on their booked questions, including key insights, selected quotes and recommendations.



Participation Options for the German Submarine Module

Each Submarine module is designed as a dedicated qualitative study usually around a defined main topic, based on n = 10 in-depth interviews with farmers. Clients can join at different participation levels — from adding a focused question block to leading the main topic.

Trial Dive: Exclusive launch offer for the first German pilot interviews

- n = 3 IDIs
- 10 min client-specific interview time
- First indication or short exploration within the initial German pilot interviews. Screening follows the P+M baseline setup.

Snorkeling: A focused question block within a Submarine module

- n = 10 IDIs
- 10 min client-specific interview time
- Deepen one specific aspect of the main topic or briefly explore another topic across all interviews.

Deep Dive: In-depth exploration of your specific topic

- n = 10 IDIs
- 30 min client-specific interview time
- Explore a client-specific topic in depth within the shared Submarine framework

Choose the depth that fits your current information need

Dive Expedition: Your topic leads the module

- n = 10 IDIs
- 45 min client-specific interview time
- You define the main topic of the Submarine module; additional P+M or client questions may be added

The options shown refer to German Submarine modules. Additional country modules can be scoped separately based on client interest.



POWER|FARMER

Access to the Right Farmers

Our POWER|FARMER database give us direct access to German farmers who are familiar with qualitative research and willing to share detailed, practice-based feedback.

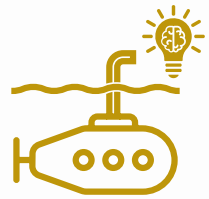
For this study, we can purposefully recruit farmers with relevant experience in telematics, connected machinery, digital documentation, precision farming and data transfer between field, machine and office.

Why this matters:

- Efficient recruitment of suitable respondents
- Inclusion of different digital adoption levels — from advanced to hesitant or partial users
- Access to both decision-makers and operators
- Insights from farmers who experience digital workflows in daily practice

Fast access | Relevant profiles | Practice-based feedback

Investment Overview



Participation options for the German Submarine module – STARTS IN JUNE 2026

| Option | Scope | Client-specific interview time | Investment |
|--------------------------------------------|------------------|--------------------------------|------------|
| Trial Dive (Exclusive launch offer) | n = 3 pilot IDIs | 10 min | € 900 |
| Optional add-on | n = 3 pilot IDIs | additional 5 min | € 400 |
| Full German module | | | |
| Snorkeling | n = 10 IDIs | 10 min | € 4.900 |
| Deep Dive | n = 10 IDIs | 30 min | € 13.900 |
| Dive Expedition | n = 10 IDIs | 45 min | € 19.900 |
| Optional add-on | n = 10 IDIs | additional 5 min | € 2.200 |

Please contact us by **19 JUNE** to participate in the German pilot interviews or add client-specific questions. The pilot follows the P+M baseline screening setup.

In the week following 19 June, it can be expanded to a full German Submarine module with **n = 10 interviews**, based on the finalized guide, respondent profiles and participating clients' interests.

For a full German module, screening preferences may be considered, depending on feasibility and participating clients' priorities.

Investments refer to the German Submarine module. Additional countries, sample extensions or specific add-ons can be scoped separately.

Why P+M?

Experienced agricultural market research, close to farmers

- We have more than 50 years of experience conducting market research across the agricultural sector around the globe.
- We know how to talk to farmers — and they enjoy talking to us.
- Our team supports clients across the full product and service lifecycle: from innovation and concept development to market understanding, positioning, communication and customer experience.
- We are especially experienced in translating complex agricultural topics — from machinery and inputs to digital services and data-based decision support — into research conversations that farmers can relate to.





Let's Discuss Your
Submarine Participation
Contact us to clarify your
questions, participation
option or potential role in
the upcoming German
module.

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The Submarine in a nutshell

Every dive starts with a question. What would you like to understand next?



THE SUBMARINE FORMAT

P+M Submarine is a flexible qualitative multi-client research format. Clients can add question blocks to a shared interview framework **whenever a module fits their information need**.

Each module usually has one main topic, which defines the core respondent profile and the largest share of interview time. **Client-specific question blocks** can address the main topic or another topic that fits the interview context.

Client-specific results remain **exclusive** to the respective client.

Future modules can be shaped around client-led topics.

THE UPCOMING GERMAN DIVE

The upcoming German dive focuses on **telematics, connected services and digital farming workflows**.

It starts with **3 German pilot interviews as an exclusive Trial Dive launch offer**. The pilot follows a broad P+M baseline setup, including high, medium and low/non-users of digital farming technology.

Based on client interest, the pilot can be **expanded to a full German Submarine module with n = 10 interviews**. In a full module, adjusted screening criteria may be possible by agreement.

Deadline for the German pilot interviews: **19 JUNE**. To participate or add client-specific questions, please contact us by this date.