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# Stress and Succession: Farmer Stress and Support Needs of Agricultural Advisors During Transition Planning

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## ABSTRACT

**Objectives:** Given outlooks for farm succession, it is important to understand how planning impacts farmer health and how to equip individuals facilitating succession. This research explored perceptions of stress during succession planning, the perceived challenges, and professional needs to better support clients' mental health.

**Methods:** We conducted semi-structured interviews with agricultural advisors ( $n = 12$ ). Interviews were audio recorded and transcribed verbatim. Researchers applied inductive thematic analysis, using concept coding as the first-round method before engaging in code mapping and axial coding to finalize categories and determine prominent themes for each research question.

**Results:** A shared set of stressors was identified. While technical stressors were recognized, emotional stressors were most prominent. Though research was not limited to family farms, family business systems were emphasized as having specific impacts on succession. Additionally, advisors recognized relational conflict, lack of communication, and navigating uncertainty as some factors contributing to stress. Advisors noted masked stressors such as identity confusion, guilt, and a lost sense of purpose can pose significant threats to farmers' mental health. Many felt competent in identifying potential signs of distress but expressed a need for additional mental health-related training.

**Conclusions:** Continued education and the creation of a streamlined professional network and resource directory are needed to improve information sharing and programming for advisors helping farmers and farm families navigate conflict and life changes.

## KEYWORDS

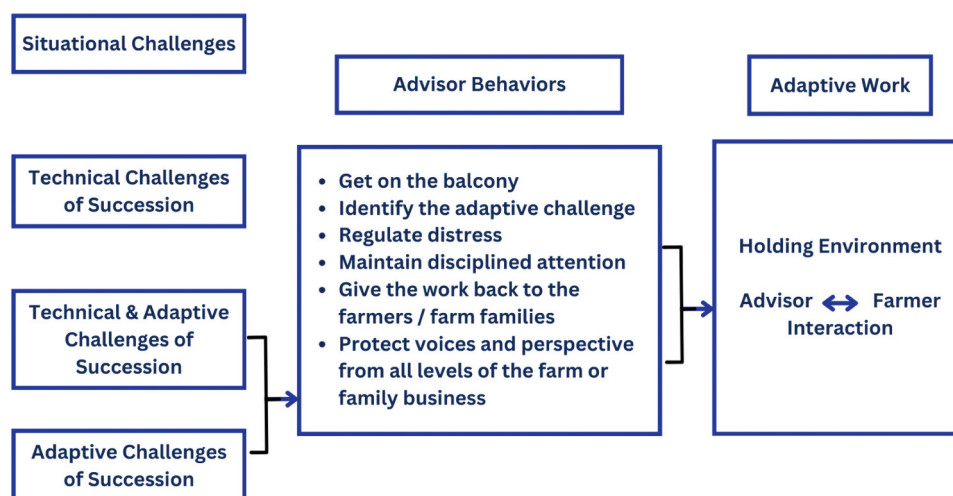
Advisors; change; family; farm business management; mental health

## Introduction

While the demand for food and agricultural products has increased with the global population, the number of farms has significantly decreased.<sup>1</sup> The average age of a farmer is 58.1 years-old,<sup>2</sup> with many farmers planning to retire, sell, or transfer assets to successors – usually to relatives.<sup>3</sup> Planning for succession requires that farmers confront the viability of their business, make difficult decisions, and have tough conversations. These challenges are compounded in familial succession when professional and personal lines are blurred. This is consistent with sentiments about farming in the United States including “farming is not only a business, but a way of life.”<sup>4,5</sup> For many, the farm is often the site of a “multi-generational family home with history and memories.”<sup>6</sup> In familial transfers, effective planning is crucial for the success and continuity of farming, though farmers might

find it difficult to cope with the idea of retirement and changing leadership. This can alter power structures within the business and family dynamics.<sup>7</sup> Research suggests planning for succession – even in non-familial transfers – is a key stressor and one of the most significant issues faced by farmers of all ages.<sup>8</sup> Without proper support, stress from succession can impact farmers' mental health.<sup>9</sup> To help navigate this transition and uncertainty, farmers turn to trusted advisors (e.g., consultants, estate planners, lawyers) to navigate transition.<sup>10</sup>

Advisors are positioned to support farmers through stress, though many feel ill-equipped.<sup>11</sup> Given trends in coming years, it is important to understand how succession could impact farmer wellbeing, the sustainability of the agriculture industry, and the longevity of generational farms. While barriers and challenges to succession planning are documented,<sup>12</sup> little exists on stress



**Figure 1.** Conceptual framework of adaptive leadership [13] during succession planning. Adapted from Northouse<sup>14</sup> for advisor–farmer interaction during succession.

impacts from the advisor perspective. There is a need to examine the observations, strategies, as well as to support needs of advisory representatives leading families through stress during succession planning. We used adaptive leadership theory,<sup>13</sup> as seen in Figure 1 as a frame for exploring advisors' capacity to lead farmers through stress brought on by succession.

This theory offers a practical approach for leaders to help followers navigate change in an organization, often in making major decisions.<sup>13</sup> Adaptive leadership is a useful tool for understanding what adaptive strategy advisors might employ to help clients' navigate this transition in their business.

### Purpose and research questions

This study explored farmer stress during succession planning from the perspective of agricultural advisors to identify challenges and professional needs to address client stress. Research questions included:

- (1) What challenges and/or stressors do advisors observe in clients as they navigate succession planning?
- (2) What do advisors need to support clients under stress and lead them through change?

### Methods

For this exploratory qualitative study, we conducted interviews with agricultural advisors ( $n = 12$ ) across the United States to understand their experiences helping farmers and families navigate stress during succession planning. Approval was granted by the University of Florida Gainesville Institutional Review Board.

### Researcher reflexivity

One member of the research team is part of a farming family and has engaged in succession conversations, which has provided them with an insider perspective. These experiences helped establish their credibility and strengthened their trust and rapport with participants.<sup>15</sup> They held the assumption that succession contributes to farm stress and advisors might be an entry point for intervention. Efforts were made through peer debriefing, member checks, and clarifying questions to control for bias.<sup>15</sup>

### Participant recruitment

We used criterion-based snowball sampling<sup>15</sup> to recruit participants. Participants had to serve in an advisory capacity to support farmers through succession or transition (e.g., estate planner,

lawyer, accountant, transition consultant, etc.). We aimed to achieve a sample reflective of various states, advisory roles, genders, and years of experience so diverse perspectives and experiences would be represented. We recruited through existing and participant-referred connections. We began by emailing an individual we knew serving in this role in their state. They provided us with names of potential colleagues and pointed us to the International Farm Transition Network. Through conversations with participants, it was expressed to us that this was a small field and niche profession, without much consistency across state lines. Regardless, we began to identify repetition in the referrals. We prioritized the direct referrals and others on the network site from underrepresented regions. To start, we emailed 20 participants. Four declined to participate and four did not respond after follow-up. We began to recognize saturation around the tenth interview and believed we reached saturation after interview number 12.<sup>16,17</sup>

### **Data collection and analysis**

We conducted semi-structured online interviews with 12 advisors using a researcher-developed protocol, informed by literature and the adaptive leadership model.<sup>9–13</sup> After obtaining consent, one researcher facilitated the interviews, which lasted approximately 1 hour. The protocol included 17 questions regarding advisors' role; observations of stress; perceived ability to respond and regulate stress; and challenges and support needs, such as "What are some challenges that your clients face as they navigate the succession planning process?"; and "How equipped do you feel to identify severe stress or distress in your clients?"

We recorded, transcribed, and returned interviews to participants for member-checking.<sup>15,18</sup> We used NVivo 12 Plus to facilitate the thematic analysis, which we used to identify, organize, and report patterns as themes.<sup>19</sup> We engaged in concept coding as a first-round method, before using code mapping<sup>20,21</sup> and axial coding<sup>22</sup> to finalize categories and establish major themes for each research question. To enhance trustworthiness, we established an audit trail, documented analysis using process memos, engaged in member checking,

used theoretical triangulation to establish credibility, and included verbatim descriptions to retain detail in quotes and participant sentiments.<sup>18</sup> Additionally, we engaged in researcher reflexivity to establish confirmability of findings.<sup>18</sup> Given the close-knit nature of the profession, we detached participant names and characteristics to protect confidentiality in reporting.

### **Participants and clientele**

We interviewed seven female and five male advisors, in various stages of their career, representing eleven U.S. states including Connecticut, Oklahoma, Iowa, Missouri, Texas, Montana, Kansas, Ohio, Idaho, Florida, and Illinois. Many advised clients nationally. Advisors' experience ranged from 5 to 45 years in both private and public industry. The group consisted of consultants ( $n = 7$ ), Extension faculty ( $n = 2$ ), a practicing attorney, estate planner, and state transition coordinator. Most advisors' clientele varied, including small to larger operators. Some advisors were trained and specialized only in family business advising, while others advised family farms and those seeking help transitioning to a non-family successor. Regardless of clientele, the majority focused on family business.

### **Results**

We identified three major themes regarding stressors that advisors observed in clients: task-related, interpersonal, and emotional stress, with sub-themes for each. According to adaptive leadership theory, these present as technical and adaptive challenges. There was also a broader discussion that the succession process and farming are couched within an inherently stress-prone system. Advisors recognized that agriculture and its accompanying uncertainty make it stressful and noted succession is just another contributing factor. One advisor said, "Farming is already full of stresses that we can't control: weather, prices, government regulation."

#### **Task-related stress**

Advisors discussed how the task-related components of succession created stress for farmers and

families. The most prominent subthemes were financial implications of succession, equity and fairness, and uncertainty.

### **Financial implications**

The financial implications of transfer came up frequently. Advisors shared that many owners raise concerns about exiting the business in fiscally responsible ways that benefit all parties. One advisor shared that clients will ask: “How do I disperse my assets at a price that I feel comfortable having for retirement, that they can pay, and that I don’t have to pay a lot in taxes either?” Advisors explained that existing business structure, health of the business and relationships, and/or liquidity of assets often impact strategies. Others discussed how there is also stress associated with a lack of transparency or financial literacy. “Sometimes folks don’t understand the financials of their own business,” one advisor said. Advisors recognized some clients have a hard time accepting that a model which had historically served the business well, might not be financially feasible after transition. “I’ve seen people who won’t even look at the numbers because they’re too scared of what they will say,” one said. Some believed the financial cost of succession (e.g., hiring a consultant or working with advisors) was a stressor or barrier, while others saw it as less of an issue for clients.

### **Equity and fairness**

Many advisors believed one of the most stressful parts of planning for succession—especially for farm families—is trying to be fair and equitable when transferring assets and responsibilities. Advisors recognized this most in heirs with mixed engagement. “A lot of my farmers and ranchers are land-rich and money poor. All they have is land. So, if we give all the land to the farmer, how do we take care of these off-farm kids?” one said. Advisors emphasized how difficult it is for senior generations to separate business transfer from their parenting roles and indicated many farmers worry about their children’s perceptions of their plan. This pressure to create a plan they perceive to be “fair” might stem from being treated unfairly themselves when they took over. One said, “Oftentimes they’ll say, ‘We want to do it the opposite of how it was done to us.’”

### **Uncertainty**

Uncertainty was another prominent subtheme of the task-related stressors. This was depicted around planning and the future. Advisors shared that either a lack of information or overload often creates decision paralysis. “People just don’t know where to start, and it’s overwhelming so they freeze in the space of ‘I don’t know what to do, so I’m just not going to do anything,’” one advisor said. When prolonged, planning uncertainty creates a “stressor domino effect” for successor generations. One advisor stated, “People just want to know the plan and what their parents are thinking. But the unwillingness to engage creates uncertainty that creates huge stress.” Often, the root of this uncertainty was a lack of communication and transparency. “I have clients that are 50–60 years old, and they have no idea what their 80-year-old dads will say; and they don’t know what they’re going to inherit,” one advisor said. “They are operating their future on a habit, assumption, hope, or a tradition. And hope is not a very good business strategy,” another echoed. Advisors were sensitive to the “don’t ask, don’t tell” culture that breeds stress, anxiety, and conflict in families. Advisors noted uncertainty and stress could be mitigated by proactive planning and open communication between generations about expectations.

### **Interpersonal stress**

We identified interpersonal stressors as another prominent theme with two sub-categories: family dynamics and conflict; and trust and relinquishing control. In these subthemes, advisors recognized that relational elements of running a business and working with family often complicate succession and create added stress.

### **Family dynamics and conflict**

Our research was not limited to farm families; however, advisors recognized family dynamics add a layer of stress during succession. One said, “These are family businesses. [There is] the complexities and additional weight of working with the people that you celebrate Christmas and New Year’s with.” In some instances, even the fear of potential conflict created stress. “I



think another one would be fear of bickering and bitterness between their children. They get along fine now, but they are worried that, should one of them pass away, that it's just going to crash and burn."

Often these stressors are brought on by past or existing conflict among family members (e.g., sibling groups, on- and off-farm heirs, partners, spouses, in-laws, etc.). Advisors described how family history, past business decisions, or hurtful behavior often led to a lack of willingness to move forward productively. "We can design and help them through all kinds of financial structures and hurdles and things like that. But if the family is experiencing stress, then it tends to create all kinds of chaos," one advisor said. While some clients are transparent about their conflict, others are not. As conflict surfaces during the process, advisors recognize conflict resolution, though a necessary step for moving forward, brought on stress.

### ***Trust and relinquishing control***

Family dynamics sometimes hindered the senior generation's ability to relinquish control. One advisor said, "I think there's a lot of stress involved with that thinking, 'Maybe my kids aren't ready. My kids are going to run it to the ground.'" At times, distrust came from an inability to separate past mistakes from present reality and view family members as equals. In other instances, these concerns were related to complicated family history (e.g., addiction, mental illness, affairs, etc.) that ultimately impacted the business. Advisors recognized these stressors are magnified during succession. When unaddressed, unhealthy family dynamics can interfere with role clarity and job expectations that complicate succession. "There's a missing part in farm families' DNA about accountability . . . Many of them have the, 'I can't be fired mentality,'" one said. Advisors also explained how informalities in family business systems (e.g., lack of documented employment policies, or systems for evaluation) perpetuate business practices that produce stress and conflict. "I do not want moms and dads bringing in the kids. I want leader/managers hiring worthy employees – who happen to be family members – earning the right for labor,

management, leadership, and potential ownership," one advisor said.

### ***Emotional stress and loss***

Emotional stressors, relating to the farming lifestyle, was another prominent theme. In this theme, farm families wrestled with complex emotions associated with change and endings – like fear of the unknown, guilt, sadness, internal conflict, and confusion about their identity and sense of purpose. One advisor said, "I would say there's a level of stress that goes with contemplating this change for everybody." Unique to this theme was the idea that farmers and farm families often deal with guilt and grief from loss during succession: "Some of them might say 'My granddaddy farmed here, my daddy farmed here, I'm farming here – but my kids don't want to farm.' There's that sense of loss that it's all going to fall by the wayside." In multi-generational operations, the pressure to succeed is about more than just business. One advisor stated, "The bigger stress is 'if I can't make this work, if I don't make the right decision, I'm going to be the one who ruins the family legacy that we've had for five generations.'"

For senior generations, it is often difficult to accept succession, especially when there is no continuation plan. Farmers might experience stress and wrestle emotionally as they are confronted with questions about their identity outside of farming. "This idea of transition itself and that process of letting go—we find there is much tied to your identity. And if you've never done any thinking on that, 65 years is a rough time to start that. I think that creates a tremendous amount of stress for some people. They just don't have the skillset to really understand what's going on for them." For many, the job is the only one they have ever known. Advisors expressed concern when these emotional stressors of succession materialize in clients as a loss of purpose. One stated, "[They've] put every last minute and penny back into the business. There is no life outside of farming, and that's a scary place to be." Advisors recognized how a key part of their role is often to help farmers and families "say goodbye" and navigate emotional stressors in healthy, productive ways *before* they lead to distress.

### **Professional challenges and support needs**

We identified four prominent categories of professional challenges and support needs to enhance advisors' ability to lead clients through change, including continued education, additional resources, peer support and mentorship, and experience. These resource gaps and professional growth areas were comprehensive and related to task, relational, and emotional components of their work.

#### **Continued education**

A need for continued education was discussed by advisors in two frames: for *themselves* and their *clients* and *others in agriculture*. Each advisor had engaged in some professional development related to their expertise. Many had training or certifications in other areas they deemed helpful for their role including: mediation and conflict resolution; facilitation, consulting, and coaching; agricultural leadership; family business and systems training; and communication styles and personality assessments. Many advisors expressed the value in continued education to help them become more aware of mental illness, identify symptoms, and implement strategies for addressing concerns. One said, "If I encounter anybody who wants to work in the transition space, one of the first things I would tell them is to dive into these trainings and get mental health first aid certified. If nothing else, you will want to have the emotional awareness the training provides." Three advisors mentioned having completed some form of mental health training, like Mental Health First Aid (MHFA) or Question-Persuade-Refer (QPR) but believed there was always room for improvement. Even those that had not gone through related trainings discussed intentions to complete them. For many advisors, succession planning is just one part of their role. They recognized their colleagues might be apprehensive to address these issues or have limited ability to engage clients in this way.

Advisors indicated professional development around succession planning for clients and the agricultural industry would be helpful. One stated, "Their worst fear is, 'I'm going to screw it up.' We have to take that fear of failure out of the equation and replace that with good education and give

people a sense of comfort." Many emphasized a need for tools and strategies to improve clients' communication and conflict resolution skills. Finally, stigma around mental illness; substance abuse and addiction; generational traumas and conflict; and seeking help at large, was discussed as a persistent challenge. One advisor said, "I think a lot of my clients want to be tough, and they want to just push through, and they don't want to talk about their feelings. And a lot of times they just suffer in silence or consume drugs or alcohol." Many emphasized that education to normalize these issues could combat stigmas upheld by the industry and help clients talk more openly about their mental health concerns with each other and advisors.

#### **Resources, referral networks, and peer support**

Participants expressed needing a more robust network of resources. Multiple advisors addressed the health professional shortages in their area. One said, "We really just lack the resources. Even if we can identify that a person is in crisis, we're like, 'Now what?' We don't have anywhere to send them, basically." In other instances, facilities existed, but advisors lacked a sound professional referral network. One advisor said, "We're coaches or consultants, ag bankers, lenders, farm creditors, and more. We need a directory – we need the names of qualified, good people at our fingertips, so that we can refer those in need." These challenges were exacerbated for advisors who served clients nationwide: "I tend to work with families all over the United States and so I don't have a good network of professionals. If that [need] comes up, I'm often on the hunt."

#### **Peer support**

Advisors discussed the need for peer support and professional mentorship. "This work is so broad across finance, business strategy, family systems. Nobody's going to really have depth in all of those. So, you need a network to lean on. I believe that strongly," one said. A few had participated in a peer professional group and discussed how it was helpful for sharing solutions and seeking advice. One said, "Often, I'll call colleagues and say, 'I've got this situation. What am I missing? What else would you do?'" Participants

emphasized the importance of peer groups for farmers for navigating succession as well. One advisor who facilitates a peer farmer group said, “If we can say ‘Look, every family has dealt with this or is dealing with it, and this is your opportunity to learn from those families.’”

This need for peer support also came up regarding helping farmers navigate mental health challenges. One advisor recalled an instance where they engaged a client’s existing peer group to help him address substance abuse challenges and navigate life changes. They said, “that peer group really helped him and from that event, which I helped coach him through, he’s been in counseling for a year and a half.” Another recognized how valuable peers can be for early identification and intervention. “It’s critical to have people with robust training on how to engage with their peers when they’re going through a mental health crisis. I think farmers and ranchers would be a lot more willing to engage with that,” they said.

### Experience

Finally, the theme of experience came up. In addition to their varied education and training (i.e., law, accounting, counselling, accounting, conflict resolution, etc.), advisors had a combined 232 years of experience in succession work. They often used case-study-like scenarios to describe challenges, and propose strategies and/or solutions to those issues. It was evident this skillset came with time on the job. One advisor echoed this saying, “Many who aspire to be consultants have good technical skills, but they don’t have the experience. They don’t have the stories.”

Many participants worked with clients with mental illness, addiction, anger management challenges, abuse, generational trauma, or family history of suicide. Some advisors recalled events in their careers when they intervened or referred clients to professionals. These stories often translated to how equipped they felt to engage and support clients. One said, “I have no problems having a somewhat personal conversation with any of my clients, if that’s what I feel needs to happen, and/or refer them to somebody to get help if they need to.”

Other advisors had *personal* challenges or experiences with mental illness. Others had close

friends, family, or coworkers with mental illness which made them feel more equipped to respond. One participant said he felt compelled, because of their wife and her family’s experience, “If you have an experience like that, it changes your perspective on mental health. When you’ve met it face-to-face in your family or your circle of friends, you take it seriously.” Other advisors shared that a personal connection had heightened their interest and awareness of the need to address mental health in their work.

### Discussion

Succession planning creates unique stressors for farmers. While advisors identified task-related stress, the most prominent stressors were couched within the emotional elements of the business, farming lifestyle, or working with family. These align with essential leader behaviors in the adaptive leadership model, where leaders can identify *both* technical and adaptive challenges, regulate distress, and create a safe, productive environment for those they work with to process and overcome those challenges.<sup>13</sup> Their ability to recognize that client problems are unique and require adaptive approaches would indicate that the adaptive leadership model could be useful for facilitating succession, in interfamily and non-familial transfers.<sup>13,23</sup>

Advisors noted the significance of the family unit on succession and how it can amplify stressors across all three themes. This supports previous research emphasizing the effects of relationships and family dynamics on transition.<sup>2,24</sup> Family dynamics muddled distribution of roles and assets and often hindered communication between generations, which contributed to feelings of uncertainty. However, the broader consensus from participants indicated the *amount*, *severity*, and *source* of stress varies widely by each client and context. Future research should examine roadblocks in intergenerational communication and identify effective communication strategies to inform practice (e.g., tips for starting conversations with family members about planning, navigating difficult conversations).

Uncertainty was a prominent stressor that led to problem avoidance and hindered farmers’



decision-making. This aligns with literature that suggests despite aging ownership, only 50%–56% of farms are engaged in succession planning.<sup>2,3,25</sup> Similar to our study, lack of time, family dynamics, and not knowing where to begin are some of the most prevalent roadblocks in literature.<sup>3</sup> However, stress caused from uncertainty in younger generations due to a lack of planning or communication from senior generations, which was prominent in our study, is less represented in literature. Additionally, advisors were concerned about the potential health impacts of identity confusion, guilt, and a lost sense of purpose. These were described as unique, masked stressors. Existing research has started to uncover the benefits and challenges of the “farmer identity” and its impact on farmer wellbeing.<sup>26,27</sup> Given that family-owned farms make up 95% of all U.S. farms,<sup>2</sup> advisors should be trained to adequately cater to family farms and be equipped to navigate the tensions of family business on farming operations and succession. Future research should examine succession from farm family perspectives including adaptive behaviors they exhibited to successfully navigate change. Additional studies should explore the phenomena of farmer identity and guilt in the context of legacy and generational transfers, and its impact on stress and mental well-being.

Adaptive leadership theory emphasizes learning, reflection, and self-correction as they continually find ways to adapt and improve for their clients.<sup>13</sup> Advisors emphasized the need for experience and peer mentorship for professional growth and development. Many believed they had baseline competence for identifying signs of stress but believed they needed more education and resources to best support clients’ mental health.<sup>28,29</sup> The impact of *experience* on advisors’ perceived competence in addressing mental health was surprising. Those with more varied backgrounds or extensive experience in these areas often conveyed more confidence to support distressed clients. We recommend creating regional peer advisory networks for information-sharing and leadership development to improve advisor efficacy,<sup>28–30</sup> improve mental health literacy, and strengthen multi-state connections and resources. These could be facilitated through state Extension systems or regional centers for agricultural safety

and health. States and regional centers should conduct needs assessments to determine more local priorities. Based on our findings, programming might include a mentorship program to pair seasoned professionals with novice advisors. Curriculum development could prioritize case studies, based on advisor-client experiences that depict common scenarios and strategies. Training to equip agricultural advisors in adaptive leadership strategies could be helpful to improve their capacity to help clients navigate stress during succession. Other professional development should prioritize mediation and conflict resolution, emotional intelligence, and family business transition. Additional mental health, substance abuse, and crisis response training would be valuable for improving agricultural advisors’ existing capacity.

These advisors were sensitive to client stressors and interested in improving their practice, but they were also aware of limits in their capacity and expertise. They reinforced the need for a referral network of succession and health professionals. Advisors who did not express resource or referral concerns appeared to be part of larger, more integrated firms or institutions that had direct access to health professionals or worked with consultants nationwide. Concerns about provider shortages align with existing literature, which exposes mental health resource gaps for rural and agricultural individuals.<sup>26,31</sup> We recommend creating or updating the existing national resource directory through International Farm Transition Network to include a more comprehensive list of support advisors involved with farm succession planning (e.g., lawyers, accountants, consultants, estate planners, state program directors, and Extension specialists) and culturally responsive mental health professionals.<sup>32–34</sup>

## Conclusion

While previous studies have examined the role of advisory professionals in supporting farmer wellbeing,<sup>9–11</sup> this study uniquely sought to examine stress from the advisors’ perspectives and examine their professional needs for supporting clients. We found these advisors were aware of concerns with farmer mental health, sensitive to client stress, and interested in improving their

practice to holistically support clients through succession. In addition to task support, advisors should be equipped to address interpersonal and emotional stressors. Family business systems can significantly impact succession. Advisors recognized relational conflict, lack of communication, and navigating uncertainty as stress-inducing. Masked stressors like identity confusion, guilt, and a lost sense of purpose can threaten farmer mental health, leading to negative outcomes, even suicide.<sup>35</sup> More training and resources for advisors to support total farmer health and facilitate effective transition are needed. Finally, this research uncovered that the landscape of succession support varies widely by region. Often these networks are scattered and siloed. This was experienced during participant recruitment, which highlighted barriers to succession and stress resources and underscored the need for a more formalized network. However, this also created potential research limitations. Given the size and scope of our sample, perspectives might not reflect all advisor experiences. This exploratory study was intended to provide initial evidence of the need for additional support for agricultural advisors and was not intended to transfer nationally. Advisory networks should work to understand the unique challenges of farmers in their state.

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