European Commission

Special Eurobarometer 520

Report

Europeans, Agriculture and the CAP

Fieldwork: February-March 2022

Special Eurobarometer 520
Europeans, Agriculture and the CAP

Survey conducted by Kantar on behalf of Kantar Belgium

at the request of the European Commission, Directorate-General for

Agriculture and Rural Development (DG AGRI)

Survey coordinated by the European Commission, Directorate-General for Communication

(DG COMM "Media monitoring and Eurobarometer" Unit)

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INTRODUCTION

Agriculture is important for Europeans. One of the key policies in this sector is the EU common agricultural policy (CAP)[1]. The CAP is a common policy for all EU Member States, and promotes the sustainable development of EU agriculture and the wellbeing of rural areas. It is managed in cooperation with the Member States and funded almost entirely at European level from the resources of the EU annual budget, of which the CAP accounts currently for around 30% of the total.

Launched in 1962, the CAP is a partnership between agriculture and society, and between Europe and its farmers. It aims to:

- Support farmers and improve agricultural productivity, so as to ensure a stable supply of affordable food;
- Ensure a fair standard of living for farmers;
- Help tackle climate change and the sustainable management of natural resources;
- Maintain rural areas and landscapes across the EU;
- Promote a vibrant rural economy and society by promoting economic diversification and harnessing innovation to create growth and jobs in farming, the agro-food industries, and other economic sectors across rural areas;.

To consolidate the role of European agriculture for the future, the CAP has evolved over the years to meet changing economic circumstances and the requirements and needs of citizens.

In June 2018, the European Commission presented legislative proposals for a new CAP. The reform aims to boost the economic, social and environmental sustainability of the CAP in line with the political priorities of the Commission, in particular the European Green Deal. It includes provision for more targeted support for small farms and greater flexibility for EU countries to adapt measures to local conditions.

After extensive negotiations between the European Parliament, the Council of the EU and the European Commission, agreement was reached on CAP reform and the new CAP was formally adopted on 2 December 2021. The new CAP is due to be implemented from 1 January 2023.

The current survey was commissioned by the European Commission, Directorate-General for Agriculture and Rural Development, to explore public opinion about agriculture and the CAP. It follows on from previous surveys on this topic in August-September 2020[2], December 2017[3], October 2015[4], November-December 2013[5], May 2011[6], November 2009[7],and November-December 2007[8]. It covers the following topics:

- Opinions on the importance of agriculture and rural areas, and about the situation of rural areas;
- The role of agriculture and farmers in fighting climate change;
- Perceptions of the level of food security and of risks related to food security in the EU;
- The responsibilities of farmers in our society;
- What the main objectives of the EU for agriculture and rural development policy should be;
- Awareness of the CAP, opinions about how it is performing, and views on its priorities and contribution to EU society;
- Views on whether the CAP benefits all Europeans;
- Financial support for farmers, now and in the future, including justifications for the CAP budget, and views on payments given to farmers for implementing environmentally-friendly practices;
- Opinions about international trade in agricultural products including trade barriers and trade agreements;
- Factors that influence the purchase of food products, including awareness and role of quality labels;
- Perceptions of the advantages and disadvantages of organic farming;
- Special dietary needs;
- Experience with the EU school scheme under which fruits and vegetables, milk and milk products are distributed in schools, and opinions about which products should be distributed through it, which aspects should be the most important in selecting these products, and which topics should be covered by the educational measures in the EU school scheme.

Where possible, results from the current survey are compared with those in previous surveys on this issue.

This survey was carried out by the Kantar network in the 27 Member States of the European Union between 21 February and 21 March 2022. 26,511 EU citizens from different social and demographic categories were interviewed.

[1] https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cap-glance_en
[2] https://europa.eu/eurobarometer/surveys/detail/2229
[3] https://europa.eu/eurobarometer/surveys/detail/2161
[4] https://europa.eu/eurobarometer/surveys/detail/2087
[5] https://europa.eu/eurobarometer/surveys/detail/1081
[6] https://europa.eu/eurobarometer/surveys/detail/996
[7] https://europa.eu/eurobarometer/surveys/detail/777
[8] https://europa.eu/eurobarometer/surveys/detail/629

Methodology used for the survey

In some countries, **alternative interview modes** to face-to-face were necessary due to the coronavirus pandemic.

Where possible, the methodology used was that of the Standard Eurobarometer surveys carried out by the Directorate-General for Communication ("Media monitoring and Eurobarometer" Unit).[9][10] However, this was sometimes difficult because of the coronavirus pandemic, and it was occasionally impossible to conduct face to face interviews in some countries. In these countries, we interviewed respondents online, mostly after recruiting them in a probabilistic way by telephone. A technical note concerning the interviews conducted by the member institutes of the Kantar network is annexed to this report. It also specifies the confidence intervals.

In accordance with the EU General Data Protection Regulation[11] (GDPR), respondents were asked whether they would agree to be asked questions on issues that could be considered "sensitive".

Note: In this report, EU countries are referred to by their official abbreviations. The abbreviations used in this report are:

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czechia	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV		

European Union – weighted average for the 27 Member States	EU27
BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK, LV, LT	euro area
BG, CZ, DK, HR, HU, PL, RO, SE	Non-euro area

* Cyprus as a whole is one of the 27 European Union Member States. However, the *acquis communautaire* has been suspended in the part of the country not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU27 average.

We would like to thank the people across the European Union who have given up their time to take part in this survey.
Without their active participation, this study would not have been possible.

[9] https://www.europa.eu/eurobarometer
[10] The results tables are annexed. Note: the total of the percentages indicated in the tables in this report may exceed 100% in cases where the respondent was able to choose multiple answers to the same question.

[11] 2016/679

EXECUTIVE SUMMARY

More than nine in ten respondents consider that agriculture and rural areas are important for the future in the EU

More than nine in ten respondents (95%) think that agriculture and rural areas are important for the future in the European Union, with six in ten (60%) saying they are very important. In all EU Member States, more than eight in ten respondents believe that agriculture and rural areas are important for the future in the EU.

Majorities of Europeans believe that services and infrastructure are good in rural areas in their country, with proportions ranging from 85% for the environment and landscape to 50% for both health services and transport infrastructure connecting to cities. At the same time, only a minority hold this view about job opportunities (37%).

Opinions on the state of services and infrastructure in rural areas vary widely across the EU: for instance, 87% of respondents in Malta say health services are good, compared with 21% in Bulgaria.

Providing safe, healthy and sustainable food of high quality is seen as, by far, the main responsibility of farmers in EU society and the main objective of EU agricultural and rural policy

Half of respondents (50%) consider that **providing safe, healthy, and sustainable food of high quality i**s one of the main responsibilities of farmers in our society. Around a quarter of Europeans mention **securing a stable supply of food in the EU at all times (26%, +6 percentage points since 2020).** The proportion of respondents who mention securing a stable supply of food in the EU at all times as the main responsibility of farmers has risen in 25 EU Member States.

Concerning the main objectives of the EU for agriculture and rural development policy, six in ten Europeans (60%) consider that **providing safe, healthy and sustainable food of high quality** should also be one of the main objectives. Nearly half of Europeans believe that **securing a stable supply of food in the EU at all times** (49%, +6 percentage points) should be a main objective of the CAP; this view has gained ground in 22 EU Member States, and at least ten percentage points in six countries (FI, LT, SE, EL, ES, IT). In addition, more than half of respondents cite **'ensuring reasonable food prices for consumers'** (55%, +6, one of the two largest increases since 2020)

Two-thirds of Europeans (67%) agree that EU farmers need to change the way they work to fight climate change. However, over half (58%) consider that agriculture has already made a major contribution to fighting climate change. A minority (38%) think that agriculture is one of the major causes of climate change. Six in ten respondents (60%) are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint; a reduction of 6 percentage points since 2020.

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Regarding food security, a majority of Europeans believe that the level of food security has stayed the same or increased compared with ten years ago, both in their country (41% and 40% respectively) and in the EU as a whole (41% and 38% respectively). However, more than half (54%) think that extreme weather events (such as increasingly severe floods, and droughts) and climate change are the most important risks to food security in the EU.

Seven in ten Europeans have heard of the CAP, and over three-quarters consider that the CAP benefits all European citizens and not just farmers

Seven in ten respondents (70%) have heard of the support the EU gives farmers through its CAP, including 61% who 'don't really know the details' and only 9% who know the details. This is the second highest awareness level since 2013. In every EU Member State, over half of respondents have heard of the support that the EU gives farmers through the CAP, with proportions ranging from 92% in Lithuania to 57% in Italy.

Large majorities of respondents think that the EU, through the CAP, is fulfilling its role in the seven areas tested. For instance, at least seven in ten Europeans consider that the EU is fulfilling its role in securing a stable supply of food in the EU at all times (79%), providing safe, healthy and sustainable food of high quality (74%) and ensuring a sustainable way to produce food (70%):

More than eight in ten Europeans think that the nine priorities of the CAP tested are important, with the highest proportions for securing a stable supply of food in the EU at all times (93%), ensuring sustainable management of natural resources (92%), ensuring reasonable food prices for consumers (91%), and strengthening the farmer's role in the food chain (90%).

More than half of Europeans agree that the CAP contributes to the nine areas tested, most notably securing a stable supply of food in the EU at all times (81%), somewhat ahead of ensuring sustainable management of natural resources (70%).

More than three-quarters of respondents (76%) agree that the CAP benefits all European citizens and not just farmers. Over half of respondents in every EU Member State share this opinion.

A majority of Europeans say the EU's financial support to farmers is about right, and over half would like to see an increase of this support over the next ten years

More respondents (46%) think that the financial support the EU gives to farmers to help stabilise their incomes is about right than those who say it is too low (39%) or too high (7%).

Asked about the main reasons why the EU spends a significant proportion of its budget on the CAP, at least a third of respondents mentions the fact that financial aid to farmers makes it possible to guarantee the food supply of Europeans (36%) and a similar share cites the fact that it ensures sustainable farming (33%).

Almost six in ten respondents (56%) would like to see an increase in EU financial support to farmers over the next ten years. Conversely, 28% would like to see no change, and 11% a decrease. A longer-term trend analysis highlights that the share of respondents who would like to see an increase in EU financial support to farmers has gained 27 percentage points since 2007.

More than nine in ten Europeans (92%) are in favour of the EU continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment:

More than eight in ten Europeans consider that agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards, while more than six in ten say trade agreements have been positive for both EU agriculture and consumers

More than eight in ten respondents (87%) agree that agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards.

However, more than half (54%) think that the EU should have trade barriers to imports of agricultural products, except for imports from developing countries, while half (50%) disagree that the EU should have no trade barriers to imports of agricultural products, regardless of their origin.

More than six in ten Europeans consider that trade agreements between the EU and other countries of the world have been positive for both themselves as consumers of food products (70%) and EU agriculture (65%). Moreover, the opinion that these trade agreements have been positive has gained five percentage points since 2020 for both EU agriculture and consumers of food products.

A short supply chain is the most important factor when buying food products, and more than six in ten respondents are aware of the organic farming logo, significantly ahead of any other logo

At least eight in ten Europeans say four factors are important in their decision to buy food products, i.e. that food products are part of a short supply chain (87%), respect local tradition and "know-how" (81%), come from a geographical area that they know (80%), and have a specific label ensuring quality (80%).

Slightly more than six in ten respondents (61%) are aware of the organic farming logo, significantly ahead of any other logo: the Fairtrade (41%), protected geographical indication (22%), protected designation of origin (16%), and traditional speciality guaranteed (16%) logos. Since 2020, most notably awareness of the organic farming logo has continued to gain ground (+5 percentage points and overall up 34% since 2017).

More than six in ten Europeans agree with five positive statements related to food products coming from organic agriculture: for 83% of respondents, organic food products comply with specific rules on pesticides, fertilisers, and antibiotics; for 81%, they are produced with better environmental practices; for 80%, they respect higher animal welfare standards; for 74%, they are of better quality; and for 65%, they taste better than other food products.

Meanwhile, more than nine in ten Europeans (92%) consider that organic food products are more expensive than other food products, and slightly more than four in ten (41%) think that they are difficult to find in the area where they live.

More than eight in ten respondents say that neither themselves personally (86%), nor at least one of their children (84%), have specific dietary needs. Food intolerance is the main cause of individual dietary needs, both for respondents personally (7%) and their children (5%).

More than one in five Europeans say they currently have children who benefit from the EU school scheme. More than eight in ten consider that fresh fruits and vegetables should be distributed through the school scheme

More than one in five respondents say they have children who currently benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme. Conversely slightly more than three-quarters of Europeans (76%) say they don't have children who currently benefit from the scheme.

Fresh fruits and vegetables (84%) are the most mentioned as products that should be distributed through the EU school scheme, according to respondents, followed by plain milk (48%) and whole grains and cereals (47%). Fresh fruits and vegetables are also the most cited products in all 27 EU Member States.

More than half of Europeans consider that seasonal products (57%) and local and short supply chain (51%) are the most important factors in the choice of products under the EU school scheme.

Respondents believe that healthy and balanced diets (56%) and food waste (56%) are the main topics, which should be covered by the educational measures in the EU school scheme, ahead of seasonal products (49%).

I. AGRICULTURE IN THE EU: PERCEIVED IMPORTANCE, RESPONSIBILITIES AND MAIN OBJECTIVES

This first chapter focuses on Europeans' perception of the importance of agriculture and rural areas in the European Union. It also examines how Europeans see connections between agriculture and climate change. It assesses how they see the level of food security in their own country and in the EU compared with ten years ago, and their perception of the most important risks to food security in the EU. It then looks at the situation of rural areas. The discussion moves on to consider the main responsibilities of farmers in EU society. It concludes with an assessment of what should be the main objectives of the EU for agriculture and rural development policy.

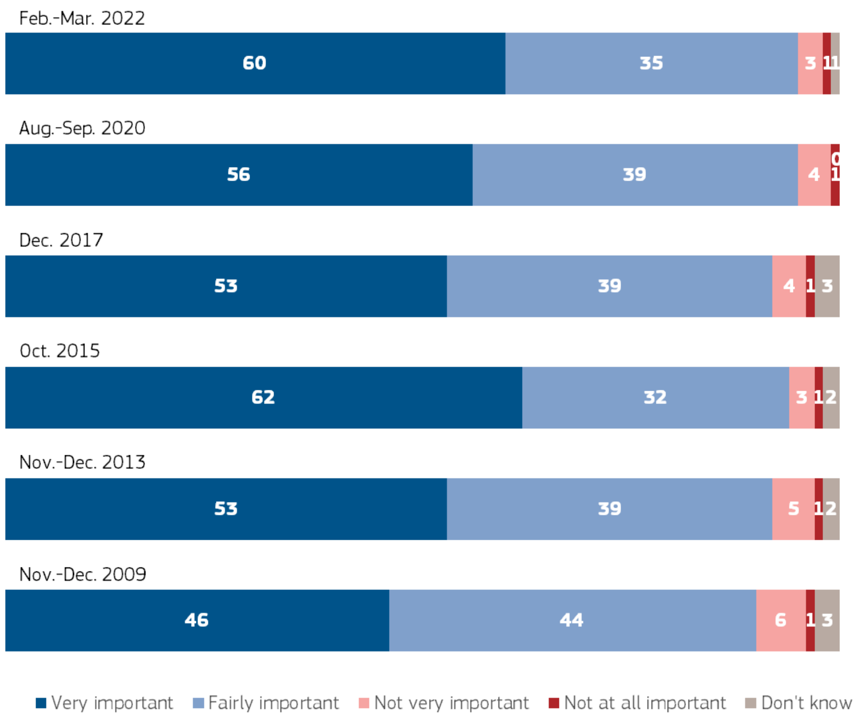
1. The perceived importance of agriculture and rural areas in the EU

More than nine in ten Europeans think that agriculture and rural areas are important for the future in the European Union

More than nine in ten respondents (95%, unchanged since 2020) consider that, in the European Union, agriculture and rural areas are important for 'our future'[12], with six in ten (60%, +4 percentage points since 2020) answering 'very important'. Meanwhile, just 4% of respondents (-1) consider that agriculture and rural areas are not important, and 1% say they don't know.

The longer-term trend shows that the share of respondents who say agriculture and rural areas are important for our future in the EU has risen by five percentage points since 2009.

QA1. Do you think that, in the EU, agriculture and rural areas are ... for our future?

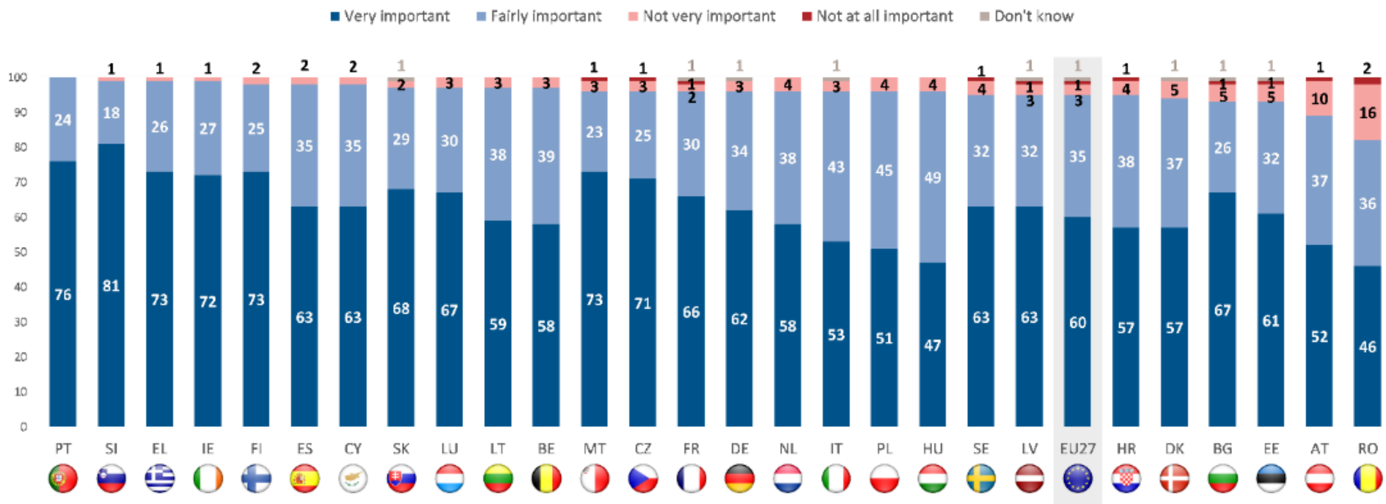


[12] QA1. Do you think that, in the EU, agriculture and rural areas are ... for our future? Very important, Fairly important, Not very important, Not at all important, Don't know.

In all EU Member States (as in 2020), more than eight in ten respondents believe that, in the EU, agriculture and rural areas are important for our future. All or nearly all respondents share this opinion in Portugal (100%), and Greece, Slovenia and Ireland (all 99%). The majority is slightly lower in Romania (82%), Austria (89%), and Bulgaria and Estonia (both 93%).

More than half of respondents think that agriculture and rural areas are 'very important' for our future in the EU in 25 EU Member States, with the highest proportions in Slovenia (81%), Portugal (76%), and Finland, Malta and Greece (all 73%).

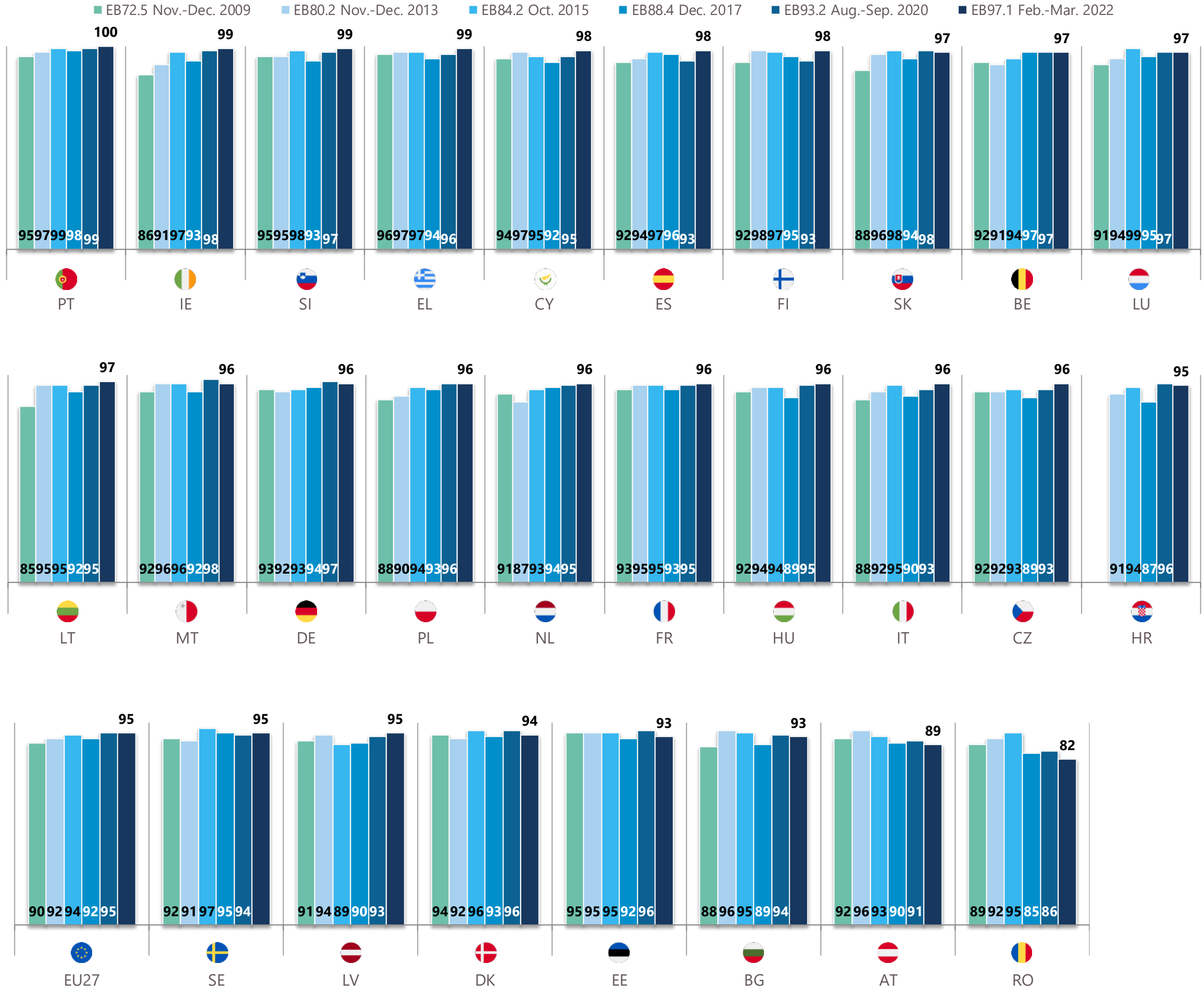
QA1 Do you think that, in the EU, agriculture and rural areas are ... for our future?
(%)



Since 2020, the share of respondents who think that, in the EU, agriculture and rural areas are important for our future has risen in 15 EU Member States, particularly in Spain and Finland (98%, both +5 percentage points). Conversely, it has fallen in nine countries, most notably in Romania (82%, -4).

A longer-term analysis reveals that this share has gained ground in 22 Member States since 2009. It has increased by more than ten percentage points in two countries: Ireland (99%, +13) and Lithuania (97%, +12).

QA1 Do you think that, in the EU, agriculture and rural areas are ... for our future?
(% - TOTAL 'IMPORTANT')



The socio-demographic data show that, in every socio-demographic category, more than nine in ten respondents consider that agriculture and rural areas are important for 'our' future in the EU. Focusing on the proportion of respondents who think that they are **very important** reveals that:

- Respondents aged 55 and over (64%), those who left school at age 15 or earlier (65%) or who continued in education up to the age of 20 or beyond (66%), managers (66%), the self-employed (65%), and retired people (66%), respondents who live in rural villages (63%), and those who almost never or never have difficulties paying bills (63%), are the most likely to believe that agriculture and rural areas are very important for our future in the EU;
- On the other hand, respondents aged 15-24 (49%), students (49%), and respondents who have difficulties paying their bills from time to time (54%) are the least likely to share this opinion.

QA1 Do you think that, in the EU, agriculture and rural areas are ... for our future?
(% - EU)

	Very important	Fairly important	Not very important	Not at all important
EU27	60	35	3	1
Age				
15-24	49	43	5	1
25-39	57	38	5	0
40-54	62	35	3	0
55 +	64	33	2	0
Education (End of)				
15-	65	32	2	0
16-19	57	38	4	1
20+	66	31	3	0
Still studying	49	45	4	1
Socio-professional category				
Self-employed	65	31	4	0
Managers	66	32	2	0
Other white collars	58	39	3	0
Manual workers	56	38	4	1
House persons	58	37	4	1
Unemployed	58	35	5	1
Retired	66	30	3	0
Students	49	45	4	1
Difficulties paying bills				
Most of the time	60	32	6	1
From time to time	54	40	5	1
Almost never/ Never	63	34	3	0
Subjective urbanisation				
Rural village	63	33	4	0
Small/ mid size town	60	36	3	0
Large town	58	38	3	0

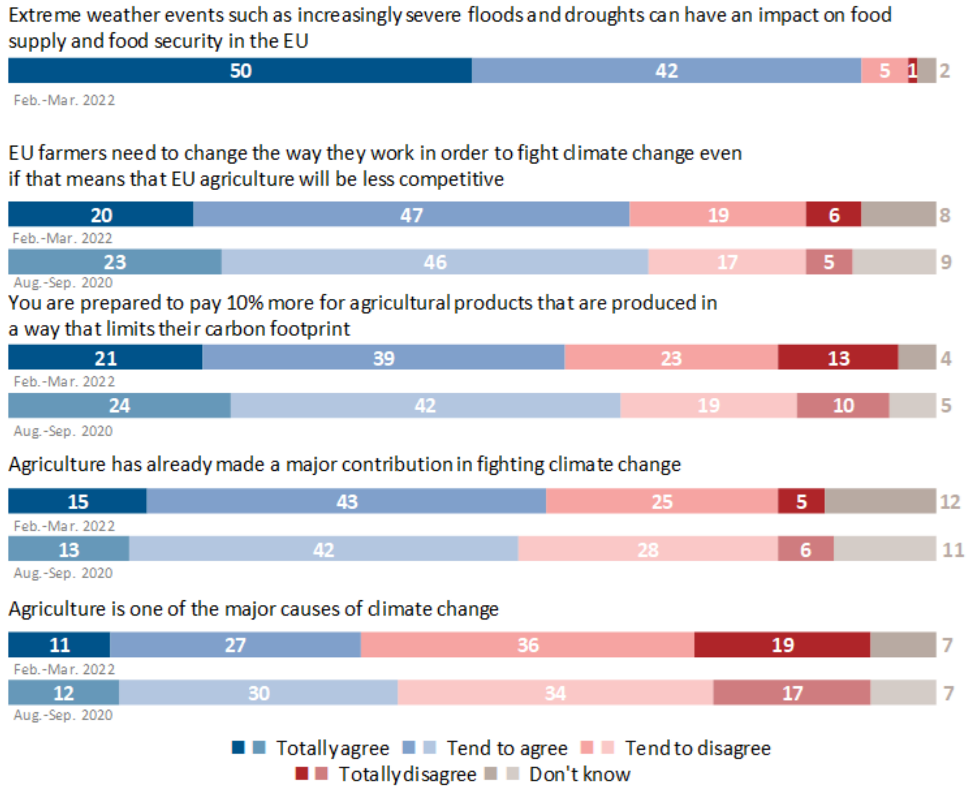
2. Agriculture and climate change

More than nine in ten Europeans agree that extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU

Respondents were asked to say whether they agree or disagree with five statements about agriculture and climate change[13] :

- More than nine in ten Europeans (92%) agree with the statement **'extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU'[14]**, with half (50%) saying they 'totally agree'. Conversely, fewer than one in ten (6%) disagree with this statement. 2% say they 'don't know';
- Two-thirds of respondents (67%, -2 percentage points since 2020) consider that **'EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive'**, including one in five (20%, -3) who 'totally agree'. Meanwhile, a quarter (25%, +3) have the opposite view, including 6% (+1) who 'totally disagree'. 8% (-1) say they 'don't know';
- Six in ten respondents (60%, -6 percentage points) answer that they **'are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint'**, with slightly more than one in five (21%, -3) saying they 'totally agree'. Conversely, over a third (36%, +7) are not prepared to pay 10%, with 13% (+3) saying they 'totally disagree'. 4% (-1) 'don't know';
- A similar proportion (58%, +3 percentage points) agree with the statement **'agriculture has already made a major contribution in fighting climate change'**, including over one in ten (15%, +2) who 'totally agree'. However, three in ten respondents (30%, -4) disagree with this statement, including 5% (-1) who 'totally disagree'. 12% (+1) 'don't know';
- For a minority of respondents, **'agriculture is one of the major causes of climate change',** with fewer than four in ten (38%, -4 percentage points) agreeing with the statement, including slightly more than one in ten (11%, -1) who 'totally agree'. Meanwhile, over half of respondents (55%, +4) disagree with the statement, with close to one in five (19%, +2) totally disagreeing. 7% (unchanged) say they 'don't know'.

QA19 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
(% - EU)



[13] QA19. Please tell me whether you agree or disagree with each of the following statements about agriculture and climate change? 1. Agriculture is one of the major causes of climate change; 2. EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive; 3. Agriculture has already made a major contribution in fighting climate change; 4. You are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint; 5. Extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU.

[14] This item appeared for the first time in this survey.

Agriculture is one of the major causes of climate change

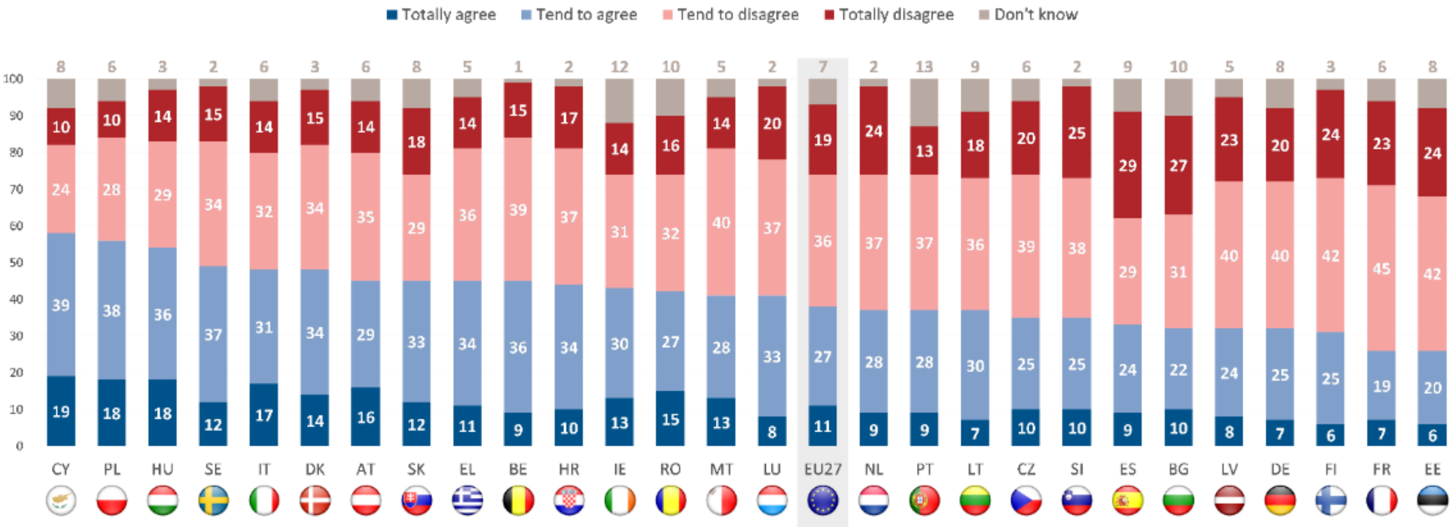
A national analysis reveals that a relative majority of respondents agree with the statement 'agriculture is one of the major causes of climate change' in only four Member States. This is the case in Cyprus (58%), Poland (56%), Hungary (54%), and Italy (48% versus 46%).

However, a minority of respondents agree with this statement in 22 EU Member States, with the lowest levels in France (26% versus 68%), Estonia (26% vs 66%), and Finland (31% vs 66%).

In 11 countries, at least one in five respondents 'totally disagree' with the statement 'agriculture is one of the major causes of climate change', and at least a quarter in Spain (29%), Bulgaria (27%), and Slovenia (25%) do so.

Respondents in Sweden are evenly divided on the statement (49% versus 49%).

QA19.1 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
(% - Agriculture is one of the major causes of climate change)



Since 2020, the share of respondents who agree that agriculture is one of the major causes of climate change has decreased in 18 EU Member States, most strikingly in Ireland (43%, -20 percentage points), Romania (42%, -14) and Portugal (37%, -13). Conversely, it has increased slightly in four countries, most notably in Poland (56%, +6) and Croatia (44%, +6). The share is unchanged in five countries.

QA19.1 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
Agriculture is one of the major causes of climate change (%)

		EU27	HR	PL	AT	HU	BE	DK	DE	IT	SI	BG	FR	LU	SK	ES	MT	SE	LT	CZ	LV	NL	CY	FI	EE	EL	PT	RO	IE
Total 'Agree'	Feb/Mar 2022	38	44	56	45	54	45	48	32	48	35	32	26	41	45	33	41	49	37	35	32	37	58	31	26	45	37	42	43
	Δ Aug/Sep 2020	▼4	▲6	▲6	▲4	▲2	=	=	=	=	=	▼4	▼5	▼5	▼5	▼6	▼6	▼6	▼8	▼9	▼9	▼9	▼10	▼11	▼12	▼12	▼13	▼14	▼20
Total 'Disagree'	Feb/Mar 2022	55	54	38	49	43	54	49	60	46	63	58	68	57	47	58	54	49	54	59	63	61	34	66	66	50	50	48	45
	Δ Aug/Sep 2020	▲4	▼4	▼4	▼4	=	=	▲3	▼1	▲4	▲1	▲9	▲8	▲3	▲8	▲2	▲13	▲4	▲9	▲13	▲12	▲11	▲7	▲8	▲4	▲12	▲15	▲12	▲8
Don't know	Feb/Mar 2022	7	2	6	6	3	1	3	8	6	2	10	6	2	8	9	5	2	9	6	5	2	8	3	8	5	13	10	12

The socio-demographic data show that only a minority of respondents in all socio-demographic categories consider that agriculture is one of the major causes of climate change:

- Respondents aged 55 and over (36%), those who left school at age 15 or earlier (34%), house persons (36%), retired people (36%), and those who live in rural villages (33%) are the least likely to agree that agriculture is one of the major causes of climate change;
- Conversely, respondents aged 25-39 (42%), those who continued in education up to the age of 20 or beyond (41%), managers (42%), self-employed people (42%), Europeans who have difficulty paying their bills from time to time (44%), and respondents living in a large town (44%) are the most likely to hold this view.

Moreover, a relative majority of those who consider that the EU financial support for farmers is too high (49%) consider that agriculture is one of the major causes of climate change.

QA19.1 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
Agriculture is one of the major causes of climate change (% - EU)

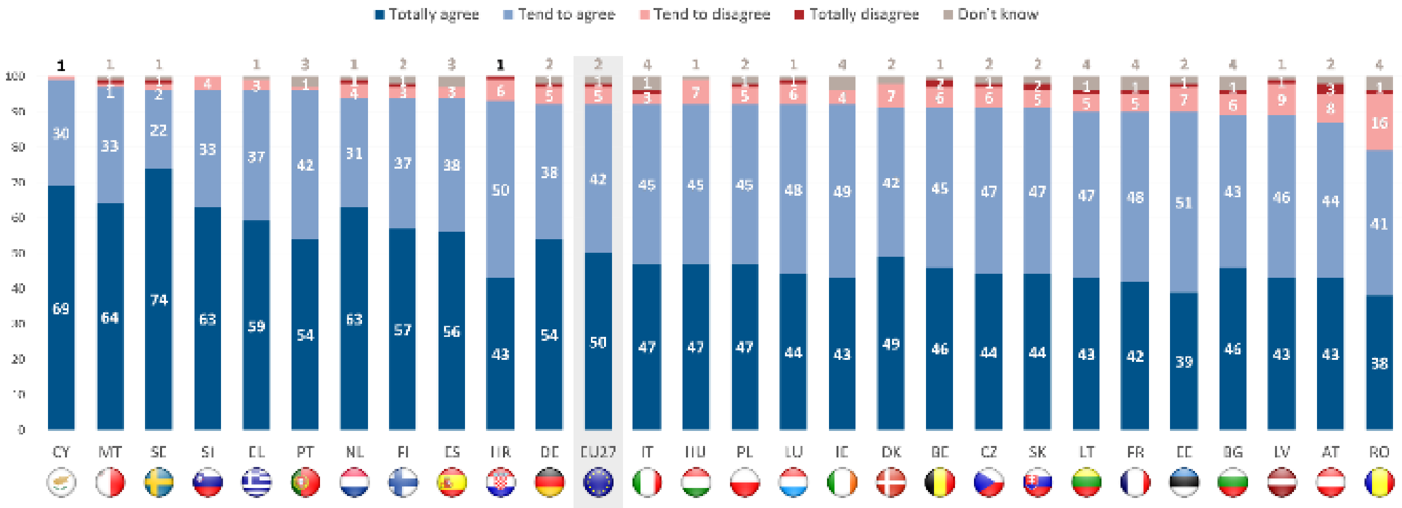
	Total 'Agree'	Total 'Disagree'
EU27	38	55
Age		
15-24	38	55
25-39	42	53
40-54	39	55
55 +	36	56
Education (End of)		
15-	34	54
16-19	37	57
20+	41	55
Still studying	40	53
Socio-professional category		
Self-employed	42	54
Managers	42	54
Other white collars	41	54
Manual workers	39	54
House persons	36	55
Unemployed	38	55
Retired	36	56
Students	40	53
Difficulties paying bills		
Most of the time	39	53
From time to time	44	48
Almost never/ Never	37	57
Subjective urbanisation		
Rural village	33	59
Small/ mid size town	38	56
Large town	44	50
View on EU financial support for farmers		
Too low	32	63
About right	45	50
Too high	49	47

Extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU

In all 27 EU Member States, more than three-quarters of respondents say they agree that extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU. Nearly all respondents hold this view in Cyprus (99%), Malta (97%), and Greece, Portugal, Slovenia and Sweden (all 96%). At the other end of the scale, fewer than nine in ten respondents agree with this statement in Romania (79%), Austria (87%), and Bulgaria and Latvia (both 89%).

More than a third of respondents 'totally agree' with this statement in all 27 EU Member States, with the highest scores in Sweden (74%), Cyprus (69%), and Malta (64%).

QA19.5 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
(% - Extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU)



The socio-demographic data show that, in all socio-demographic categories, more than eight in ten respondents agree that extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU.

QA19.5 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
Extreme weather events such as increasingly severe floods and droughts can have an impact on food supply and food security in the EU (% - EU)

	Total 'Agree'	Total 'Disagree'
EU27	92	6
Gender		
Man	92	6
Woman	92	5
Age		
15-24	90	6
25-39	92	7
40-54	92	6
55 +	92	5
Education (End of)		
15-	90	5
16-19	91	7
20+	94	5
Still studying	91	5

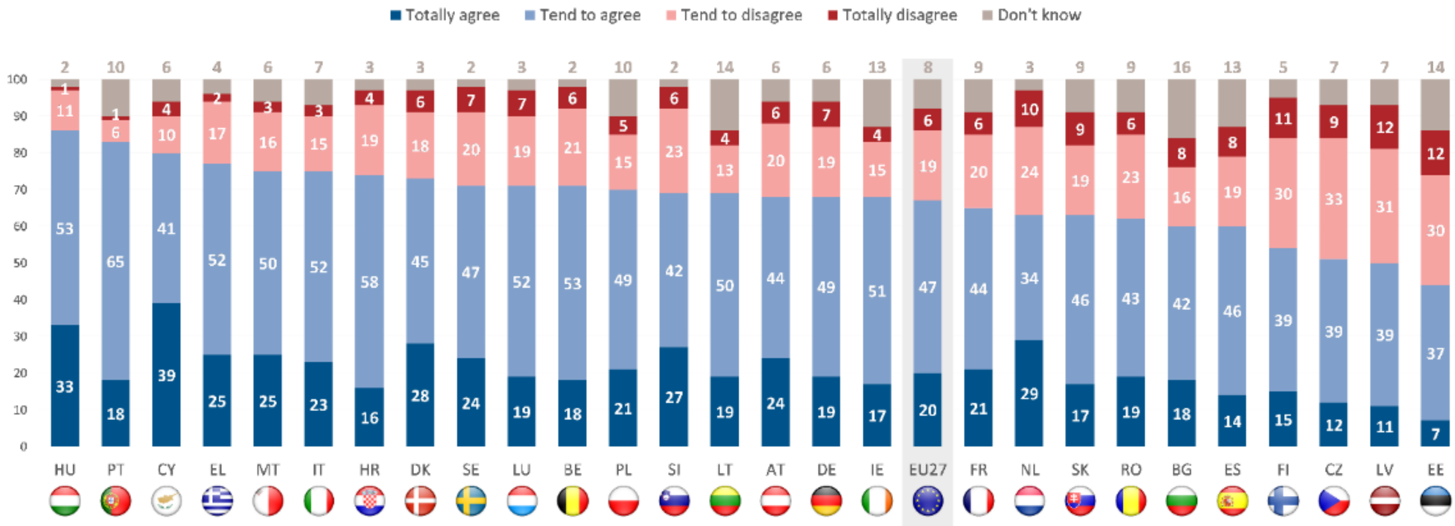
EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive

A majority or relative majority of respondents in all 27 EU Member States agree that 'EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive'. At least eight in ten respondents hold this view in Hungary (86%), Portugal (83%), and Cyprus (80%), whereas the relative majority is smaller in Estonia (44% versus 42%), Latvia (50%), and Czechia (51%).

More than one in five respondents 'totally agree' with this statement in 12 EU Member States, with the highest proportions in Cyprus (39%), Hungary (33%), and the Netherlands (29%).

Since 2020, the share of respondents who believe that EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive has fallen in 18 EU Member States, most notably in Ireland (68%, -12 percentage points), Slovakia (63%, -12), Bulgaria (60%, -10), Czechia (51%, -10), and Estonia (44%, -10). Meanwhile, it has risen slightly in eight countries, notably in Austria (68%, +5). It is unchanged in Cyprus.

QA19.2 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
(% - EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive)



QA19.2 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive (%)

		EU27	AT	HU	DK	IT	DE	PL	PT	HR	CY	LT	BE	EL	LU	RO	SE	FR	LV	MT	SI	FI	ES	NL	BG	CZ	EE	IE	SK
Total 'Agree'	Feb/Mar 2022	67	68	86	73	75	68	70	83	74	80	69	71	77	71	62	71	65	50	75	69	54	60	63	60	51	44	68	63
	Δ Aug/Sep 2020	▼2	▲5	▲4	▲3	▲3	▲2	▲2	▲2	▲1	=	▼1	▼2	▼2	▼3	▼4	▼4	▼5	▼5	▼5	▼5	▼7	▼8	▼9	▼10	▼10	▼10	▼12	▼12
Total 'Disagree'	Feb/Mar 2022	25	26	12	24	18	26	20	7	23	14	17	27	19	26	29	27	26	43	19	29	41	27	34	24	42	42	19	28
	Δ Aug/Sep 2020	▲3	▼6	▼1	=	▲1	▲3	▼1	▲1	=	▲1	▲1	▲1	▲5	=	▲4	▲2	▲6	▲12	▲9	▲8	▲2	▲1	▲8	▲7	▲17	▼4	▼1	▲14
Don't know	Feb/Mar 2022	8	6	2	3	7	6	10	10	3	6	14	2	4	3	9	2	9	7	6	2	5	13	3	16	7	14	13	9

The socio-demographic data reveal that more than six in ten respondents in every socio-demographic category think that EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive.

QA19.2 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
EU farmers need to change the way they work in order to fight climate change even if that means that EU agriculture will be less competitive (% - EU)

	Total 'Agree'	Total 'Disagree'
EU27	67	25
Gender		
Man	68	26
Woman	68	23
Age		
15-24	68	24
25-39	67	27
40-54	68	26
55 +	68	23
Education (End of)		
15-	62	25
16-19	68	25
20+	70	25
Still studying	70	21

You are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint

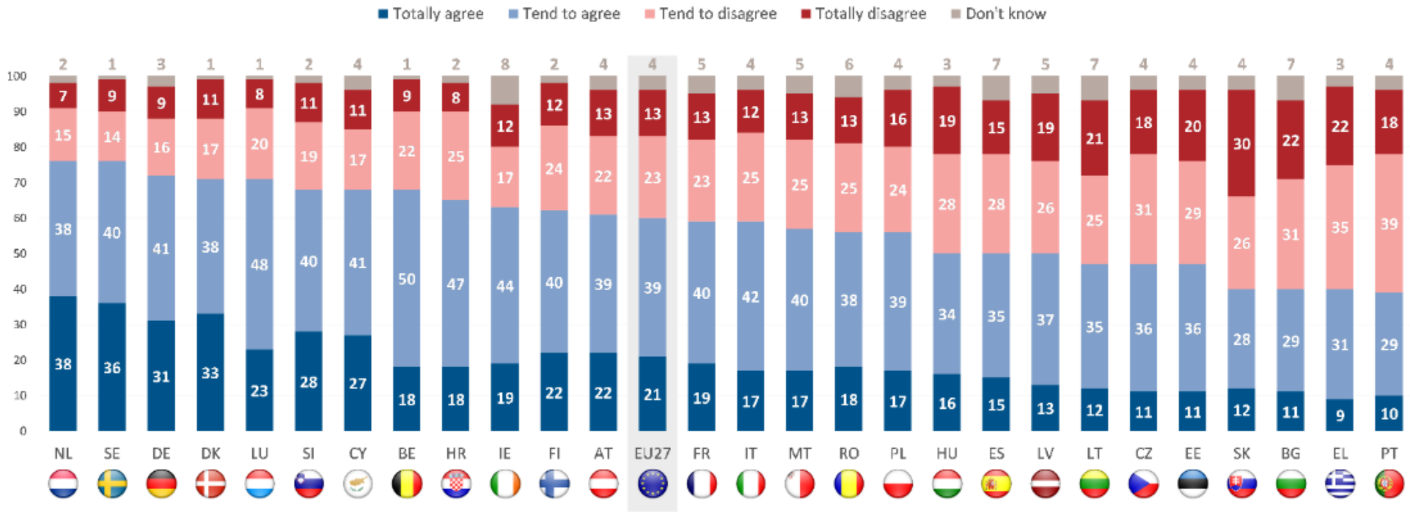
A national analysis reveals that a majority or relative majority of respondents in 21 EU Member States are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint, with the highest levels in Sweden and the Netherlands (both 76%), and Germany (72%). There is a much narrower relative majority in Lithuania (47% versus 46%).

More than one in five respondents in nine EU Member States 'totally agree' with this statement, and at least a third do so in the Netherlands (38%), Sweden (36%), and Denmark (33%).

In six EU Member States, only a minority of respondents are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint: in Portugal (39% versus 57%), Greece (40% vs 57%), Slovakia (40% vs 56%), Bulgaria (40% vs 53%), and Czechia and Estonia (47% vs 49% in both countries).

At least one in five respondents say they 'totally disagree' with this statement in Slovakia (30%), Greece and Bulgaria (both 22%), Lithuania (21%), and Estonia (20%).

QA19.4 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
(% - You are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint)



	NL	SE	DE	DK	LU	SI	CY	BE	HR	IE	FI	AT	EU27	FR	IT	MT	RO	PL	HU	ES	LV	LT	CZ	EE	SK	BG	EL	PT
Totally agree	38	36	31	33	23	28	27	18	18	19	22	22	21	19	17	17	18	17	16	15	13	12	11	11	12	11	9	10
Tend to agree	38	40	41	38	48	40	41	50	47	44	40	39	39	40	42	40	38	39	34	35	37	35	36	36	28	29	31	29
Tend to disagree	15	14	16	17	20	19	17	22	25	17	24	22	23	23	25	25	25	24	28	28	26	25	31	29	26	31	35	39
Totally disagree	7	9	9	11	8	11	11	9	8	12	12	13	13	13	12	13	13	16	19	15	19	21	18	20	30	22	22	18
Don't know	2	1	3	1	1	2	4	1	2	8	2	4	4	5	4	5	6	4	3	7	5	7	4	4	4	7	3	4

Since 2020, the share of respondents who say they are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint has lost ground in 21 EU Member States, most dramatically in Greece (40%, -17 percentage points), Spain (50%, -16), and Ireland (63%, -13). Meanwhile, it has gained no more than two percentage points in six other countries.

QA19.4 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
You are prepared to pay 10 more for agricultural products that are produced in a way that limits their carbon footprint (%)

		EU27	HR	LV	PL	FI	LT	SE	CY	CZ	MT	BE	IT	SI	DK	FR	AT	PT	EE	NL	DE	HU	BG	LU	RO	SK	IE	ES	EL
Total 'Agree'	Feb/Mar 2022	60	65	50	56	62	47	76	68	47	57	68	59	68	71	59	61	39	47	76	72	50	40	71	56	40	63	50	40
	Δ Aug/Sep 2020	▼6	▲2	▲2	▲2	▲2	▲1	▲1	▼1	▼2	▼2	▼3	▼3	▼3	▼5	▼5	▼5	▼5	▼6	▼6	▼7	▼7	▼8	▼8	▼8	▼9	▼13	▼16	▼17
Total 'Disagree'	Feb/Mar 2022	36	33	45	40	36	46	23	28	49	38	31	37	30	28	36	35	57	49	22	25	47	53	28	38	56	29	43	57
	Δ Aug/Sep 2020	▲7	=	=	=	▼4	▲2	▼2	=	▲6	▲3	▲3	▲8	▲3	▲7	▲4	▲5	▲4	▲2	▲5	▲9	▲8	▲10	▲7	▲8	▲10	▲5	▲12	▲17
Don't know	Feb/Mar 2022	4	2	5	4	2	7	1	4	4	5	1	4	2	1	5	4	4	4	2	3	3	7	1	6	4	8	7	3

The socio-demographic data reveals that a majority of respondents are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint in most socio-demographic categories:

- This proportion is the highest among respondents who continued in education up to the age of 20 or beyond (68%), managers (71%), other white-collar workers (65%), and students (65%).
- However, only a minority of respondents who left school at age 15 or earlier (46% versus 49%), and those who have difficulty paying their bills most of the time (43% vs 52%) agree with this statement.

QA19.4 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
You are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint (% - EU)

	Total 'Agree'	Total 'Disagree'
EU27	60	36
Education (End of)		
15-	46	49
16-19	57	39
20+	68	29
Still studying	65	28
Socio-professional category		
Self-employed	63	34
Managers	71	27
Other white collars	65	31
Manual workers	56	41
House persons	49	46
Unemployed	51	45
Retired	56	39
Students	65	28
Difficulties paying bills		
Most of the time	43	52
From time to time	53	43
Almost never/ Never	63	33

Agriculture has already made a major contribution in fighting climate change

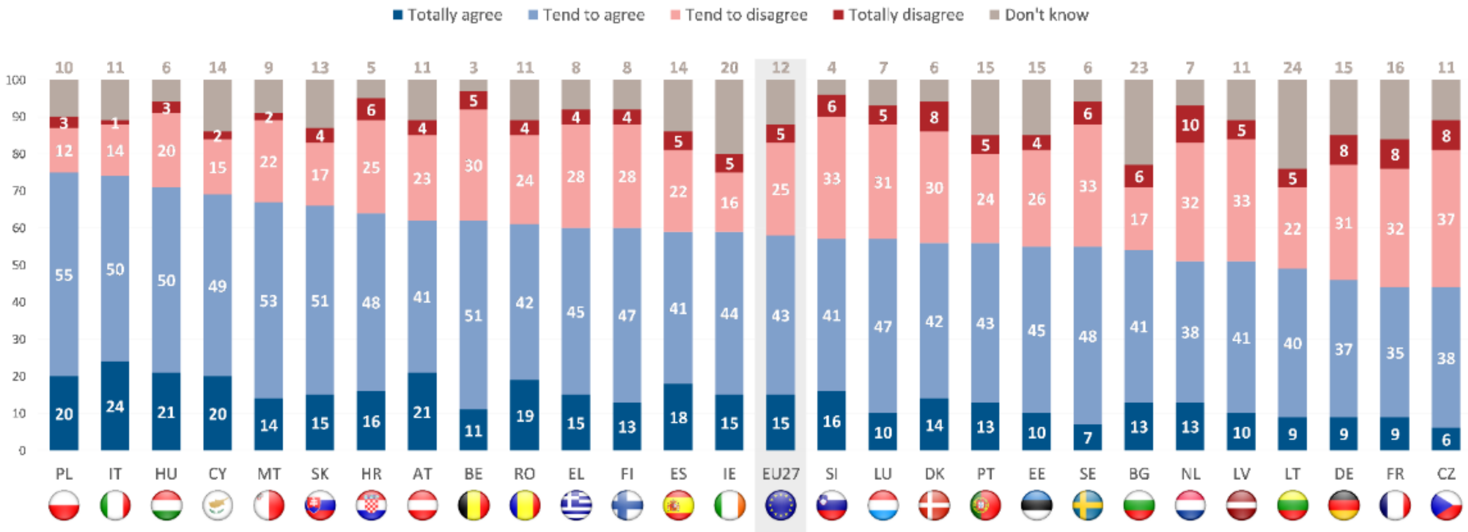
In 26 EU Member States, a majority or relative majority of respondents agree that 'agriculture has already made a major contribution in fighting climate change'. More than seven in ten respondents share this opinion in Poland (75%), Italy (74%), and Hungary (71%). The relative majority is narrower in France (44%), Germany (46%), and Lithuania (49%).

In five countries, at least one in five respondents 'totally agree' with this statement: in Italy (24%), Austria and Hungary (both 21%), and Poland and Cyprus (both 20%).

Czechia is the only country where only a minority of respondents consider that 'agriculture has already made a major contribution in fighting climate change' (44% versus 45%). Respondents in Luxembourg are evenly divided (50% versus 50%).

At least one in five respondents say they 'don't know' in Lithuania (24%), Bulgaria (23%), and Ireland (20%).

QA19.3 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
(% - Agriculture has already made a major contribution in fighting climate change)



Since 2020, the belief that agriculture has already made a major contribution in fighting climate change has gained ground in 18 EU Member States, most dramatically in Italy (74%, +14 percentage points), Croatia (64%, +14) and Belgium (62%, +10). Conversely, it has lost ground in nine countries, notably in Romania (61%, -6) and Denmark (56%, -6).

QA19.3 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
Agriculture has already made a major contribution in fighting climate change (%)

		EU27	HR	IT	BE	LV	BG	IE	ES	LU	PL	LT	SK	EL	HU	DE	EE	NL	SI	FI	MT	CZ	FR	CY	AT	PT	SE	DK	RO
Total 'Agree'	Feb/Mar 2022	58	64	74	62	51	54	59	59	57	75	49	66	60	71	46	55	51	57	60	67	44	44	69	62	56	55	56	61
	Δ Aug/Sep 2020	▲3	▲14	▲14	▲10	▲9	▲8	▲7	▲7	▲7	▲7	▲5	▲5	▲3	▲3	▲2	▲2	▲2	▲2	▲1	▼1	▼2	▼3	▼4	▼5	▼5	▼5	▼6	▼6
Total 'Disagree'	Feb/Mar 2022	30	31	15	35	38	23	21	27	36	15	27	21	32	23	39	30	42	39	32	24	45	40	17	27	29	39	38	28
	Δ Aug/Sep 2020	▼4	▼13	▼10	▼10	=	▼4	▼27	▼14	▼14	▼6	▼10	▼3	▼2	=	▼4	▼17	▼3	=	▼9	▲3	▲10	▲1	▼1	▲3	▲7	▼1	▲8	▲4
Don't know	Feb/Mar 2022	12	5	11	3	11	23	20	14	7	10	24	13	8	6	15	15	7	4	8	9	11	16	14	11	15	6	6	11

The socio-demographic data reveal that more than half of respondents in all socio-demographic categories consider that agriculture has already made a major contribution in fighting climate change:

- This proportion is the highest among respondents who left school at age 15 or earlier (61%), manual workers (61%), and house persons (61%);
- This majority is smaller among respondents aged 15-24 (55%), those who continued in education up to age 20 or beyond (53%), managers (51%), students (51%), Europeans who have difficulty paying their bills most of the time (54%), and respondents living in a large town (54%).

In addition, only a minority of respondents who consider that the EU financial support for farmers is too high agree that agriculture has already made a major contribution in fighting climate change (40%).

QA19.3 Please tell whether you agree or disagree with each of the following statements about agriculture and climate change?
Agriculture has already made a major contribution in fighting climate change (% - EU)

	Total 'Agree'	Total 'Disagree'
EU27	58	30
Age		
15-24	55	30
25-39	57	32
40-54	59	31
55 +	57	30
Education (End of)		
15-	61	21
16-19	60	27
20+	53	38
Still studying	51	35
Socio-professional category		
Self-employed	60	31
Managers	51	39
Other white collars	60	30
Manual workers	61	27
House persons	61	24
Unemployed	56	30
Retired	56	30
Students	51	35
Difficulties paying bills		
Most of the time	54	30
From time to time	60	27
Almost never/ Never	56	32
Subjective urbanisation		
Rural village	60	28
Small/ mid size town	58	30
Large town	54	33
View on EU financial support for farmers		
Too low	60	30
About right	61	29
Too high	40	52

3. Perceived level of food security

Large majorities of Europeans consider that the level of food security has stayed the same or increased compared with ten years ago, both in their country and in the EU as a whole.

Respondents were asked to say whether they think that the level of food security in the EU has increased, stayed the same, or decreased in their country and the EU as a whole[15].

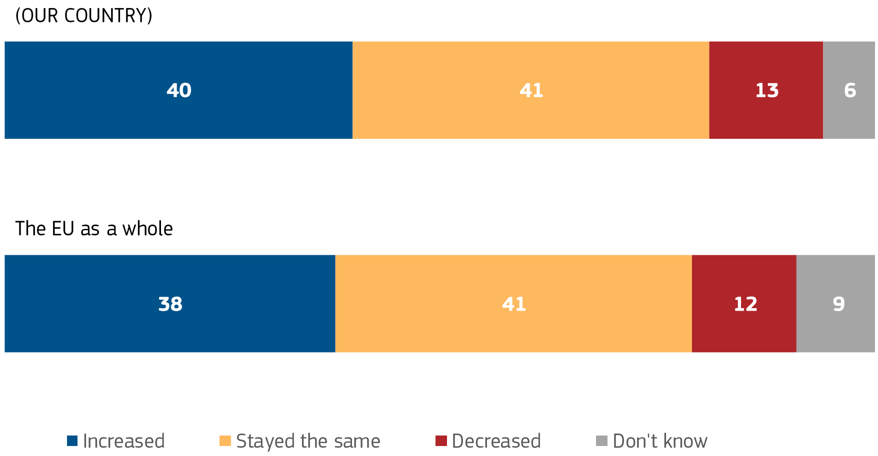
- Slightly more than four in ten respondents think that the level of food security has **'stayed the same' in their country** compared with ten years ago (41%), while a similar proportion believe that it has 'increased' (40%). However, slightly more than one in ten consider that it has 'decreased' (13%). Just 6% say they 'don't know';
- The same proportion of respondents consider that the level of food security has **'stayed the same' in the EU as a whole** compared with ten years ago (41%), while fewer than four in ten say it has 'increased' (38%). More than one in ten think that it has 'decreased' (12%), and just under one in ten (9%) answer 'don't know'.

In 11 countries, a majority or relative majority of respondents consider that the level of food security has **'stayed the same'** in their country compared with ten years ago. This is the majority view for at least half of respondents in Austria (57%), Finland (53%), and Germany, Hungary, and Croatia (all 50%).

Respondents in Slovakia (40%) mostly think that the level of food security has **'decreased'** in their country. In Bulgaria (21%), slightly more than one in five respondents say they 'don't know'.

There are significant national variations on this question, with answers on whether the level of food security has 'increased' varying between 71% in Malta and 20% in Bulgaria and Slovakia.

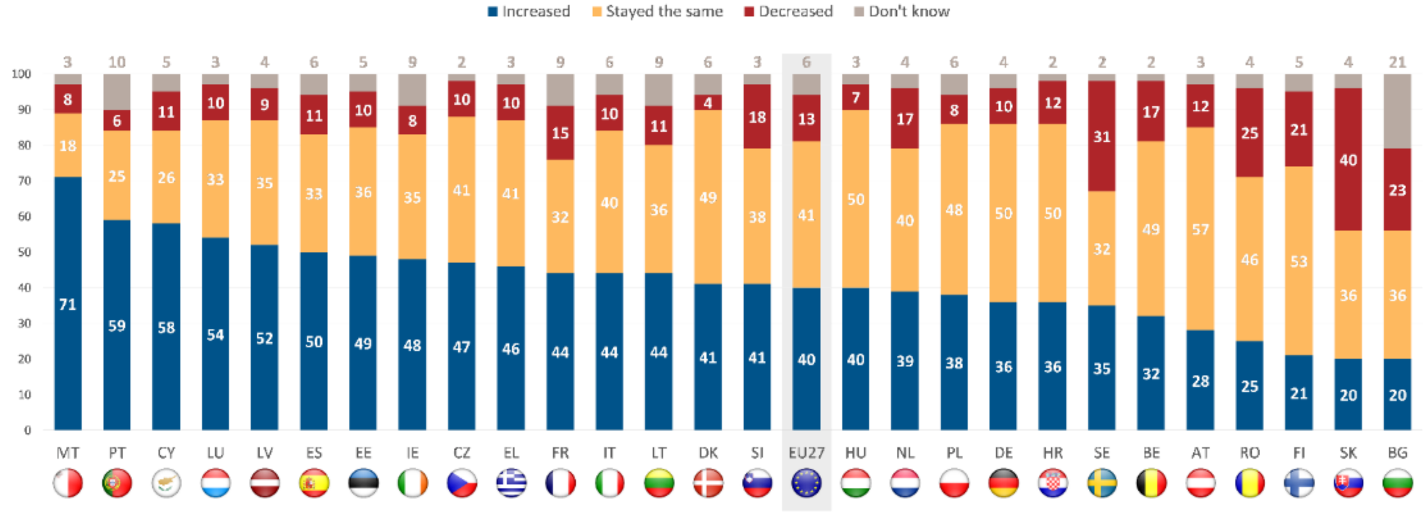
QA20 Compared with ten years ago, do you think that the level of food security in the EU has increased, stayed the same or decreased in...
(% - EU)



In 15 EU Member States, there is at least a relative majority of respondents who believe that the level of food security has **'increased' in their country** compared with ten years ago. This is the majority view for at least half of respondents in six EU Member States: Malta (71%), somewhat ahead of Portugal (59%), Cyprus (58%), Luxembourg (54%), Latvia (52%), and Spain (50%).

[15] QA20. Compared with ten years ago, do you think that the level of food security in the EU has increased, stayed the same or decreased in... 1. (OUR COUNTRY); 2. The EU as a whole

QA20.1 Compared with ten years ago, do you think that the level of food security in the EU has increased, stayed the same or decreased in...
(% - (OUR COUNTRY))



A national analysis reveals that at least a relative majority of respondents in 14 EU Member States consider that the level of food security has **'stayed the same' in the EU as a whole** compared with ten years ago. This is the majority view for at least half of respondents in four EU Member States: Austria (55%), Finland (54%), Germany (51%), and Poland (50%).

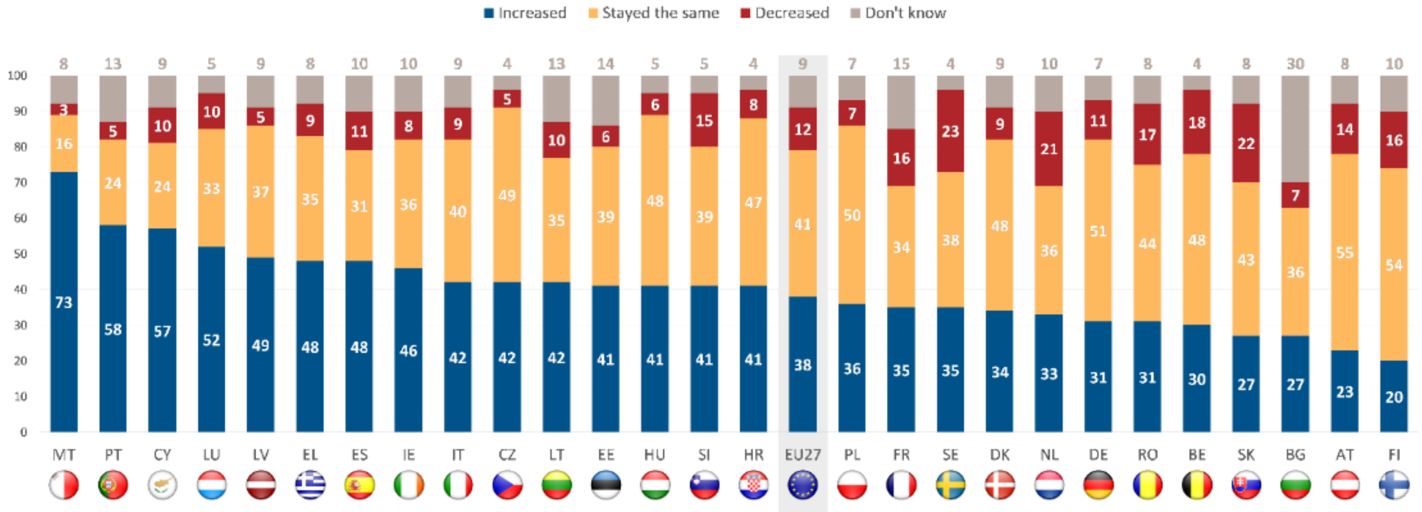
In 13 EU Member States, the belief that the level of food security has **'increased'** in the EU as a whole compared with ten years ago is the predominant view, and the majority view in Malta (73%), well ahead of Portugal (58%), Cyprus (57%), and Luxembourg (52%).

Minorities of more than one in five respondents think that the level of food security has **'decreased'** in the EU as a whole in Sweden (23%), Slovakia (22%), and the Netherlands (21%).

Three in ten respondents in Bulgaria (30%) answer 'don't know'.

There are significant national variations here too, with the numbers answering 'increased' varying between 73% in Malta and 20% in Finland.

QA20.2 Compared with ten years ago, do you think that the level of food security in the EU has increased, stayed the same or decreased in...
(% - The EU as a whole)



The socio-demographic data reveal that majorities of respondents consider that the level of food security has either **'stayed the same' or 'increased' in their country** compared with ten years ago in all socio-demographic categories:

- The belief that it has 'stayed the same' is at its highest among other white-collar workers (44%) and respondents who have difficulties paying their bills from time to time (45%);
- The view that food security has increased in their country is most widespread among self-employed people (46%).

The data show that a majority in most socio-demographic categories thinks that the level of food security has **'stayed the same' in the EU as a whole** compared with ten years ago:

- This view sees its highest levels among respondents aged 55 and over (44%), those who left school between the ages 16-19 (44%), manual workers (44%) and retired people (44%);
- However, respondents aged 15-24 (42% vs 34%), self-employed people (44% vs 37%), and students (41% vs 34%), are more likely to consider that the level of food security has 'increased' in the EU as a whole rather than 'stayed the same'.

QA20 Compared with ten years ago, do you think that the level of food security in the EU has increased, stayed the same or decreased in...
(% - EU)

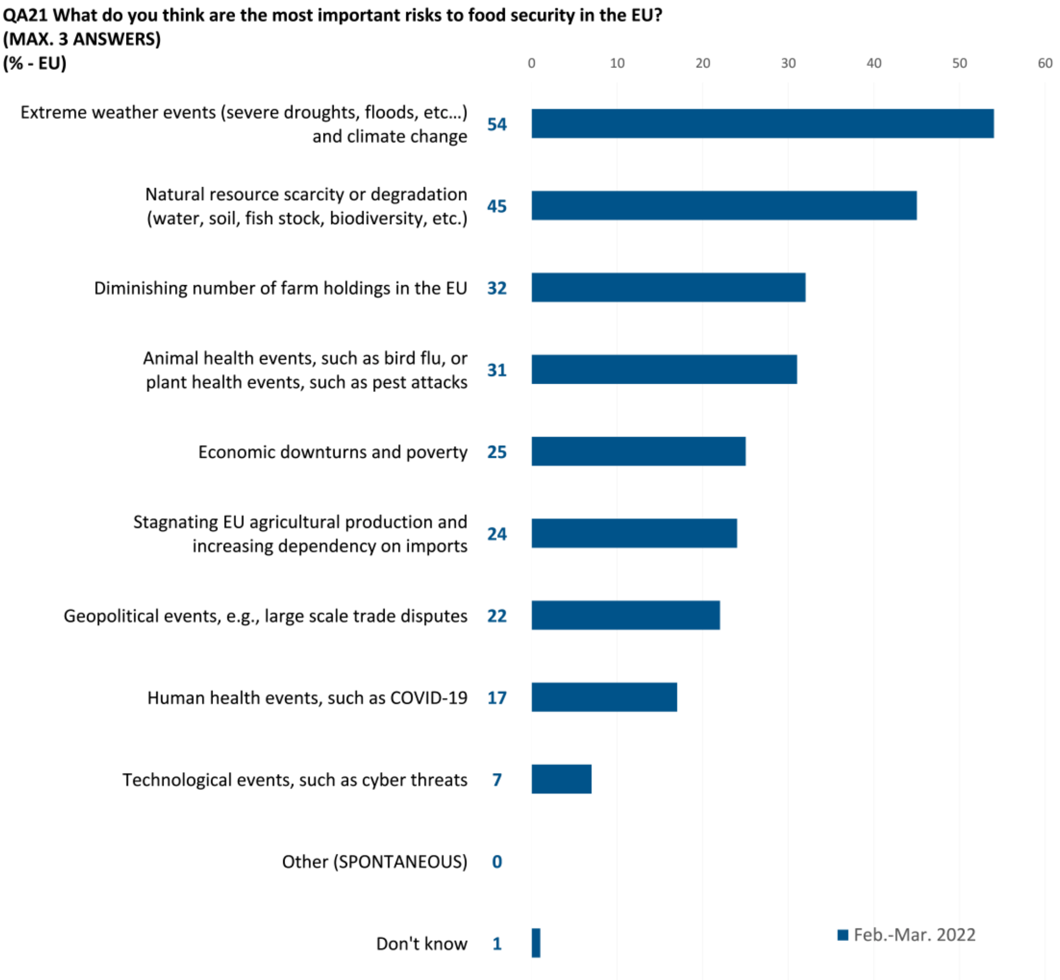
	The EU as a whole				(OUR COUNTRY)			
	Increased	Stayed the same	Decreased	Don't know	Increased	Stayed the same	Decreased	Don't know
EU27	38	41	12	9	40	41	13	6
Gender								
Man	38	42	12	8	40	42	13	5
Woman	37	41	12	10	41	40	13	6
Age								
15-24	42	34	12	12	43	35	12	10
25-39	38	41	13	8	40	40	15	5
40-54	38	42	13	7	41	42	13	4
55 +	35	44	11	10	40	43	12	5
Education (End of)								
15-	34	42	11	13	37	43	12	8
16-19	37	44	11	8	40	43	13	4
20+	39	41	12	8	43	40	13	4
Still studying	41	34	12	13	43	35	11	11
Socio-professional category								
Self-employed	44	37	13	6	46	35	15	4
Managers	41	42	11	6	43	41	12	4
Other white collars	38	43	12	7	39	44	13	4
Manual workers	36	44	13	7	39	43	13	5
House persons	36	38	14	12	40	37	16	7
Unemployed	36	37	15	12	38	42	15	5
Retired	34	44	10	12	39	43	12	6
Students	41	34	12	13	43	35	11	11
Difficulties paying bills								
Most of the time	32	38	17	13	35	38	19	8
From time to time	34	43	14	9	35	45	15	5
Almost never/ Never	39	41	11	9	43	40	12	5

4. Perception of risks related to food security in the EU

More than half of Europeans consider that extreme weather events and climate change are the most important risks to food security in the EU

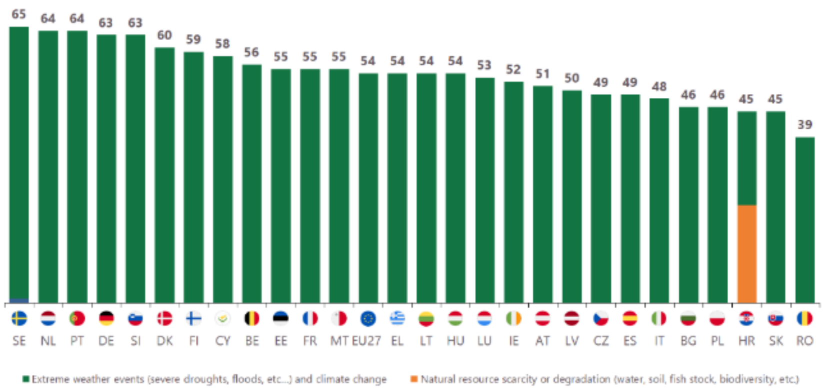
Respondents were asked to identify the most important risks to food security in the EU[16] by choosing up to three items from a list of nine. They place extreme weather events and climate change and, to a lesser extent, natural resource scarcity or degradation at the top of the ranking, well ahead of other factors:

- More than half of Europeans cite **'extreme weather events (severe droughts, floods, etc.) and climate change'** (54%) among the most important risks to food security in the EU;
- **'Natural resource scarcity or degradation (water, soil, fish stock, biodiversity, etc.)'** (45%) is cited by more than four in ten respondents;
- Nearly a third mention **'diminishing number of farm holdings in the EU'** (32%) and **'animal health events, such as bird flu, or plant health events, such as pest attacks'** (31%);
- A quarter of respondents think that **'economic downturns and poverty'** (25%) is one of the most important risks to food security in the EU, slightly ahead of **'stagnating EU agricultural production and increasing dependency on imports'** (24%), and **'geopolitical events, e.g., large scale trade disputes'** (22%);
- Nearly one in five Europeans mention **'human health events, such as COVID-19'** (17%);
- Less than one in ten respondents consider that **'technological events, such as cyber threats'** (7%) are among the three most important risks to food security in the EU.



[16] QA21. What do you think are the most important risks to food security in the EU? (MAX. 3 ANSWERS)

QA21. What do you think are the most important risks to food security in the EU? (MAX. 3 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)



A national analysis reveals that, in all 27 EU Member States, 'extreme weather events (severe droughts, floods, etc.) and climate change' is the most frequent response. More than six in ten respondents in Sweden (65%), Portugal and the Netherlands (both 64%), and Germany and Slovenia (both 63%) mention it as one of the most important risks to food security in the EU. A smaller proportion of respondents share this opinion in Romania (39%), and Slovakia and Croatia (both 45%).

'Natural resource scarcity or degradation (water, soil, fish stock, biodiversity, etc.)' comes in equal first position with 'extreme weather events and climate change' in Slovakia (45% for both). Moreover, at least half of respondents cite this factor in six EU Member States: Portugal (56%), France (54%), the Netherlands (53%), Germany (52%), Malta (51%), and Denmark (50%). At the other end of the scale, fewer than a third of respondents in Romania (23%), Ireland (29%), Latvia (30%), and Bulgaria and Finland (both 32%) think that 'natural resource scarcity or degradation' is one of the most important risks to food security in the EU.

None of the seven remaining factors ranks first in any EU Member State as the most important risks to food security in the EU. However:

- **Diminishing number of farm holdings in the EU** is cited by at least a quarter of respondents in 23 EU Member States, and by at least four in ten in Finland (55%), Sweden (42%), and Germany (40%);
- More than a quarter of respondents mention **animal health events, such as bird flu, or plant health events, such as pest attacks** in 23 EU Member States, and more than four in ten in the Netherlands (47%) and Hungary (43%);
- At least a quarter of respondents cite **economic downturns and poverty** in 18 EU Member States, with the highest level in Greece (47%), significantly ahead of Cyprus and Croatia (both 38%);
- At least a quarter of respondents mention **stagnating EU agricultural production and increasing dependency on imports** in 14 EU Member States, and more than a third in Greece (41%), Czechia (38%), and Sweden (36%);
- **Geopolitical events, e.g. large scale trade disputes** is cited by at least a quarter of respondents in nine EU Member States, and by more than three in ten in the Netherlands (39%), Sweden (33%), and Finland, Denmark and Estonia (all 32%);
- More than a quarter of respondents mention **human health events, such as COVID-19** in Ireland and Bulgaria (both 30%), and Cyprus (26%);
- **Technological events, such as cyber threats** scores highest in Italy and Poland (both 12%), and Romania, Austria and Hungary (all 10%).

QA21 What do you think are the most important risks to food security in the EU? (MAX. 3 ANSWERS)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Extreme weather events (severe droughts, floods, etc...) and climate change	54	56	46	49	60	63	55	52	54	49	55	45	48	58	50	54	53	54	55	64	51	46	64	39	63	45	59	65
Natural resource scarcity or degradation (water, soil, fish stock, biodiversity, etc.)	45	46	32	44	50	52	36	29	38	45	54	45	40	35	30	36	47	41	51	53	45	42	56	23	38	36	32	49
Diminishing number of farm holdings in the EU	32	39	29	33	17	40	34	29	35	23	39	18	25	26	37	27	37	19	27	25	39	28	17	30	33	35	55	42
Animal health events, such as bird flu, or plant health events, such as pest attacks	31	23	32	28	32	30	37	34	33	28	31	29	34	31	29	37	33	43	39	47	26	33	35	26	24	28	19	20
Economic downturns and poverty	25	23	34	23	20	17	31	27	47	26	25	38	31	38	37	32	19	28	28	16	20	23	28	32	36	31	27	18
Stagnating EU agricultural production and increasing dependency on imports	24	27	27	38	25	23	22	22	41	24	15	33	29	31	17	12	24	20	25	21	29	20	19	21	29	32	26	36
Geopolitical events, e.g., large scale trade disputes	22	27	14	23	32	24	32	23	16	22	22	21	18	12	28	25	26	12	19	39	23	19	10	20	24	19	32	33
Human health events, such as COVID-19	17	16	30	15	13	14	19	30	15	17	16	20	22	26	23	14	13	21	17	8	21	18	12	22	11	14	10	7
Technological events, such as cyber threats	7	7	7	4	8	5	5	9	5	6	6	8	12	6	7	8	7	10	7	5	10	12	3	10	5	8	2	5
Other (SPONTANEOUS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	0	0	0	0	0
Don't know	1	0	3	0	2	0	1	1	0	2	2	0	3	1	1	1	0	1	1	0	1	2	4	1	0	1	1	0

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

The socio-demographic data reveal that the main perceived risk to food security in the EU across all socio-demographic categories is 'extreme weather events (severe droughts, floods, etc.) and climate change':

- It is cited most by respondents who continued in education up to age 20 or beyond (56%), managers (58%), retired people (56%), and Europeans who never or almost never have difficulties paying their bills (56%).
- However, manual workers (51%) and respondents who have difficulty paying their bills from time to time (47%), or most of the time (49%), are the least likely to mention this.

QA21 What do you think are the most important risks to food security in the EU? (MAX. 3 ANSWERS)
(% - EU)

	Diminishing number of farm holdings in the EU	Stagnating EU agricultural production and increasing dependency on imports	Extreme weather events (severe droughts, floods, etc...) and climate change	Natural resource scarcity or degradation (water, soil, fish stock, biodiversity, etc.)	Animal health events, such as bird flu, or plant health events, such as pest attacks	Human health events, such as COVID-19	Economic downturns and poverty	Geopolitical events, e.g., large scale trade dispu	Technological events, such as cyber threats
EU27	32	24	54	45	31	17	25	22	7
Education (End of)									
15-	30	20	54	40	31	18	28	15	7
16-19	33	23	52	44	32	18	26	19	8
20+	33	28	56	49	30	14	21	29	7
Still studying	27	21	52	50	31	18	26	26	8
Socio-professional category									
Self-employed	35	31	53	45	28	13	23	24	8
Managers	33	27	58	51	30	13	18	29	7
Other white collars	31	28	52	48	30	17	25	22	9
Manual workers	33	23	51	42	31	19	27	21	8
House persons	25	21	53	41	32	20	29	17	9
Unemployed	32	21	54	44	30	19	28	16	9
Retired	35	22	56	44	32	16	25	20	6
Students	27	21	52	50	31	18	26	26	8
Difficulties paying bills									
Most of the time	30	25	49	42	29	20	28	18	9
From time to time	30	25	47	40	29	22	30	21	10
Almost never/ Never	33	23	56	47	32	15	23	23	7

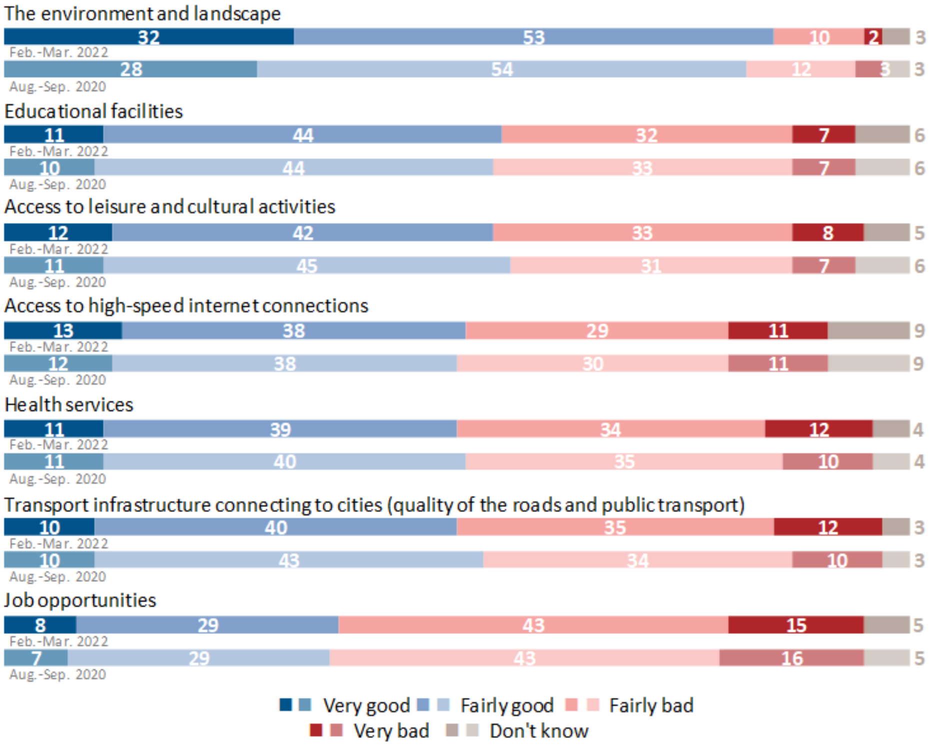
5. The situation of rural areas, and how things have changed over the past ten years

At least half of Europeans believe that services and infrastructures are good in rural areas in their country, except for job opportunities

When asked to rate seven services and infrastructures in rural areas in their country[17], respondents give the following responses:

- More than eight in ten Europeans (85%, +3 percentage points since 2020) believe that **'the environment and landscape'** are good in rural areas in their country, with close to a third (32%, +4) responding 'very good'. However, almost one in eight (12%, -3) say the environment and landscape are bad in rural areas in their country;
- More than half of respondents consider that three other aspects are good in rural areas in their country. This is the case with **'educational facilities'** (55%, +1 percentage point, versus 39% total 'bad', -1), **'access to leisure and cultural activities'** (54%, -2, vs 41%, +3), and **'access to high-speed internet connections'** (51%, +1, vs 40%, -1);
- Half of Europeans hold this view about **'health services'** (50%, -1 percentage points, vs 46%, +1) and **'transport infrastructure connecting to cities (quality of the roads and public transport)'** (50%, -3, vs 47%, +3);
- However, only a minority of respondents (37%, +1 percentage point) consider that **'job opportunities'** are good in rural areas in their country, including fewer than one in ten (8%, +1) who respond 'very good'. Meanwhile, almost six in ten respondents (58%, -1) rate job opportunities in rural areas in their country as 'bad', with 15% (-1) responding 'very bad'.

QA18 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - EU)



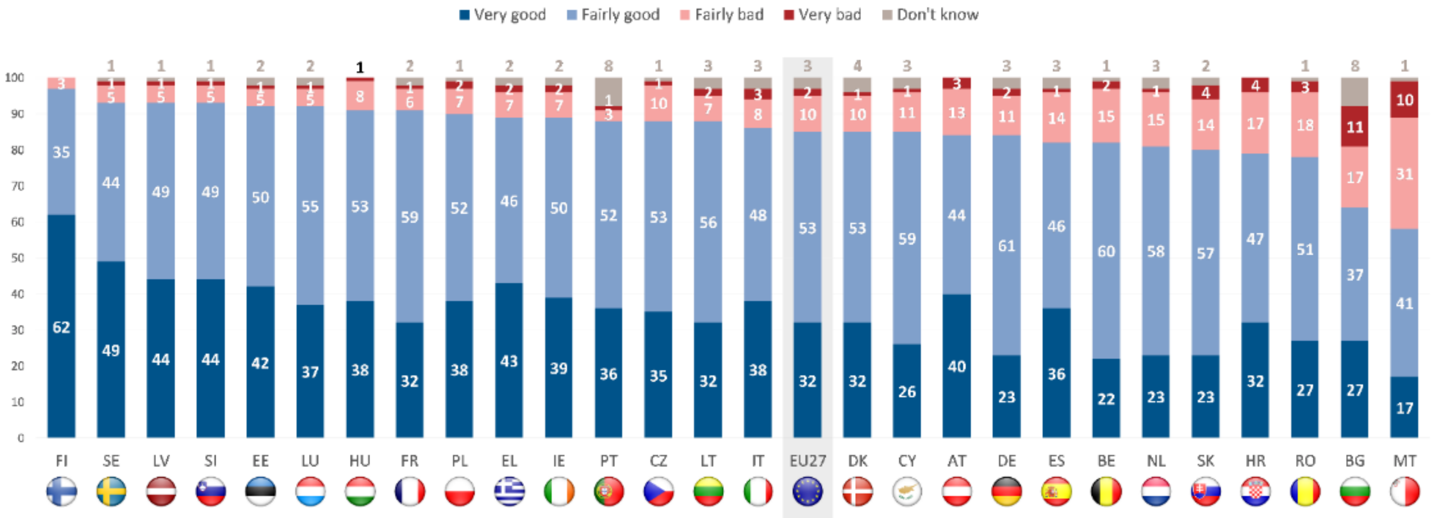
[17] QA18. Overall, how would you rate the following in rural areas in (OUR COUNTRY)? 1. Job opportunities; 2. Educational facilities; 3. Health services; 4. Access to high-speed internet connections; 5. Access to leisure and cultural activities; 6. The environment and landscape; 7. Transport infrastructure connecting to cities (quality of the roads and public transport)

The environment and landscape

In all 27 EU Member States, more than half of respondents believe that the environment and landscape are good in rural areas in their country, with the highest levels of satisfaction in Finland (97%), and Sweden, Slovenia and Latvia (all 93%), and the lowest in Malta (58%), Bulgaria (64%), and Romania (78%).

More than one in five respondents rate the environment and landscape as 'very good' in rural areas in 26 EU Member States, with the highest numbers in Finland (62%), significantly ahead of Sweden (49%), and Latvia and Slovenia (both 44%).

QA18.6 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - The environment and landscape)



Since 2020, the share of respondents who consider that the environment and landscape are good in rural areas in their country has increased in 18 EU Member States, most notably in Slovakia (80%, +13 percentage points), Greece (89%, +12), Italy (86%, +10), and Romania (78%, +10). Meanwhile, it has decreased slightly in eight countries, notably in Ireland (89%, -4). The belief is unchanged in Sweden.

QA18.6 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
The environment and landscape (%)

		EU27	SK	EL	IT	RO	FR	PL	PT	BG	HR	CY	HU	FI	CZ	BE	SI	LT	LU	LV	SE	ES	NL	EE	MT	DK	DE	AT	IE
Total 'Good'	Feb/Mar 2022	85	80	89	86	78	91	90	88	64	79	85	91	97	88	82	93	88	92	93	93	82	81	92	58	85	84	84	89
	Δ Aug/Sep 2020	▲3	▲13	▲12	▲10	▲10	▲7	▲6	▲6	▲5	▲5	▲5	▲5	▲5	▲4	▲3	▲3	▲2	▲2	▲1	=	▼1	▼1	▼2	▼2	▼3	▼3	▼3	▼4
Total 'Bad'	Feb/Mar 2022	12	18	9	11	21	7	9	4	28	21	12	9	3	11	17	6	9	6	6	6	15	16	6	41	11	13	16	9
	Δ Aug/Sep 2020	▼3	▼12	▼12	▼7	▼8	▼5	▼4	▼8	▼3	▼4	▼4	▼4	▼5	▼4	▼3	▼3	▼2	▼4	=	▼1	▼1	=	=	▲3	▲3	▲3	▲3	▲2
Don't know	Feb/Mar 2022	3	2	2	3	1	2	1	8	8	0	3	0	0	1	1	1	3	2	1	1	3	3	2	1	4	3	0	2

Educational facilities

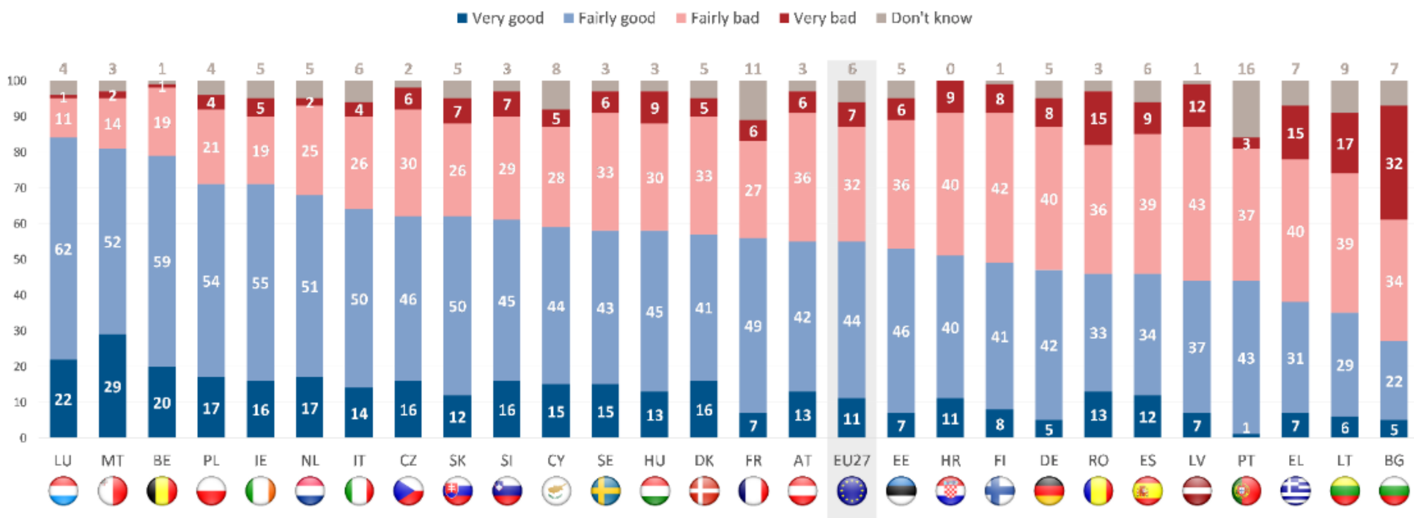
A majority or relative majority of respondents consider that educational facilities are good in rural areas in their country in 19 EU Member States. More than three-quarters of respondents hold this view in Luxembourg (84%), Malta (81%), and Belgium (79%), while the majority or relative majority is smaller in Portugal (44% versus 40%), Croatia (51% vs 49%), and Estonia (53% vs 42%).

At least one in five respondents rate educational facilities as ‘very good’ in rural areas in Malta (29%), Luxembourg (22%), and Belgium (20%).

Conversely, in eight EU Member States, the belief that educational facilities are good in rural areas is the minority view. Fewer than four in ten respondents share this opinion in Bulgaria (27% vs 66%), Lithuania (35% vs 56%), and Greece (38% vs 55%).

Close to a third of respondents in Bulgaria (32%) say that educational facilities are ‘very bad’ in rural areas in their country.

QA18.2 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - Educational facilities)



Since 2020, the share of respondents who believe that educational facilities are good in rural areas in their country has risen in 15 EU Member States, most strikingly in Malta (81%, +21 percentage points) and Italy (64%, +15). Meanwhile, it has fallen in ten countries, most notably in Austria (55%, -12). The belief is unchanged in Luxembourg and Lithuania.

QA18.2 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
Educational facilities (%)

		EU27	MT	IT	PT	DK	CZ	PL	BG	EL	ES	HR	CY	RO	FI	FR	SK	LT	LU	BE	LV	SI	SE	HU	NL	EE	IE	DE	AT
Total 'Good'	Feb/Mar 2022	55	81	64	44	57	62	71	27	38	46	51	59	46	49	56	62	35	84	79	44	61	58	58	68	53	71	47	55
	Δ Aug/Sep 2020	▲1	▲21	▲15	▲9	▲7	▲5	▲5	▲4	▲3	▲3	▲3	▲3	▲3	▲2	▲1	▲1	=	=	▼2	▼2	▼2	▼3	▼4	▼5	▼7	▼7	▼9	▼12
Total 'Bad'	Feb/Mar 2022	39	16	30	40	38	36	25	66	55	48	49	33	51	50	33	33	56	12	20	55	36	39	39	27	42	24	48	42
	Δ Aug/Sep 2020	▼1	▼13	▼12	▼12	▼7	=	▼2	▼3	▲1	▼5	▼1	=	▼2	▼3	=	=	▲1	▼4	▲3	▲8	▲2	▲1	▲6	▲2	▲2	▲2	▲9	▲11
Don't know	Feb/Mar 2022	6	3	6	16	5	2	4	7	7	6	0	8	3	1	11	5	9	4	1	1	3	3	3	5	5	5	5	3

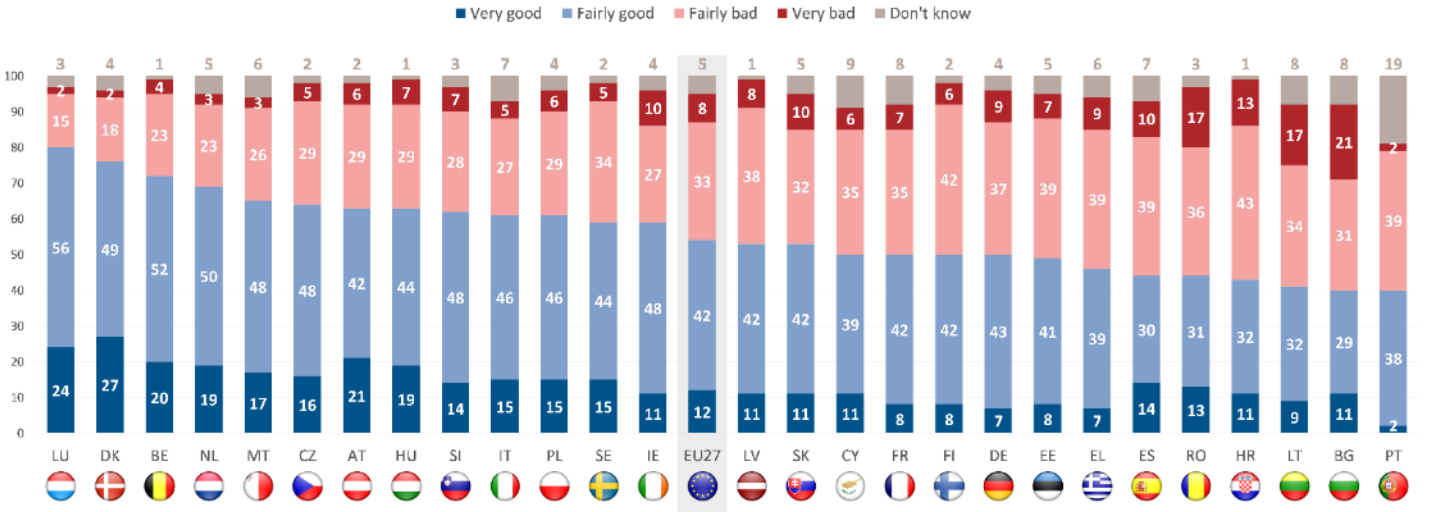
Access to leisure and cultural activities

In 20 EU Member States, a majority or relative majority of respondents think that access to leisure and cultural activities is good in rural areas in their country, with more than seven in ten respondents holding this view in Luxembourg (80%), Denmark (76%), and Belgium (72%). The relative majority is narrow in Estonia (49% versus 46%), Finland (50% vs 48%), Germany (50% vs 46%), France (50% vs 42%), and Cyprus (50% vs 41%).

At least one in five respondents say access is 'very good' in Denmark (27%), Luxembourg (24%), Austria (21%) and Belgium (20%). Conversely, in seven EU Member States, only a minority of respondents believe that access to leisure and cultural activities is good in rural areas in their country: in Bulgaria (40% versus 52%), Portugal (40% vs 41%), Lithuania (41% vs 51%), Croatia (43% vs 56%), Romania (44% vs 53%), Spain (44% vs 49%), and Greece (46% vs 48%).

In Bulgaria (21%), slightly more than one in five respondents rate access to leisure and cultural activities as good in rural areas in their country.

QA18.5 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - Access to leisure and cultural activities)



Since 2020, the proportion of respondents who believe that access to leisure and cultural activities is good in rural areas in their country has fallen in 21 EU Member States, most dramatically in Latvia (53%, -15 percentage points), Cyprus (50%, -15), Austria (63%, -11), and Slovakia (53%, -11). It has risen in four countries, particularly in Malta (65%, +10) and is unchanged in Finland and Spain.

QA18.5 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
Access to leisure and cultural activities (%)

		EU27	MT	IT	DK	CZ	ES	FI	EL	BE	PL	SE	BG	IE	HR	RO	SI	EE	LT	LU	NL	PT	FR	HU	DE	AT	SK	CY	LV
Total 'Good'	Feb/Mar 2022	54	65	61	76	64	44	50	46	72	61	59	40	59	43	44	62	49	41	80	69	40	50	63	50	63	53	50	53
	Δ Aug/Sep 2020	▼2	▲10	▲4	▲3	▲1	=	=	▼1	▼2	▼2	▼2	▼3	▼3	▼3	▼3	▼3	▼4	▼4	▼4	▼4	▼4	▼6	▼6	▼8	▼11	▼11	▼15	▼15
Total 'Bad'	Feb/Mar 2022	41	29	32	20	34	49	48	48	27	35	39	52	37	56	53	35	46	51	17	26	41	42	36	46	35	42	41	46
	Δ Aug/Sep 2020	▲3	▼4	▼1	▼2	▲3	▼4	▼2	▲3	▲3	▲4	=	▲6	▼1	▲4	▲5	▲3	▼1	▲4	▲1	▲2	▼1	▲5	▲8	▲8	▲10	▲12	▲14	▲20
Don't know	Feb/Mar 2022	5	6	7	4	2	7	2	6	1	4	2	8	4	1	3	3	5	8	3	5	19	8	1	4	2	5	9	1

Access to high-speed internet connections

A majority or relative majority of respondents in 21 EU Member States consider that access to high-speed internet connections is good in rural areas in their country, with the highest numbers in Luxembourg (81%), and Hungary and Belgium (both 79%). The relative majority is narrower in Bulgaria (44% versus 37%), Greece (48% vs 35%), and Estonia (54% vs 38%).

In 11 countries, more than one in five respondents rate access to high-speed internet connections as 'very good' in rural areas, including more than a quarter in Luxembourg (29%), and Hungary and the Netherlands (both 27%).

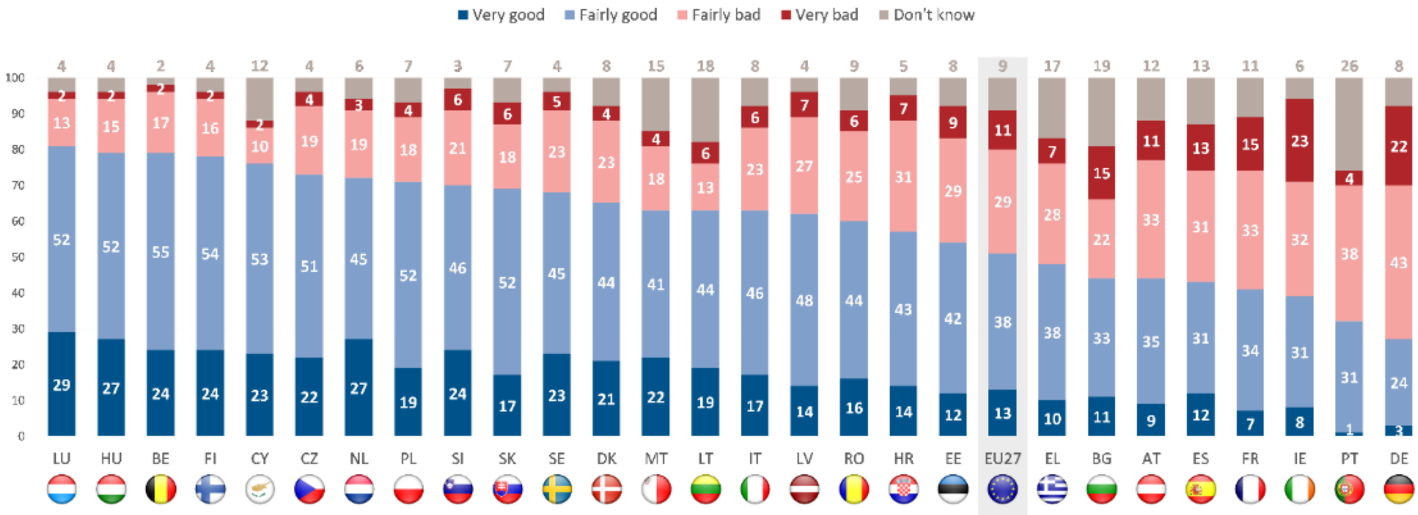
In five EU Member States, only a minority of respondents believe that high-speed internet access is good: Germany (27% versus 65%), Portugal (32% vs 42%), Ireland (39% vs 55%), France (41% vs 48%) and Spain (43% vs 44%).

More than one in five respondents consider access to be 'very bad' in Ireland (23%) and Germany (22%). Respondents in Austria are evenly divided (44% versus 44%).

More than a quarter of respondents in Portugal (26%) say they 'don't know'.

In 16 EU Member States, the belief that access to high-speed internet connections is good in rural areas in their country has lost ground since 2020, most notably in Austria (44%, -15 percentage points). Conversely, it has gained ground in nine countries, notably in Denmark (65%, +14). It is unchanged in Croatia and France.

QA18.4 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - Access to high-speed internet connections)



QA18.4 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
Access to high-speed internet connections (%)

		EU27	DK	IT	CY	ES	CZ	BE	LV	PL	RO	FR	HR	HU	LU	MT	IE	LT	PT	FI	DE	NL	SI	SK	SE	EL	BG	EE	AT
Total 'Good'	Feb/Mar 2022	51	65	63	76	43	73	79	62	71	60	41	57	79	81	63	39	63	32	78	27	72	70	69	68	48	44	54	44
	Δ Aug/Sep 2020	▲1	▲14	▲7	▲7	▲5	▲4	▲3	▲3	▲2	▲2	=	=	▼1	▼2	▼2	▼3	▼3	▼3	▼3	▼4	▼4	▼4	▼4	▼4	▼5	▼6	▼7	▼15
Total 'Bad'	Feb/Mar 2022	40	27	29	12	44	23	19	34	22	31	48	38	17	15	22	55	19	42	18	65	22	27	24	28	35	37	38	44
	Δ Aug/Sep 2020	▼1	▼12	▼3	▼6	▼11	▲4	▼2	▲7	=	▼2	▼1	▲2	▲4	▼2	▲10	▼3	▲3	▼3	▼1	▲2	▲3	▲6	▲5	▲1	▲2	▲10	▼1	▲11
Don't know	Feb/Mar 2022	9	8	8	12	13	4	2	4	7	9	11	5	4	4	15	6	18	26	4	8	6	3	7	4	17	19	8	12

Health services

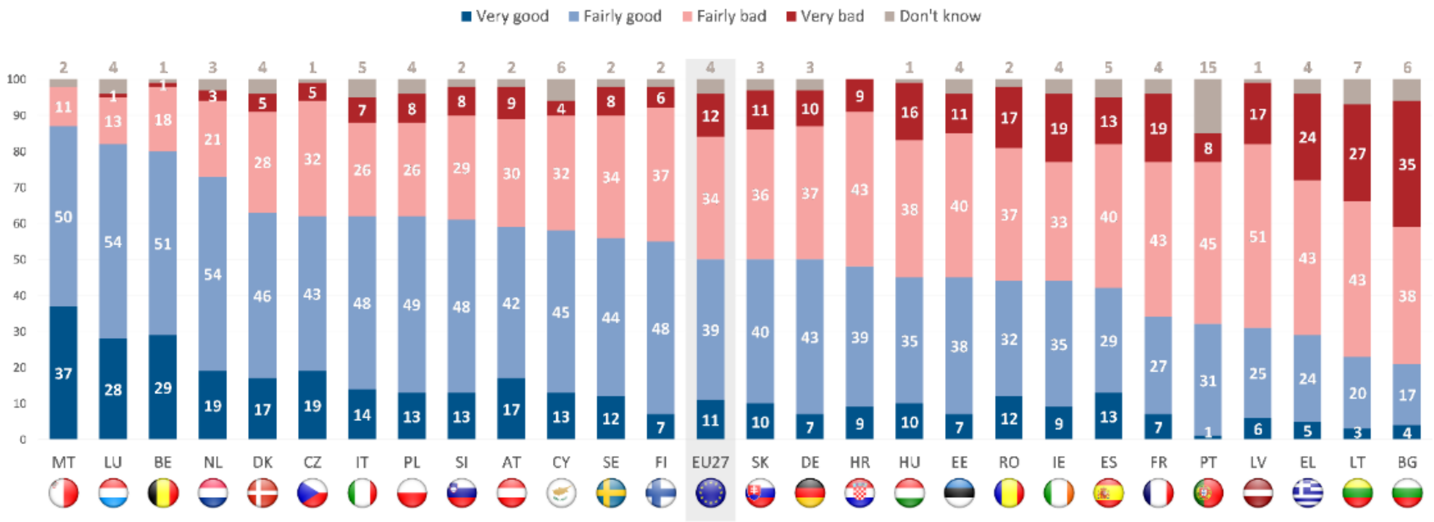
A majority or relative majority of respondents in 15 EU Member States believe that health services are good in rural areas in their country, including at least eight in ten respondents in Malta (87%), Luxembourg (82%) and Belgium (80%). These beliefs have narrower relative majorities in Germany and Slovakia (both 50%), and Finland (55%).

More than one in five respondents rate health services as 'very good' in rural areas in their country: Malta (37%), Belgium (29%), and Luxembourg (28%).

However, only a minority of respondents think that health services are good in 12 EU Member States, and fewer than three in ten in Bulgaria (21% versus 73%), Lithuania (23% vs 70%), and Greece (29% vs 67%).

More than one in five respondents say that these services are 'very bad' in Bulgaria (35%), Lithuania (27%), and Greece (24%).

QA18.3 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - Health services)



Since 2020, the belief that health services are good in rural areas in their country has increased in 14 EU Member States, particularly in Malta (87%, +21 percentage points). Meanwhile, it has decreased in 12 countries, most notably in Austria (59%, -11), Ireland (44%, -10), and France (34%, -10). It is unchanged in Latvia.

QA18.3 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
Health services (%)

		EU27	MT	PL	IT	DK	EE	EL	BG	HR	CZ	PT	RO	HU	SI	SK	LV	BE	LU	CY	LT	FI	ES	SE	DE	NL	IE	FR	AT
Total 'Good'	Feb/Mar 2022	50	87	62	62	63	45	29	21	48	62	32	44	45	61	50	31	80	82	58	23	55	42	56	50	73	44	34	59
	Δ Aug/Sep 2020	▼1	▲21	▲9	▲8	▲7	▲5	▲4	▲3	▲3	▲2	▲2	▲2	▲1	▲1	▲1	=	▼1	▼1	▼2	▼2	▼3	▼4	▼5	▼8	▼9	▼10	▼10	▼11
Total 'Bad'	Feb/Mar 2022	46	11	34	33	33	51	67	73	52	37	53	54	54	37	47	68	19	14	36	70	43	53	42	47	24	52	62	39
	Δ Aug/Sep 2020	▲1	▼17	▼6	▼5	▼7	▼9	▼2	▼3	▼2	▲1	▼7	▼1	=	▼1	▼1	▲3	▲2	▼3	▲4	▲1	▲1	▲1	▲3	▲7	▲9	▲6	▲11	▲10
Don't know	Feb/Mar 2022	4	2	4	5	4	4	4	6	0	1	15	2	1	2	3	1	1	4	6	7	2	5	2	3	3	4	4	2

Transport infrastructure connecting to cities (quality of the roads and public transport)

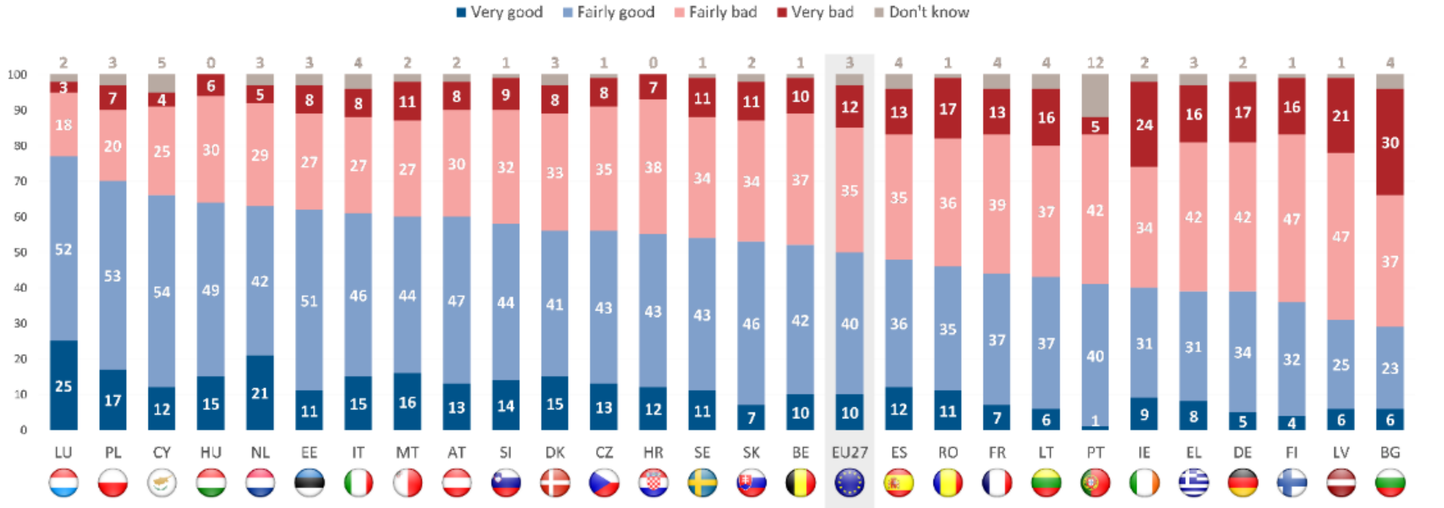
In 16 EU Member States, a majority of respondents think that transport infrastructure connecting to cities is good in rural areas in their country. At least two-thirds of respondents share this opinion in Luxembourg (77%), Poland (70%) and Cyprus (66%). This majority is narrower in Belgium (52% vs 47%), Slovakia (53% vs 45%) and Sweden (54% vs 45%).

More than one in five respondents rate transport infrastructure as 'very good' in Luxembourg (25%) and the Netherlands (21%). However, only a minority of respondents say transport infrastructure connecting to cities is good in ten EU Member States, with the lowest satisfaction in Bulgaria (29% vs 67%), Latvia (31% vs 68%), and Finland (36% vs 63%).

More than one in five respondents consider that transport infrastructure is 'very bad' in Bulgaria (30%), Ireland (24%), and Latvia (21%).

Respondents in Spain are divided (48% vs 48%).

QA18.7 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - Transport infrastructure connecting to cities (quality of the roads and public transport))



Since 2020, the belief that transport infrastructure connecting to cities is good in rural areas in their country has lost ground in 17 EU Member States, most dramatically in Germany (39%, -13 percentage points), Austria (60%, -11) and Latvia (31%, -11). Conversely, it has gained ground in nine countries, notably in Luxembourg (77%, +12). It is unchanged in Estonia.

QA18.7 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
Transport infrastructure connecting to cities (quality of the roads and public transport) (%)

		EU27	LU	IT	SK	DK	MT	PT	HU	PL	RO	EE	BE	CZ	ES	SE	FR	BG	HR	LT	SI	FI	CY	NL	IE	EL	LV	AT	DE
Total 'Good'	Feb/Mar 2022	50	77	61	53	56	60	41	64	70	46	62	52	56	48	54	44	29	55	43	58	36	66	63	40	39	31	60	39
	Δ Aug/Sep 2020	▼3	▲12	▲7	▲7	▲6	▲6	▲4	▲3	▲3	▲2	=	▼1	▼1	▼1	▼1	▼3	▼4	▼5	▼5	▼6	▼6	▼7	▼7	▼9	▼9	▼11	▼11	▼13
Total 'Bad'	Feb/Mar 2022	47	21	35	45	41	38	47	36	27	53	35	47	43	48	45	52	67	45	53	41	63	29	34	58	58	68	38	59
	Δ Aug/Sep 2020	▲3	▼14	▼5	▼6	▼5	=	▼7	▼2	▼2	=	▼3	▲1	▲2	▼2	=	▲5	▲5	▲6	▲6	▲6	▲5	▲6	▲7	▲7	▲9	▲13	▲10	▲12
Don't know	Feb/Mar 2022	3	2	4	2	3	2	12	0	3	1	3	1	1	4	1	4	4	0	4	1	1	5	3	2	3	1	2	2

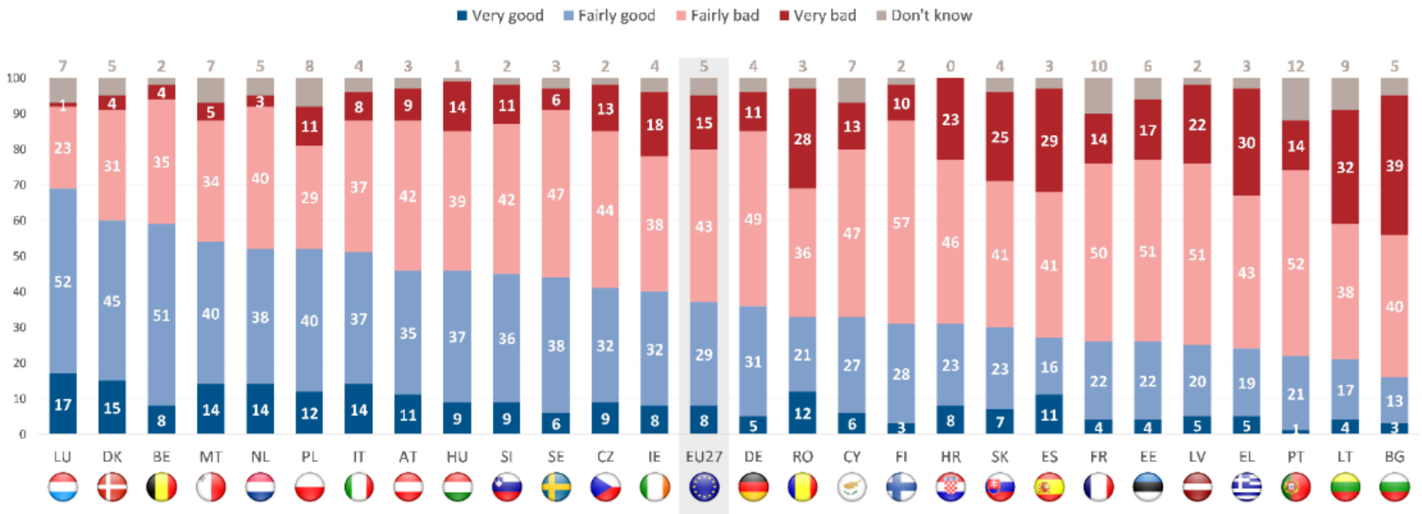
Job opportunities

A national analysis reveals that, in 20 EU Member States, only a minority of respondents believe that job opportunities are good in rural areas in their country. Less than a quarter of respondents share this opinion in Bulgaria (16%), Lithuania (21%), Portugal (22%), and Greece (24%).

More than one in five respondents rate job opportunities as 'very bad' in eight EU Member States, and at least three in ten in Bulgaria (39%), Lithuania (32%), and Greece (30%).

However, in six EU Member States, a majority of respondents rate job opportunities as 'good' in rural areas in their country: Luxembourg (69%), Denmark (60%), Belgium (59%), Malta (54%), Poland and the Netherlands (both 52%), and Italy (51%).

QA18.1 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
(% - Job opportunities)



Since 2020, the proportion of respondents who consider that job opportunities are good in rural areas in their country has gained ground in 18 EU Member States, most dramatically in Malta (54%, +16 percentage points), Denmark (60%, +14), and Slovenia (45%, +11). Conversely, it has lost ground in five countries, notably in Austria (46%, -8) and Germany (36%, -8). It is unchanged in Czechia, Romania, Latvia, and Bulgaria.

QA18.1 Overall, how would you rate the following in rural areas in (OUR COUNTRY)?
Job opportunities (%)

		EU27	MT	DK	SI	IT	CY	LU	ES	PL	BE	HR	HU	PT	NL	EL	FR	IE	LT	SK	BG	CZ	LV	RO	FI	EE	SE	DE	AT
Total 'Good'	Feb/Mar 2022	37	54	60	45	51	33	69	27	52	59	31	46	22	52	24	26	40	21	30	16	41	25	33	31	26	44	36	46
	Δ Aug/Sep 2020	▲1	▲16	▲14	▲11	▲7	▲7	▲6	▲5	▲5	▲4	▲4	▲4	▲4	▲3	▲2	▲2	▲1	▲1	▲1	=	=	=	=	▼1	▼2	▼3	▼8	▼8
Total 'Bad'	Feb/Mar 2022	58	39	35	53	45	60	24	70	40	39	69	53	66	43	73	64	56	70	66	79	57	73	64	67	68	53	60	51
	Δ Aug/Sep 2020	▼1	▼6	▼13	▼10	▼5	▼3	▼13	▼7	▼4	▼4	▼4	▼3	▼6	▼4	▼2	▼3	▼5	▼3	▼3	=	▲2	▲3	=	▼1	▼4	=	▲8	▲6
Don't know	Feb/Mar 2022	5	7	5	2	4	7	7	3	8	2	0	1	12	5	3	10	4	9	4	5	2	2	3	2	6	3	4	3

The socio-demographic data reveal that:

- In all socio-demographic categories, more than three-quarters of respondents believe that **the environment and landscape** are good in rural areas in their country;
- In all socio-demographic categories, only a minority of respondents think that **job opportunities** are good in rural areas in their country. This proportion is particularly low among respondents who left school at age 15 or earlier (33%), unemployed people (29%), and Europeans who have difficulties paying their bills most of the time (30%). However, respondents aged 25-39 (40%), those who left school between 16-19 (40%), managers (42%), self-employed people (40%), and other white-collar workers (40%) are the most likely to say that job opportunities are good in rural areas in their country;
- Respondents are more divided about the five remaining subjects. Interestingly, respondents who live in a rural village are generally most likely to consider that these services and infrastructures are good in rural areas in their country. This is particularly the case for **educational facilities** and **health services**: 61% and 56% respectively of respondents living in a rural village rate them as good, compared with 52% and 47% respectively of those living in a large town.

QA18 Overall, how would you rate the following in rural areas in (OUR COUNTRY)? (% - EU)

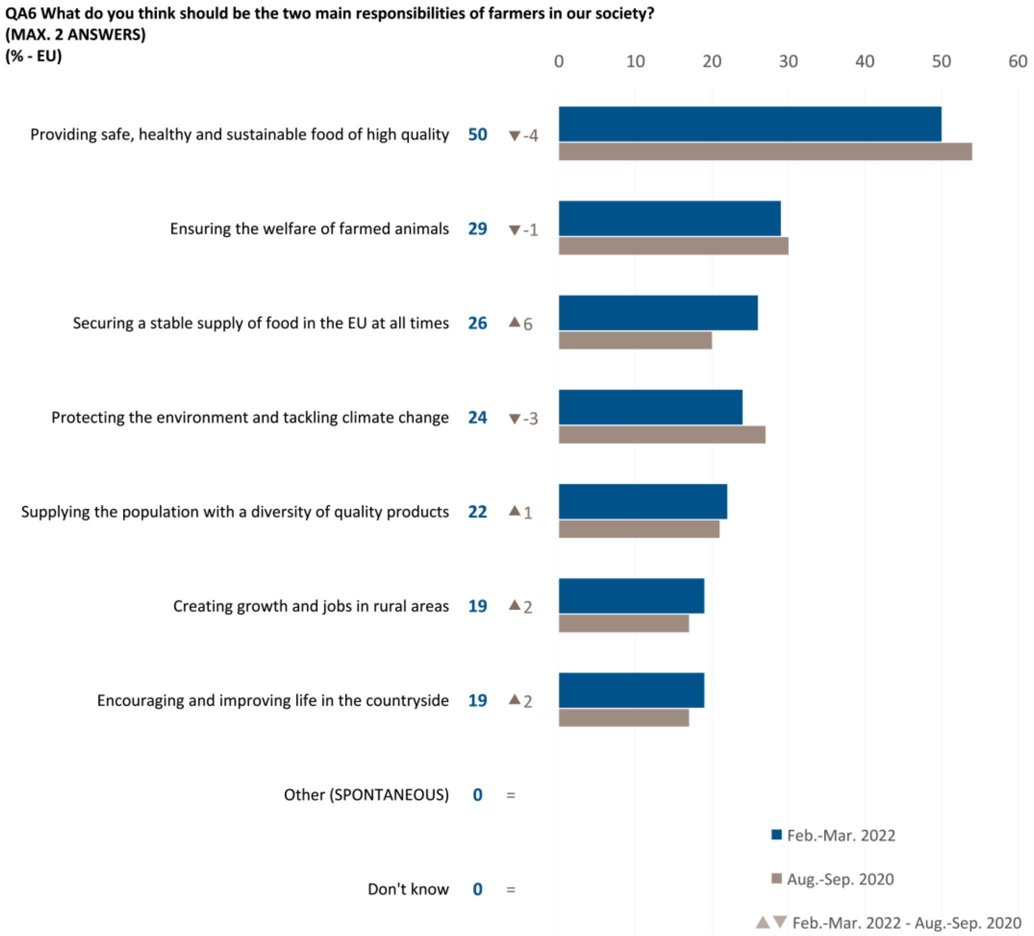
	Job opportunities		Educational facilities		Health services		Access to high-speed internet connections		Access to leisure and cultural activities		The environment and landscape		Transport infrastructure connecting to cities (quality of the roads and public transport)	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
EU27	37	58	55	39	50	46	51	40	54	41	85	12	50	47
Age														
15-24	38	57	56	38	53	42	54	42	55	41	85	13	49	47
25-39	40	57	56	40	50	47	52	44	55	41	85	13	50	47
40-54	38	57	55	40	47	49	54	40	54	41	87	11	51	46
55 +	37	57	55	38	50	46	48	37	53	40	86	11	50	47
Education (End of)														
15-	33	60	53	38	47	47	42	34	51	39	83	13	47	48
16-19	40	56	57	38	52	45	53	40	56	40	87	11	52	46
20+	38	57	55	40	48	48	53	41	53	42	87	11	51	47
Still studying	36	58	54	40	51	43	51	44	52	42	85	12	46	49
Socio-professional category														
Self-employed	40	55	55	40	47	50	53	41	54	43	86	13	51	47
Managers	42	55	58	38	52	45	55	42	58	38	87	11	53	45
Other white collars	40	55	55	40	52	44	56	39	55	39	86	11	54	43
Manual workers	38	58	57	39	50	47	54	41	56	41	86	12	51	47
House persons	38	56	54	38	51	45	49	36	53	38	83	14	53	43
Unemployed	29	68	49	44	46	50	48	45	49	46	83	14	43	54
Retired	36	57	56	36	49	46	45	37	51	41	86	11	48	48
Students	36	58	54	40	51	43	51	44	52	42	85	12	46	49
Difficulties paying bills														
Most of the time	30	65	49	46	41	55	43	44	48	46	43	54	43	54
From time to time	37	59	54	40	49	47	52	38	54	41	50	47	50	47
Almost never/ Never	38	56	57	38	51	45	52	40	55	40	51	46	51	46
Subjective urbanisation														
Rural village	39	57	61	35	56	42	55	36	56	40	86	13	51	47
Small/ mid size town	37	58	54	40	48	48	49	42	53	41	86	11	49	48
Large town	37	56	52	41	47	47	50	40	52	40	85	11	51	45

6. The responsibilities of farmers in our society

Half of Europeans think that providing safe, healthy and sustainable food of high quality is the main responsibility of farmers in our society

Respondents were asked to identify the two main responsibilities of farmers in our society by choosing up to two items from a list of seven[18]:

- One in two Europeans (50%, -4 percentage points since 2020) believe that **'providing safe, healthy and sustainable food of high quality'**[19] is one of the main responsibilities of farmers in our society, significantly ahead of any other responsibility;
- Close to three in ten respondents (29%, -1) cite **'ensuring the welfare of farmed animals'**;
- Around a quarter of Europeans mention **'securing a stable supply of food in the EU at all times'**[20] (26%, +6), slightly ahead of **'protecting the environment and tackling climate change'** (24%, -3);
- **'Supplying the population with a diversity of quality products'** (22%, +1) is the only other item to be cited by more than one in five respondents;
- Close to one in five Europeans consider that **'creating growth and jobs in rural areas'** (19%, +2) and **'encouraging and improving life in the countryside'** (19%, +2) are among the two main responsibilities of farmers in our society.



[18] QA6. What do you think should be the two main responsibilities of farmers in our society? Protecting the environment and tackling climate change; Creating growth and jobs in rural areas; Securing a stable supply of food in the EU at all times; Providing safe, healthy and sustainable food of high quality; Supplying the population with a diversity of quality products; Ensuring the welfare of farmed animals; Encouraging and improving life in the countryside; Other (SPONTANEOUS); Don't know.

[19] This item has been modified since 2020: from 'Providing safe, healthy food of high quality' to 'Providing safe, healthy and sustainable food of high quality'

[20] This item has been modified since 2020: from 'Securing a stable supply of food in the EU' to 'Securing a stable supply of food in the EU at all times'

In all 27 EU Member States, **providing safe, healthy food of high quality** is the most common answer, with more than six in ten respondents mentioning it in Portugal (69%), Finland and Malta (both 64%), and Sweden (61%). This proportion is lower in Latvia (39%), Lithuania (41%), and Croatia (42%).

None of the six other items ranks first among the two main responsibilities of farmers in our society in any EU Member State. However:

- More than a third of respondents cite **ensuring the welfare of farmed animals** in seven EU Member States, and at least four in ten in Sweden (42%), France and the Netherlands (both 41%), and Denmark (40%);
- At least a third of respondents mention **securing a stable supply of food in the EU at all times** in seven countries, with the highest numbers in Finland (44%), Germany (41%), and Sweden (37%);
- **Protecting the environment and tackling climate change** scores highest in Denmark (44%), France (35%), and Malta (33%);
- **Supplying the population with a diversity of quality products** is cited by more than a third of respondents in Bulgaria (37%), Slovakia (36%), and Greece (35%);
- Close to a third of respondents mention **creating growth and jobs in rural areas** in Bulgaria (32%), slightly ahead of Estonia, Latvia, Lithuania, and Croatia (all 30%);
- At least a third of respondents think that **encouraging and improving life in the countryside** is one of the main responsibilities of farmers in our society in Latvia (37%), Croatia (34%), and Bulgaria (33%).

QA6 What do you think should be the two main responsibilities of farmers in our society? (MAX. 2 ANSWERS)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Providing safe, healthy and sustainable food of high quality	**50**	**54**	**49**	**55**	**52**	**46**	**53**	**51**	**53**	**50**	**50**	**42**	**54**	**46**	**39**	**41**	**53**	**47**	**64**	**58**	**48**	**45**	**69**	**43**	**53**	**49**	**64**	**61**
Ensuring the welfare of farmed animals	29	26	*9*	25	40	34	17	32	*21*	26	41	*17*	29	25	*11*	*15*	38	*14*	29	41	32	*16*	18	*14*	29	16	36	42
Securing a stable supply of food in the EU at all times	26	31	15	33	28	41	25	35	24	*17*	17	19	*16*	*15*	24	21	34	29	18	34	30	27	32	23	27	27	44	37
Protecting the environment and tackling climate change	24	32	15	20	44	25	*9*	20	22	20	35	*17*	26	31	16	19	26	18	33	29	23	18	14	*14*	18	*12*	12	27
Supplying the population with a diversity of quality products	22	21	37	24	*6*	17	24	18	35	21	21	26	19	29	32	32	19	31	26	23	27	31	29	26	25	36	11	10
Creating growth and jobs in rural areas	*19*	*11*	32	*15*	12	*14*	30	20	24	27	15	30	24	21	30	30	12	25	*10*	*4*	19	20	19	25	*14*	24	*8*	10
Encouraging and improving life in the countryside	*19*	12	33	16	9	*14*	32	*14*	*21*	23	*14*	34	24	31	37	29	*10*	21	13	7	*15*	27	*13*	30	24	22	15	*8*
Other (SPONTANEOUS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	0	0	1	0	1	0	1	0	0	1	1	0	0	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0

Highest percentage per country
Lowest percentage per country
Highest percentage per item
Lowest percentage per item

Since 2020, views have evolved at national level by more than five percentage points for all items:

- The share of respondents who think that **providing safe, healthy food of high quality** is one of the two main responsibilities of farmers in EU society has decreased in 22 EU Member States, most dramatically in Ireland (51%, -16 percentage points), Luxembourg (53%, -14), Cyprus (46%, -14), Latvia (39%, -12), and Lithuania (41%, -11). Meanwhile, it has increased in five countries, particularly in Malta (64%, +6);
- The belief that **ensuring the welfare of farmed animals** is one of the main responsibilities of farmers in our society has lost ground in 14 EU Member States, most notably in Denmark (40%, -7 percentage points). Conversely, it has gained ground in ten countries, particularly in Slovenia (29%, +7);
- The proportion of respondents who mention **securing a stable supply of food in the EU at all times** has risen in 25 EU Member States, including by double digits in Ireland (35%, +11 percentage points), Germany (41%, +10), and Greece (24%, +10). It has fallen slightly in Malta (18%, -4) and Estonia (25%, -1);
- **Protecting the environment and tackling climate change** is mentioned less than in the previous survey in 17 EU Member States, most notably in Ireland (20%, -10 percentage points). It has increased slightly in five countries, particularly in Malta (33%, +5);
- **Supplying the population with a diversity of quality products** has gained ground in 15 EU Member States, most notably in Latvia (32%, +8 percentage points) and Ireland (18%, +8). It has lost support in eight countries, most dramatically in Malta (26%, -12);
- The share of respondents who cite **creating growth and jobs in rural areas** has risen in 18 EU Member States, particularly in Ireland (20%, +9 percentage points). It has fallen by no more than three percentage points in five countries;
- **Encouraging and improving life in the countryside** has gained ground in 14 EU Member States, most strikingly in Spain (23%, +10 percentage points). Conversely, it has lost ground in nine countries, notably in Finland (15%, -6).

QA6 What do you think should be the two main responsibilities of farmers in our society? (MAX. 2 ANSWERS)
(%)

		EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Providing safe, healthy and sustainable food of high quality	Feb/Mar 2022	50	54	49	55	52	46	53	51	53	50	50	42	54	46	39	41	53	47	64	58	48	45	69	43	53	49	64	61
	Δ Aug/Sep 2020	▼4	▼7	▼9	▼1	▼2	▼3	▼8	▼16	▼7	▼7	▼7	▼7	▼5	▼14	▼12	▼11	▼14	▼4	▲6	▼7	▲5	▲3	▲4	▲3	▼4	▼8	▼5	▼4
Ensuring the welfare of farmed animals	Feb/Mar 2022	29	26	9	25	40	34	17	32	21	26	41	17	29	25	11	15	38	14	29	41	32	16	18	14	29	16	36	42
	Δ Aug/Sep 2020	▼1	▼2	▲1	=	▼7	▼4	▲6	▼4	▼4	▲6	▼3	▲4	▲2	▲4	▼1	=	▼3	▲1	▲6	▼2	=	▼3	▼5	▼2	▲7	▼3	▲2	▼4
Securing a stable supply of food in the EU at all times	Feb/Mar 2022	26	31	15	33	28	41	25	35	24	17	17	19	16	15	24	21	34	29	18	34	30	27	32	23	27	27	44	37
	Δ Aug/Sep 2020	▲6	▲1	▲6	▲8	▲4	▲10	▼1	▲11	▲10	▲1	▲5	▲3	▲5	▲5	▲8	▲3	▲6	▲4	▼4	▲4	▲3	▲8	▲6	▲7	▲2	▲3	▲9	▲9
Protecting the environment and tackling climate change	Feb/Mar 2022	24	32	15	20	44	25	9	20	22	20	35	17	26	31	16	19	26	18	33	29	23	18	14	14	18	12	12	27
	Δ Aug/Sep 2020	▼3	▼2	▼1	=	▲3	▼3	▼3	▼10	▼5	▼9	▲1	▲3	=	▲1	=	=	=	▼2	▲5	▼6	▼1	▼4	▼2	▼4	▼1	▼4	▼4	▼2
Supplying the population with a diversity of quality products	Feb/Mar 2022	22	21	37	24	6	17	24	18	35	21	21	26	19	29	32	32	19	31	26	23	27	31	29	26	25	36	11	10
	Δ Aug/Sep 2020	▲1	▲3	▼3	▼7	▼3	▼2	=	▲8	▲5	▲5	▲4	▼2	▼2	▲5	▲8	▲2	▲7	=	▼12	▲7	▼3	▲1	=	▲1	=	▲4	▲1	▲3
Creating growth and jobs in rural areas	Feb/Mar 2022	19	11	32	15	12	14	30	20	24	27	15	30	24	21	30	30	12	25	10	4	19	20	19	25	14	24	8	10
	Δ Aug/Sep 2020	▲2	▲3	▲4	▲4	▲2	▲3	▲4	▲9	▲2	▼3	▲3	▲3	▲5	=	▼3	▲3	▲4	▲5	▼1	▲2	▲4	=	▲1	▼2	=	▲4	▼1	=
Encouraging and improving life in the countryside	Feb/Mar 2022	19	12	33	16	9	14	32	14	21	23	14	34	24	31	37	29	10	21	13	7	15	27	13	30	24	22	15	8
	Δ Aug/Sep 2020	▲2	▲4	▲3	▲1	=	▲1	▼3	=	▲3	▲10	▼1	▼1	▲4	▲8	▲5	▲3	▲1	▼5	▲2	▲2	▼5	=	▼1	▲1	=	▼1	▼6	▼2
Other (SPONTANEOUS)	Feb/Mar 2022	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Δ Aug/Sep 2020	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=
Don't know	Feb/Mar 2022	0	0	1	0	1	0	1	0	0	1	1	0	0	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0

The socio-demographic data show that:

- Men are more likely than women to say that **securing a stable supply of food in the EU at all times** should be one of the two main responsibilities of farmers in our society (30% compared with 23%). However, women are more likely to mention **ensuring the welfare of farmed animals** (32% compared with 26%);
- Respondents aged 15-24 are more likely than those aged 55 and over to cite **protecting the environment and tackling climate change** (29% compared with 23%), but they are less likely to cite **encouraging and improving life in the countryside** (15% compared with 20%);
- Europeans who continued in education up to age 20 or beyond are more likely than those who left school at age 15 or earlier to mention **protecting the environment and tackling climate change** (27% compared with 20%) and **securing a stable supply of food in the EU at all times** (29% compared with 23%), but they are less likely to cite **creating growth and jobs in rural areas** (14% compared with 23%);
- Respondents who never or almost never have difficulties paying their bills are more likely than those who have such difficulties most of the time to consider that **ensuring the welfare of farmed animals** is one of the two main responsibilities of farmers in our society (30% compared with 25%).

Moreover, Europeans who consider that agriculture and rural areas are important for the future in the European Union are more likely to cite **providing safe, healthy food of high quality** (51%, compared with 42% of those who think this is not important).

QA6 What do you think should be the two main responsibilities of farmers in our society? (MAX. 2 ANSWERS)
(% - EU)

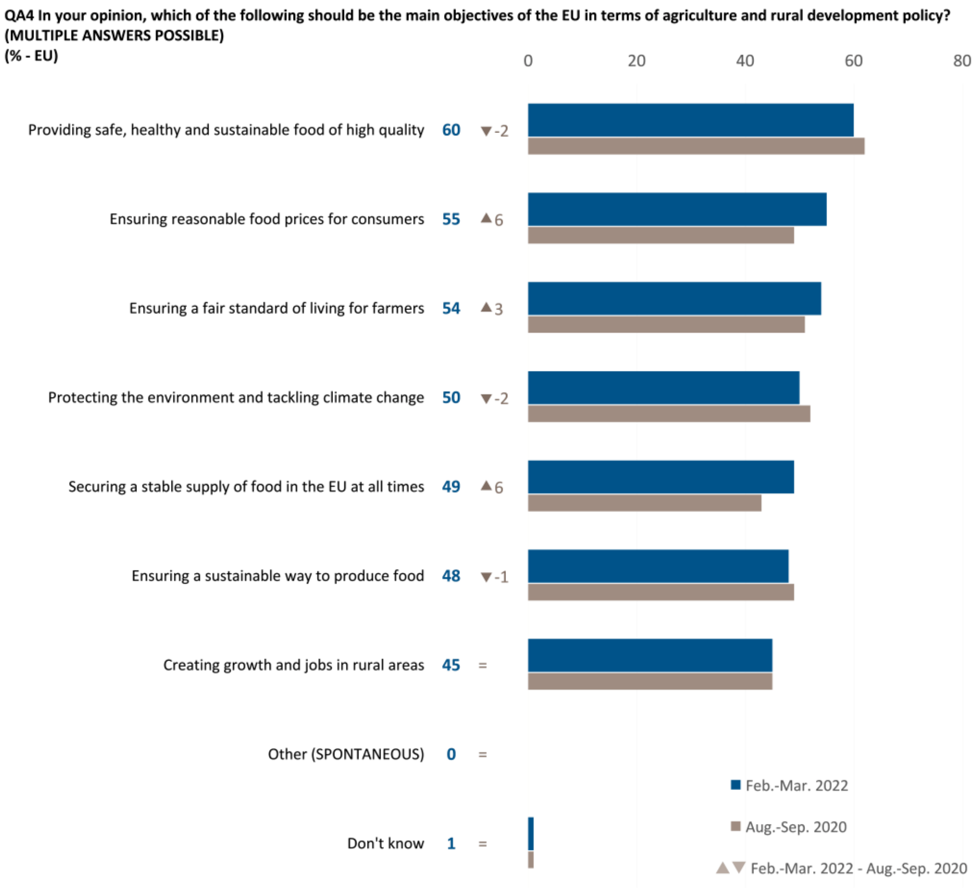
	Protecting the environment and tackling climate change	Creating growth and jobs in rural areas	Securing a stable supply of food in the EU at all times	Providing safe, healthy and sustainable food of high quality	Supplying the population with a diversity of quality products	Ensuring the welfare of farmed animals	Encouraging and improving life in the countryside
EU27	24	19	26	50	22	29	19
Gender							
Man	23	20	30	50	23	26	19
Woman	25	18	23	51	21	32	19
Age							
15-24	29	16	27	47	21	33	15
25-39	25	20	28	50	21	28	18
40-54	23	20	26	51	22	28	20
55 +	23	19	26	51	22	29	20
Education (End of)							
15-	20	23	23	50	23	28	20
16-19	23	21	26	48	22	29	21
20+	27	14	29	54	22	29	17
Still studying	30	15	27	50	19	34	14
Difficulties paying bills							
Most of the time	25	21	26	48	22	25	19
From time to time	23	22	23	48	24	27	21
Almost never/ Never	25	18	27	51	21	30	18
View on agriculture and rural areas in EU							
Important	24	19	27	51	22	29	19
Not Important	21	19	24	42	22	25	20

7. Main objectives of the EU for agriculture and rural development policy

Six in ten Europeans say providing safe, healthy and sustainable food of high quality should be one of the main objectives of the EU in terms of agriculture and rural development policy

When asked which items from a list of seven should be the main objectives of the European Union in terms of agriculture and rural development policy[21], respondents identify the following hierarchy:

- Six in ten Europeans (60%, -2 percentage points since 2020) consider that **'providing safe, healthy and sustainable food of high quality'**[22] should be one of the main objectives of the EU in terms of agriculture and rural development;
- More than half of respondents cite **'ensuring reasonable food prices for consumers'** (55%, +6, one of the two largest increases since 2020) and **'ensuring a fair standard of living for farmers'** (54%, +3);
- **'Protecting the environment and tackling climate change'** is mentioned by one in two respondents (50%, -2);
- Nearly half of Europeans believe that **'securing a stable supply of food in the EU at all times'**[23] (49%, +6, one of the two largest increases since 2020) and **'ensuring a sustainable way to produce food'** (48%, -1) should be among the main objectives of the EU's agriculture and rural development;
- More than four in ten respondents cite **'creating growth and jobs in rural areas'** (45%, unchanged).



[21] QA4. In your opinion, which of the following should be the main objectives of the EU in terms of agriculture and rural development policy? Ensuring a fair standard of living for farmers; Creating growth and jobs in rural areas; Ensuring reasonable food prices for consumers; Securing a stable supply of food in the EU at all times; Ensuring a sustainable way to produce food; Protecting the environment and tackling climate change; Providing safe, healthy and sustainable food of high quality; Other (SPONTANEOUS); Don't know.

[22] This item has been modified since 2020: from 'Providing safe, healthy food of high quality' to 'Providing safe, healthy and sustainable food of high quality'

[23] This item has also been modified since 2020: from 'Securing a stable supply of food in the EU' to 'Securing a stable supply of food in the EU at all times'

Providing safe, healthy and sustainable food of high quality is the most cited objective in 18 EU Member States, with the highest proportions in Portugal (82%), Cyprus (75%, same score as ensuring reasonable food prices for consumers), and Malta and Slovenia (both 70%). In addition, close to three-quarters of respondents also cite this item in Greece (74%).

Ensuring reasonable food prices for consumers is the most common answer in seven EU Member States: in Greece (76%), Cyprus (75%, same score as providing safe, healthy and sustainable food of high quality), Bulgaria (62%), Hungary (61%), Czechia (58%), Latvia (57%), and Poland (52%). At least six in ten respondents also cite it in Portugal (76%), Malta (64%), Slovenia (61%), and Slovakia (60%).

Ensuring a fair standard of living for farmers is mentioned by a majority of respondents as one of the main objectives of the EU in terms of agriculture and rural development policy by a majority of respondents in France (68%), Spain (62%), and Luxembourg (61%, same score as providing safe, healthy and sustainable food of high quality). More than six in ten respondents also mention ensuring a fair standard of living for farmers in Portugal (66%), Greece (65%), and Finland and Cyprus (both 63%).

Securing a stable supply of food in the EU at all times comes in first place in Finland (68%), Sweden (64%), and Germany (61%, same score as providing safe, healthy and sustainable food of high quality). At least six in ten respondents also cite securing a stable supply of food in the EU at all times in Slovenia (63%) and Portugal (60%).

None of the three other items heads the list of the main objectives of the EU in terms of agriculture and rural development policy in any of the 27 EU Member States. However:

- **Protecting the environment and tackling climate change** is cited by at least half of respondents in 14 EU Member States, and by more than six in ten in Malta (69%), Cyprus (66%), the Netherlands (62%), and France (61%);
- At least half of respondents mention **ensuring a sustainable way to produce food** in 12 EU Member States, and over six in ten in Portugal (66%), the Netherlands (63%), Sweden (62%), and Slovenia (61%);
- More than half of respondents cite **creating growth and jobs in rural areas** in 11 EU Member States, and more than six in ten in Cyprus (71%), significantly ahead of Portugal and Greece (both 64%), and Spain (61%).

QA4 In your opinion, which of the following should be the main objectives of the EU in terms of agriculture and rural development policy? (MULTIPLE ANSWERS POSSIBLE)
(%)

		EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Ensuring a fair standard of living for farmers	Feb/Mar 2022	54	52	50	41	32	58	39	49	65	62	68	49	42	63	44	40	61	42	59	53	52	44	66	48	60	52	63	55
	Δ Aug/Sep 2020	▲3	▼9	▲1	=	▼8	▲2	▼4	▼5	▲7	▲7	▲2	▲7	▲3	▲6	▼4	▲5	▲1	▲4	▼7	▲7	▲1	▲4	▲7	▲3	▲1	▼4	▲16	▲7
Creating growth and jobs in rural areas	Feb/Mar 2022	45	24	57	33	33	42	60	42	64	61	44	56	48	71	53	58	34	43	42	24	47	36	64	48	55	55	31	43
	Δ Aug/Sep 2020	=	▼8	▲2	▲1	▼7	▲2	▼5	▼6	▲2	▲5	▼2	▲6	▲4	▲11	▼7	▲6	▲5	▲2	=	▲2	▲7	▼1	▲2	▼1	=	▼3	▼3	▲2
Ensuring reasonable food prices for consumers	Feb/Mar 2022	55	46	62	58	41	54	52	50	76	52	58	56	54	75	57	58	48	61	64	48	55	52	76	49	61	60	42	41
	Δ Aug/Sep 2020	▲6	▲2	▼1	▼2	▼5	▲8	▼5	▲12	▲5	▲8	▲8	▲5	▲10	▲12	▲9	▲9	▲14	▲4	▼5	▲10	▲3	▲4	▲6	▲2	▼2	▼7	▲4	▲11
Securing a stable supply of food in the EU at all times	Feb/Mar 2022	49	45	39	47	49	61	47	51	56	44	43	36	42	52	43	51	52	49	48	59	55	40	60	37	63	51	68	64
	Δ Aug/Sep 2020	▲6	▼1	▲6	▲6	▼2	▲6	=	▲4	▲10	▲10	▲3	▲1	▲10	▲6	▲6	▲11	▲5	▲3	▼7	▲1	▲4	▲5	▲2	▲3	▲4	▼5	▲14	▲10
Ensuring a sustainable way to produce food	Feb/Mar 2022	48	45	40	50	54	50	53	48	55	49	47	45	49	56	38	38	49	38	57	63	48	37	66	39	61	53	44	62
	Δ Aug/Sep 2020	▼1	▼11	▲3	▲7	▼9	▼4	▼7	▼11	▲4	▼2	▲2	▲7	▲5	▲1	▲3	▲8	▼2	▼4	▼11	▼10	▲4	▲3	▲3	▲4	▲5	▼2	▼7	▼1
Protecting the environment and tackling climate change	Feb/Mar 2022	50	50	35	40	55	54	31	42	57	50	61	37	47	66	34	43	54	39	69	62	52	33	60	37	55	43	28	58
	Δ Aug/Sep 2020	▼2	▼8	▼7	=	▼10	▼5	▼16	▼12	▼1	=	▼3	▲3	▲7	▲1	▼3	▲9	▲1	▼6	▲5	▼4	=	▼5	▲4	▼1	=	▼8	=	▲1
Providing safe, healthy and sustainable food of high quality	Feb/Mar 2022	60	57	60	56	59	61	61	56	74	56	59	58	63	75	55	60	61	61	70	67	61	49	82	51	70	64	60	62
	Δ Aug/Sep 2020	▼2	▼7	▼9	▼4	▼6	▼3	▼14	▼7	▼1	▲4	▼6	=	▲1	▲3	▼6	=	▼7	=	▼3	▼7	▼1	▼2	▲5	▲1	▼4	▼10	▼11	▼7
Other (SPONTANEOUS)	Feb/Mar 2022	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Δ Aug/Sep 2020	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	=	▼1	=	=	=	=	=	=	=
Don't know	Feb/Mar 2022	1	0	1	0	1	1	1	1	0	2	2	0	1	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0

Since 2020, all the objectives have seen changes at national level of more than five percentage points:

- The proportion of respondents who believe that **ensuring a fair standard of living for farmers** is one of the main objectives of the EU for agriculture and rural development policy has increased in 19 EU Member States, most dramatically in Finland (63%, +16 percentage points). It has decreased in seven countries, notably in Belgium (52%, -9);
- The share of respondents mentioning **creating growth and jobs in rural areas** has risen in 15 EU Member States, most strikingly in Cyprus (71%, +11 percentage points). It has fallen in ten countries, most notably in Belgium (24%, -8);
- **Ensuring reasonable food prices for consumers** has gained ground in 20 EU Member States, including by double digits in six countries: in Luxembourg (48%, +14 percentage points), Cyprus (75%, +12), Ireland (50%, +12), Sweden (41%, +11), Italy (54%, +10), and the Netherlands (48%, +10). It has lost ground in seven countries, notably in Slovakia (60%, -7);
- **Securing a stable supply of food in the EU at all times** has gained ground in 22 EU Member States, and at least ten percentage points in Finland (68%, +14 percentage points), Lithuania (51%, +11), Sweden (64%, +10), Greece (56%, +10), Spain (44%, +10), and Italy (42%, +10). It has lost ground in four countries, most notably in Malta (48%, -7);
- The proportion of respondents who cite **ensuring a sustainable way to produce food** has risen in 14 EU Member States, most notably in Lithuania (38%, +8 percentage points). Meanwhile, it has fallen in 13 countries, most dramatically in Malta (57%, -11), Ireland (48%, -11), Belgium (45%, -11), and the Netherlands (63%, -10);
- **Protecting the environment and tackling climate change** has lost ground in 14 EU Member States, most strikingly in Estonia (31%, -16 percentage points), Ireland (42%, -12), and Denmark (55%, -10). Conversely, it has gained ground in eight countries, notably in Lithuania (43%, +9);
- The share of respondents who think that **providing safe, healthy and sustainable food of high quality** is one of the main objectives of the EU in terms of agriculture and rural development policy has decreased in 19 EU Member States, including by double digits in Estonia (61%, -14 percentage points), Finland (60%, -11), and Slovakia (64%, -10). It has increased slightly in five countries, including Portugal (82%, +5).

QA4 In your opinion, which of the following should be the main objectives of the EU in terms of agriculture and rural development policy? (MULTIPLE ANSWERS POSSIBLE)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Providing safe, healthy and sustainable food of high quality	60	57	60	56	59	61	61	56	74	56	59	58	63	75	55	60	61	61	70	67	61	49	82	51	70	64	60	62
Ensuring reasonable food prices for consumers	55	46	62	58	41	54	52	50	76	52	58	56	54	75	57	58	48	61	64	48	55	52	76	49	61	60	42	41
Ensuring a fair standard of living for farmers	54	52	50	41	32	58	39	49	65	62	68	49	42	63	44	40	61	42	59	53	52	44	66	48	60	52	63	55
Protecting the environment and tackling climate change	50	50	35	40	55	54	31	42	57	50	61	37	47	66	34	43	54	39	69	62	52	33	60	37	55	43	28	58
Securing a stable supply of food in the EU at all times	49	45	39	47	49	61	47	51	56	44	43	36	42	52	43	51	52	49	48	59	55	40	60	37	63	51	68	64
Ensuring a sustainable way to produce food	48	45	40	50	54	50	53	48	55	49	47	45	49	56	38	38	49	38	57	63	48	37	66	39	61	53	44	62
Creating growth and jobs in rural areas	45	24	57	33	33	42	60	42	64	61	44	56	48	71	53	58	34	43	42	24	47	36	64	48	55	55	31	43
Other (SPONTANEOUS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	1	0	1	0	1	1	1	1	0	2	2	0	1	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

The socio-demographic data show that:

- Women (62%) are more likely than men (57%) to consider that **providing safe, healthy and sustainable food of high quality** should be one of the main objectives of the EU in terms of agriculture and rural development policy;
- Respondents aged 55 and over are more likely than those aged 15-24 to cite **ensuring reasonable food prices for consumers** (57% compared with 50%) and **ensuring a fair standard of living for farmers** (57% compared with 52%);
- Europeans who continued in education up to age 20 or beyond are more likely than those who left school at age 15 or earlier to mention **protecting the environment and tackling climate change** (56% compared with 45%), **ensuring a sustainable way to produce food** (54% compared with 44%) and **securing a stable supply of food in the EU at all times** (54% compared with 45%), but they are less likely to cite **ensuring reasonable food prices for consumers** (52% compared with 59%) and **creating growth and jobs in rural areas** (44% compared with 49%);
- Managers are the most likely to say that **protecting the environment and tackling climate change** (56%, same score as among students, compared with 44% among house persons) and **securing a stable supply of food in the EU at all times** (55%, compared with 43% among house persons) and **ensuring a sustainable way to produce food** (53%, same score as self-employed people, compared with 45% among house persons) should be the main objectives of the EU in terms of agriculture and rural development policy;
- Respondents who have difficulties paying their bills most of the time are more likely than those who never or almost never have such difficulties to mention **ensuring reasonable food prices for consumers** (63% compared with 53%) and **creating growth and jobs in rural areas** (50% compared with 45%).

In addition, respondents who think that agriculture and rural areas are important for the future in the EU are far more likely to mention the seven objectives, for **instance ensuring a fair standard of living for farmers** (55%, compared with 29% of those who think agriculture and rural areas are not important).

QA4 In your opinion, which of the following should be the main objectives of the EU in terms of agriculture and rural development policy?
(MULTIPLE ANSWERS POSSIBLE) (% - EU)

	Ensuring a fair standard of living for farmers	Creating growth and jobs in rural areas	Ensuring reasonable food prices for consumers	Securing a stable supply of food in the EU at all times	Ensuring a sustainable way to produce food	Protecting the environment and tackling climate change	Providing safe, healthy and sustainable food of high quality
EU27	54	45	55	49	48	50	60
Gender							
Man	53	45	54	50	47	48	57
Woman	55	46	55	47	49	51	62
Age							
15-24	52	42	50	47	47	51	57
25-39	52	44	53	48	48	51	58
40-54	54	47	54	50	49	51	60
55 +	57	46	57	49	48	48	61
Education (End of)							
15-	56	49	59	45	44	45	59
16-19	54	47	56	47	45	46	58
20+	56	44	52	54	54	56	63
Still studying	52	40	50	47	50	56	58
Socio-professional category							
Self-employed	54	48	54	50	53	49	64
Managers	53	44	48	55	53	56	62
Other white collars	54	45	54	51	49	52	62
Manual workers	54	47	56	46	46	46	57
House persons	47	45	54	43	45	44	56
Unemployed	55	50	59	49	47	53	58
Retired	57	45	58	49	47	48	60
Students	52	40	50	47	50	56	58
Difficulties paying bills							
Most of the time	54	50	63	48	45	52	58
From time to time	53	47	56	44	45	45	58
Almost never/ Never	55	45	53	50	49	51	60
View on agriculture and rural areas in EU							
Important	55	46	55	50	49	51	61
Not Important	29	25	43	31	28	28	39

II. THE COMMON AGRICULTURAL POLICY (CAP): AWARENESS, IMPORTANCE, AND CONTRIBUTION TO THE EU'S PRIORITIES

This second chapter deals with the general public's awareness of the common agricultural policy (CAP). It explores whether Europeans believe that the EU through the CAP is fulfilling its role in seven areas. It also examines the perceived importance of nine priorities of the CAP, before assessing its contributions in these nine areas. The chapter concludes with Europeans' views on whether the CAP benefits all Europeans.

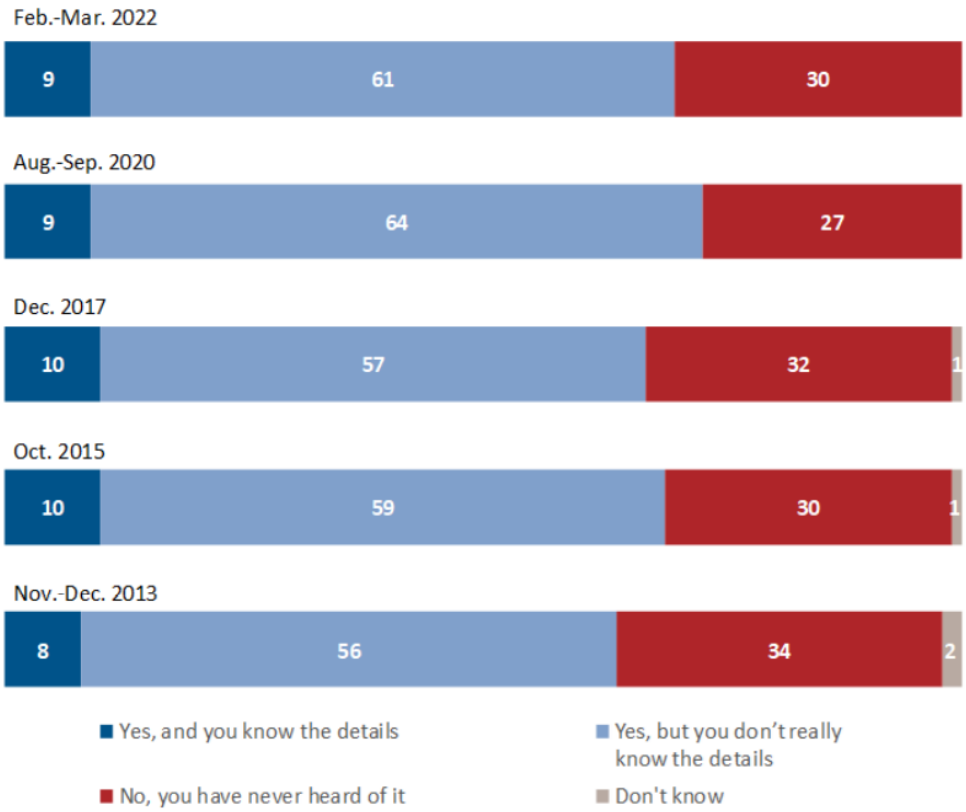
1. Awareness of the CAP

Seven in ten Europeans have heard of the support that the European Union gives farmers through its CAP, but less than one in ten know the details

Seven in ten respondents (70%, -3 percentage points since 2020) respond that they have heard of the support that the EU gives farmers through its common agricultural policy[24]. However, this proportion includes more than six in ten respondents (61%, -3) who 'don't really know the details' compared with fewer than one in ten (9%, unchanged) who 'know the details'. Meanwhile, three in ten respondents (30%, +3) have never heard of the CAP.

Down from 73% to 70%, awareness of the CAP has lost three percentage points since 2020, when it reached its highest level since 2013. However, it stands at its second highest level since 2013, with a six-percentage point increase over the period.

QA2. Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)? (% - EU)

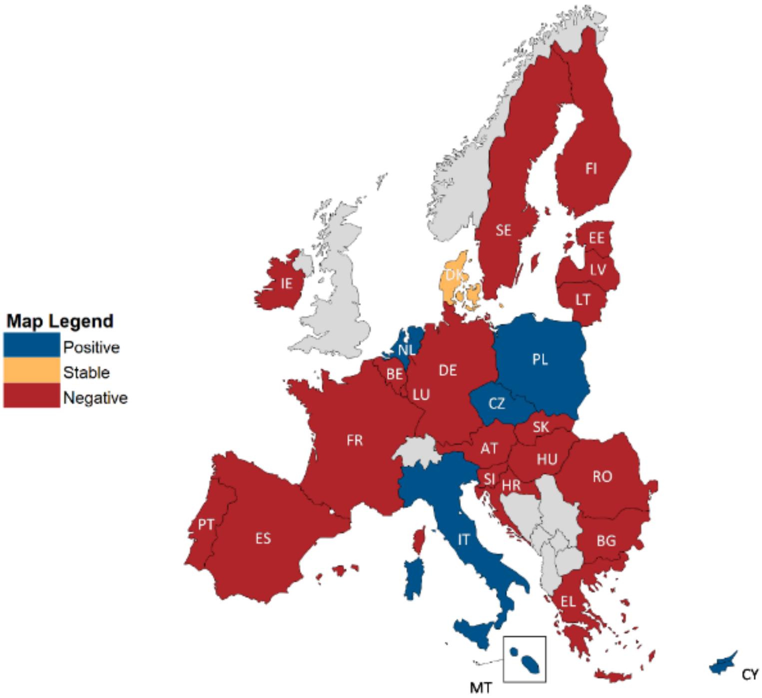


[24] QA2. Have you ever heard about the support that the EU gives farmers through its Common Agricultural Policy (CAP)? Yes, and you know the details; Yes, but you don't really know the details; No, you have never heard of it, Don't Know.

Respondents in the Nordic EU Member States are among the most likely to have heard of the support that the European Union gives farmers through its common agricultural policy.

QA2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)?
(%- Total 'Yes')

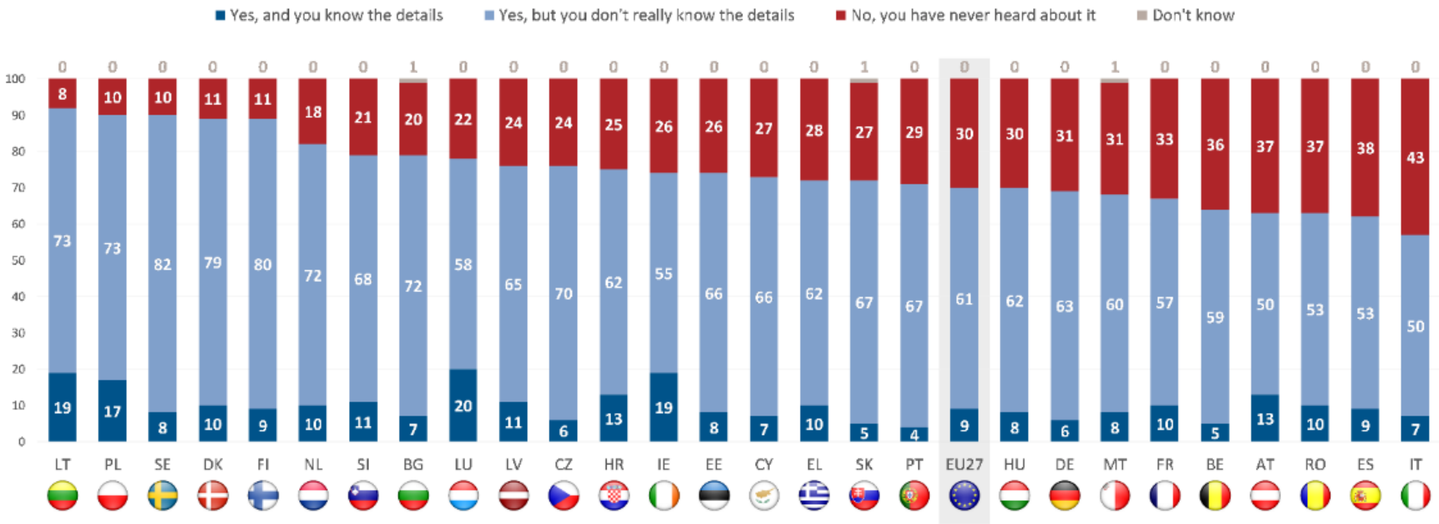
LT	92	▼-2
PL	90	▲1
SE	90	▼-3
DK	89	=
FI	89	▼-3
NL	82	▲1
BG	79	▼-1
SI	79	▼-2
LU	78	▼-3
CZ	76	▲9
LV	76	▼-3
HR	75	▼-6
EE	74	▼-10
IE	74	▼-12
CY	73	▲3
EL	72	▼-2
SK	72	▼-6
PT	71	▼-1
HU	70	▼-2
EU27	70	▼-3
DE	69	▼-7
MT	68	▲2
FR	67	▼-1
BE	64	▼-11
RO	63	▼-7
AT	63	▼-8
ES	62	▼-15
IT	57	▲6



In all 27 EU Member States, large majorities of respondents say they have heard of the support that the EU gives farmers through the CAP. Around nine in ten respondents have heard of it in Lithuania (92%), Poland and Sweden (both 90%), and Denmark and Finland (both 89%). However, less than two-thirds of respondents have heard of the CAP in Italy (57%), Spain (62%), Romania and Austria (both 63%), and Belgium (64%).

In addition, at least one in ten respondents are aware of the support that the EU gives farmers through the CAP and 'know the details' in 13 EU Member States, with the highest levels in Luxembourg (20%), Lithuania and Ireland (both 19%), and Poland (17%).

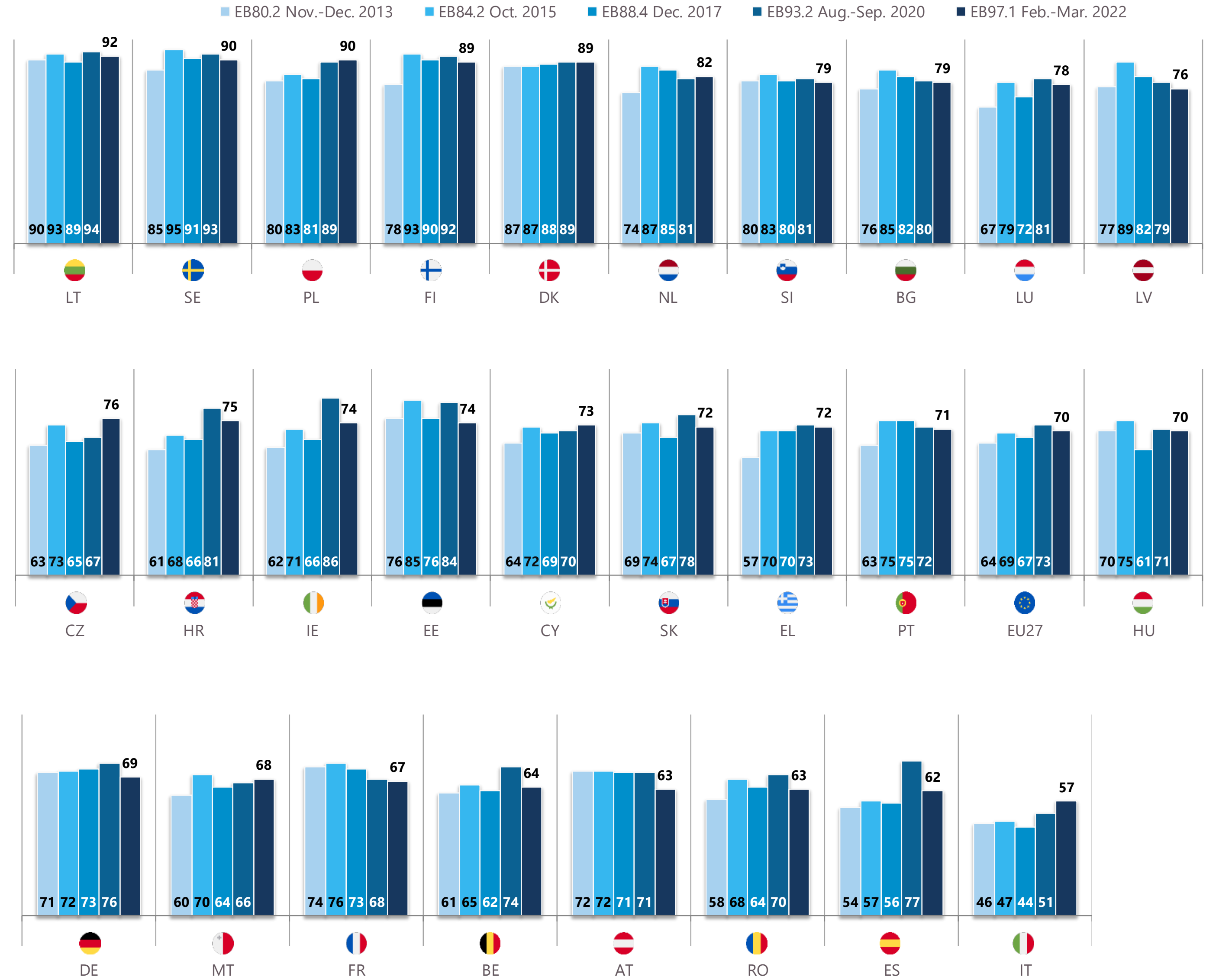
QA2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)?
(%)



Since 2020, the proportion of respondents who answer that they have heard of the support that the EU gives farmers through its CAP has fallen in 20 EU Member States, most dramatically in Spain (62%, -15 percentage points), Ireland (74%, -12), Belgium (64%, -11), and Estonia (74%, -10). Meanwhile, it has risen in six countries, particularly in Czechia (76%, +9). It is unchanged in Denmark.

A longer-term trend analysis shows that awareness of the CAP has gained ground in 20 EU Member States since 2013. It has increased by double digits in eight countries: Greece (up from 57% in 2013 to 72% in 2022), Croatia (up from 61% to 75%), Czechia (up from 63% to 76%), Ireland (up from 62% to 74%), Finland (up from 78% to 89%), Luxembourg (up from 67% to 78%), Italy (up from 46% to 57%), and Poland (up from 80% to 90%). Conversely, it has lost ground in six countries, particularly in Austria (down from 72% to 63%) and France (down from 74% to 67%). It is unchanged in Hungary.

QA2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)?
(% - TOTAL 'YES')



The socio-demographic data show that more than half of respondents have heard of the support that the EU gives farmers through its CAP in all socio-demographic categories. However:

- Men (73%) are more likely than women (67%) to say they have heard of this support;
- Respondents aged 40-54 (76%) and 55 and over (73%) are much more aware of the CAP than those aged 15-24 (51%);
- Europeans who continued in education up to age 20 or beyond (81%) are more likely than those who left school at age 15 or earlier (59%) to say they have heard of this support;
- Managers (82%) and self-employed people (81%) are the most likely to be aware of the CAP compared with 55% among house persons and 56% among students;
- Respondents who never or almost never have difficulties paying their bills (73%) are more likely than those who have such difficulties most of the time (61%) to be aware of the CAP;

Moreover, respondents who consider that agriculture and rural areas are important for the future in the EU (70%) are more likely to be aware of the CAP compared with 58% among those who think that agriculture and rural areas are not important for the future in the EU.

QA2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)? (% - EU)

	Yes, and you know the details	Yes, but you don't really know the details	No, you have never heard about it	Total 'Yes'
EU27	9	61	30	70
Gender				
Man	11	62	27	73
Woman	7	60	33	67
Age				
15-24	5	46	49	51
25-39	9	58	33	67
40-54	10	66	24	76
55 +	10	63	27	73
Education (End of)				
15-	6	53	41	59
16-19	8	61	31	69
20+	12	69	19	81
Still studying	5	51	44	56
Socio-professional category				
Self-employed	16	65	19	81
Managers	12	70	18	82
Other white collars	9	63	28	72
Manual workers	7	59	34	66
House persons	5	50	45	55
Unemployed	6	55	38	61
Retired	10	64	26	74
Students	5	51	44	56
Difficulties paying bills				
Most of the time	8	53	39	61
From time to time	8	56	36	64
Almost never/ Never	10	63	27	73
View on agriculture and rural areas in EU				
Important	9	61	30	70
Not Important	4	54	42	58

2. The perceived performance of the CAP

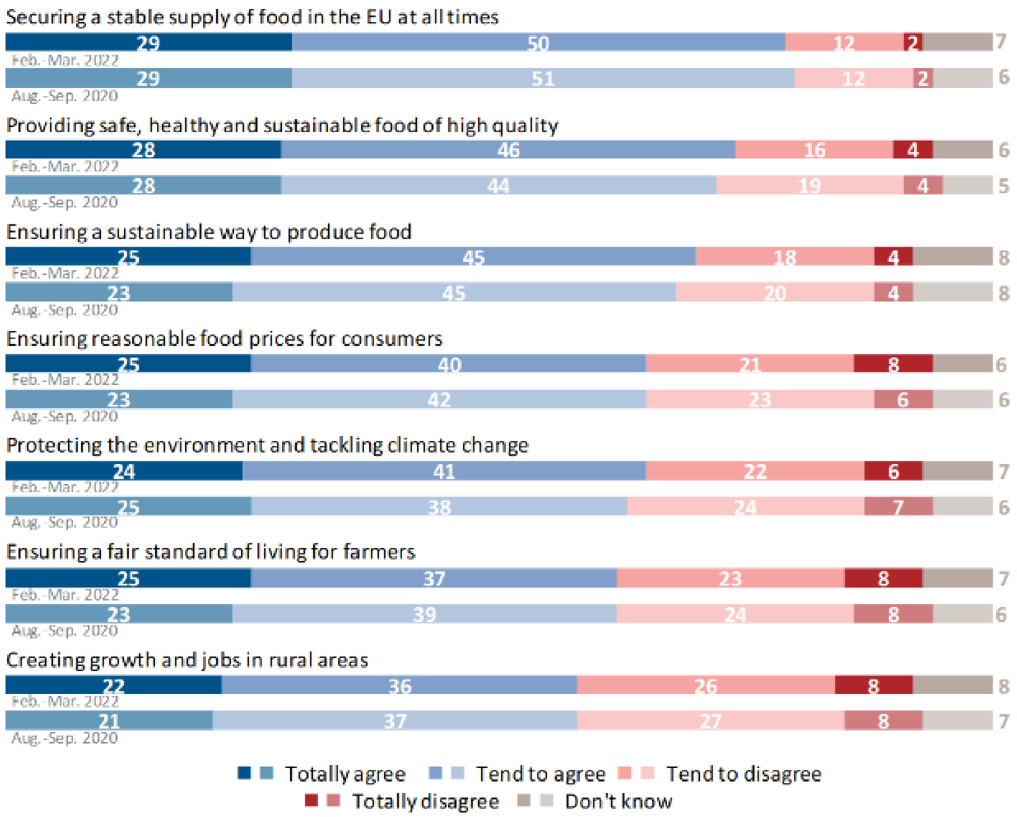
Close to eight in ten Europeans consider that the European Union through the Common Agricultural Policy is fulfilling its role in securing a stable supply of food in the EU at all times

When asked to what extent they think the European Union through the common agricultural policy is fulfilling its role in seven fields[25], respondents provide the following answers:

- Nearly eight in ten Europeans (79%, -1 percentage point since 2020) think that the European Union is fulfilling its role in **'securing a stable supply of food in the EU at all times'**[26], with close to three in ten (29%, unchanged) who 'totally agree' and half (50%, -1) who 'tend to agree';
- Close to three-quarters of respondents (74%, +2) believe that the EU is fulfilling its role in **'providing safe, healthy and sustainable food of high quality'**[27] (with 28%, =, 'totally agree' and 46%, +2, 'tend to agree');
- Seven in ten Europeans (70%, +2) consider that the EU is fulfilling its role in **'ensuring a sustainable way to produce food'** (including 25%, +2, 'totally agree' and 45%, =, 'tend to agree');
- Close to two-thirds of respondents share this opinion for both **'ensuring reasonable food prices for consumers'** (65%, =, with 25%, +2, 'totally agree' and 40%, -2, 'tend to agree') and **'protecting the environment and tackling climate change'** (65%, +2, including 24%, -1, 'totally agree' and 41%, +3, 'tend to agree');
- A similar proportion consider that the EU is fulfilling its role in **'ensuring a fair standard of living for farmers'** (62%, =, with 25%, +2, 'totally agree' and 37%, -2, 'tend to agree');
- Almost six in ten Europeans (58%, =) think similarly about **'creating growth and jobs in rural areas'** (including 22%, +1, 'totally agree' and 36%, -1, 'tend to agree').

It is apparent that large majorities of Europeans think that the EU through the CAP is fulfilling its role in all seven areas tested. In addition, more than one in five respondents totally agree that the EU is fulfilling its role for each area.

QA5 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - EU)



[25] QA5. To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in .... 1. Ensuring a fair standard of living for farmers; 2. Creating growth and jobs in rural areas; 3. Ensuring reasonable food prices for consumers; 4. Securing a stable supply of food in the EU at all times; 5. Ensuring a sustainable way to produce food; 6. Protecting the environment and tackling climate change; 7. Providing safe, healthy and sustainable food of high quality. Totally agree, Tend to agree, Tend to disagree, Totally disagree, Don't know.

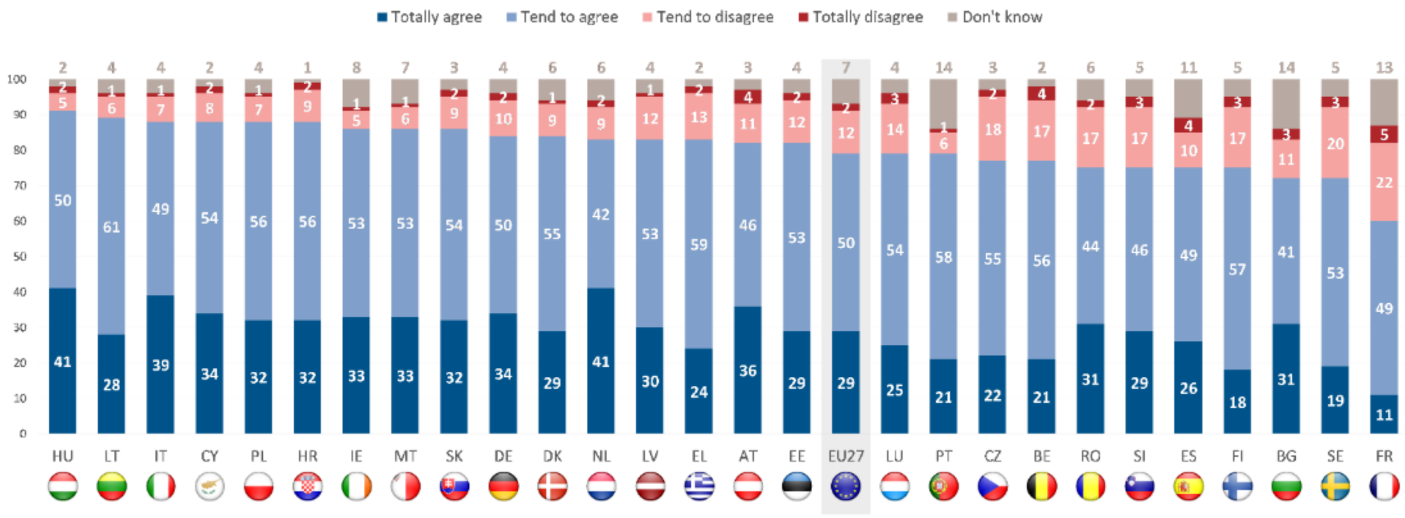
[26] This item has been modified since 2020: from 'Securing a stable supply of food in the EU' to 'Securing a stable supply of food in the EU at all times'

[27] This item has been modified since 2020: from 'Providing safe, healthy food of high quality' to 'Providing safe, healthy and sustainable food of high quality'

A national analysis shows that, in all 27 EU Member States, at least six in ten respondents consider that the EU through the CAP is fulfilling its role in **securing a stable supply of food in the EU at all times**, with the highest proportions in Hungary (91%), Lithuania (89%), and Italy, Poland, Croatia and Cyprus (all 88%). Meanwhile, fewer than three-quarters of respondents hold this view in France (60%), and Bulgaria and Sweden (both 72%).

In 24 countries, more than one in five respondents totally agree with this statement, particularly in the Netherlands and Hungary (both 41%), and Italy (39%).

QA5.4 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Securing a stable supply of food in the EU at all times)



Since 2020, belief that the EU, through the CAP, is fulfilling its role in **securing a stable supply of food in the EU at all times** has gained ground in 13 EU Member States, most notably in Italy (88%, +6 percentage points). It has lost ground in 11 countries, notably in Czechia (77%, -7) and France (60%, -6). The belief is unchanged in Cyprus, Germany, and Portugal.

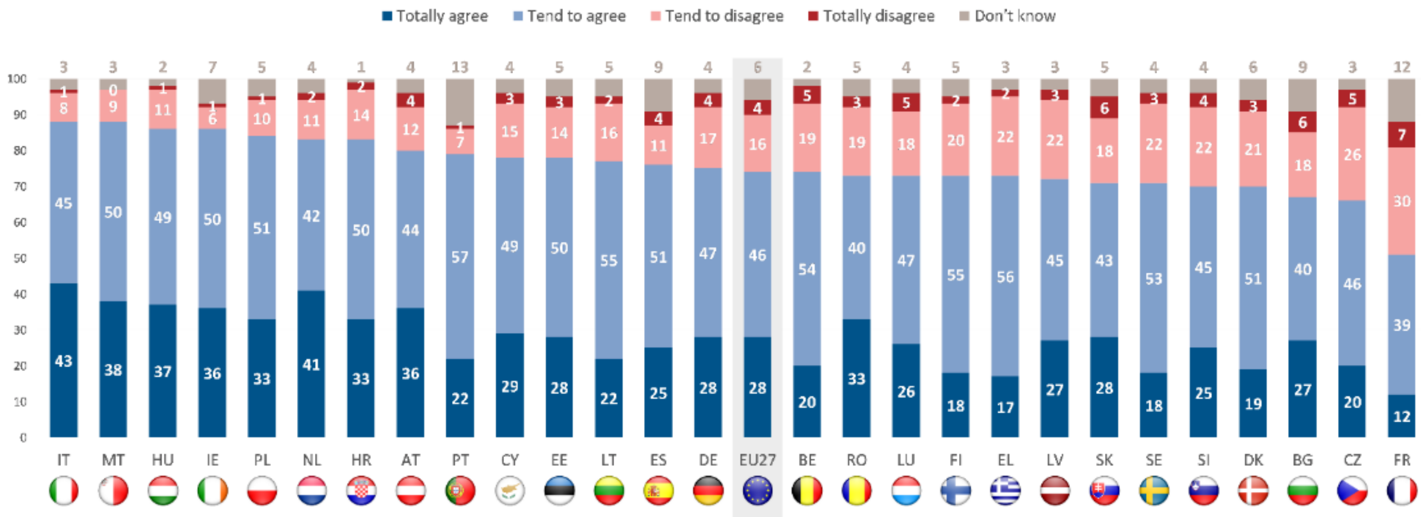
QA5.4 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Securing a stable supply of food in the EU at all times (%)

		EU27	IT	BG	HR	LV	MT	BE	LT	PL	SK	DK	EL	ES	HU	DE	CY	PT	SI	RO	LU	NL	AT	SE	EE	IE	FI	FR	CZ
Total 'Agree'	Feb/Mar 2022	79	88	72	88	83	86	77	89	88	86	84	83	75	91	84	88	79	75	75	79	83	82	72	82	86	75	60	77
	Δ Aug/Sep 2020	▼1	▲6	▲5	▲5	▲3	▲3	▲2	▲2	▲2	▲2	▲1	▲1	▲1	▲1	=	=	=	▼1	▼2	▼3	▼3	▼3	▼3	▼4	▼4	▼5	▼6	▼7
Total 'Disagree'	Feb/Mar 2022	14	8	14	11	13	7	21	7	8	11	10	15	14	7	12	10	7	20	19	17	11	15	23	14	6	20	27	20
	Δ Aug/Sep 2020	=	▼3	▼3	▼4	▲1	▲4	▼2	=	▼2	▼1	▲3	▲1	▼8	=	=	▲4	▼1	▲2	▲1	=	▲1	▲3	▼1	▲1	▼4	▲1	▲8	▲8
Don't know	Feb/Mar 2022	7	4	14	1	4	7	2	4	4	3	6	2	11	2	4	2	14	5	6	4	6	3	5	4	8	5	13	3

In all 27 EU Member States, more than half of respondents believe that the EU through the CAP is fulfilling its role in **providing safe, healthy and sustainable food of high quality**, with the highest levels in Italy and Malta (both 88%), and Hungary and Ireland (both 86%). At the other end of the scale, fewer than seven in ten respondents share this opinion in France (51%), Czechia (66%), and Bulgaria (67%).

In 22 EU Member States, at least one in five respondents totally agree with this idea, with the highest proportions in Italy (43%), the Netherlands (41%), and Malta (38%).

QA5.7 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Providing safe, healthy and sustainable food of high quality)



Since 2020, the share of respondents who agree that the CAP is fulfilling the EU's role in **providing safe, healthy and sustainable food of high quality** has increased in 16 EU Member States, most notably in Italy (88%, +9 percentage points), Croatia (83%, +9), and Bulgaria (67%, +9). Conversely, it has decreased in ten countries, notably in Cyprus (78%, -7). It is unchanged in Portugal.

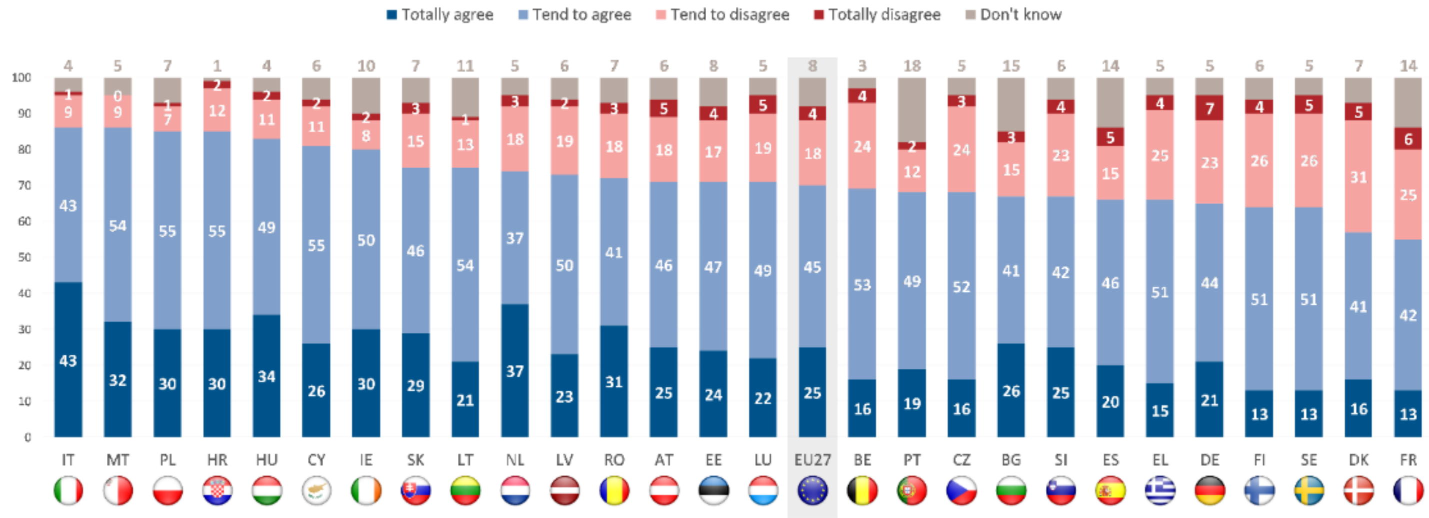
QA5.7 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Providing safe, healthy and sustainable food of high quality (%)

		EU27	BG	HR	IT	MT	SI	BE	ES	LV	LT	PL	SK	DE	EE	HU	LU	EL	PT	RO	SE	FR	NL	AT	FI	DK	IE	CZ	CY
Total 'Agree'	Feb/Mar 2022	74	67	83	88	88	70	74	76	72	77	84	71	75	78	86	73	73	79	73	71	51	83	80	73	70	86	66	78
	Δ Aug/Sep 2020	▲2	▲9	▲9	▲9	▲8	▲6	▲5	▲5	▲5	▲5	▲5	▲5	▲3	▲3	▲3	▲2	▲1	=	▼1	▼1	▼2	▼2	▼2	▼2	▼3	▼3	▼6	▼7
Total 'Disagree'	Feb/Mar 2022	20	24	16	9	9	26	24	15	25	18	11	24	21	17	12	23	24	8	22	25	37	13	16	22	24	7	31	18
	Δ Aug/Sep 2020	▼3	▼9	▼8	▼6	▲3	▼4	▼5	▼11	▼2	▼5	▼4	▼7	▼4	▼8	▼2	▼5	▼1	▼2	▲1	▼2	=	▲1	▲1	▼2	▲5	▼4	▲7	▲7
Don't know	Feb/Mar 2022	6	9	1	3	3	4	2	9	3	5	5	5	4	5	2	4	3	13	5	4	12	4	4	5	6	7	3	4

In all 27 EU Member States, more than half of respondents think that the EU, through the CAP, is fulfilling its role in **ensuring a sustainable way to produce food**, with the highest proportions in Italy and Malta (both 86%), and Poland and Croatia (both 85%), and the lowest in France (55%), Denmark (57%), and Finland and Sweden (both 64%).

In 19 EU Member States, at least one in five respondents 'totally agree' that the EU is fulfilling its role in ensuring a sustainable way to produce food, and more than a third in Italy (43%), the Netherlands (37%), and Hungary (34%).

QA5.5 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Ensuring a sustainable way to produce food)



Since 2020, **ensuring a sustainable way to produce food** is now mentioned more in 18 EU Member States, particularly in Belgium (69%, +11 percentage points) and Spain (66%, +10). However, it is cited slightly less in seven countries, most notably in Denmark (57%, -4 percentage points) and France (55%, -4). It is unchanged in Portugal and Sweden.

QA5.5 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Ensuring a sustainable way to produce food (%)

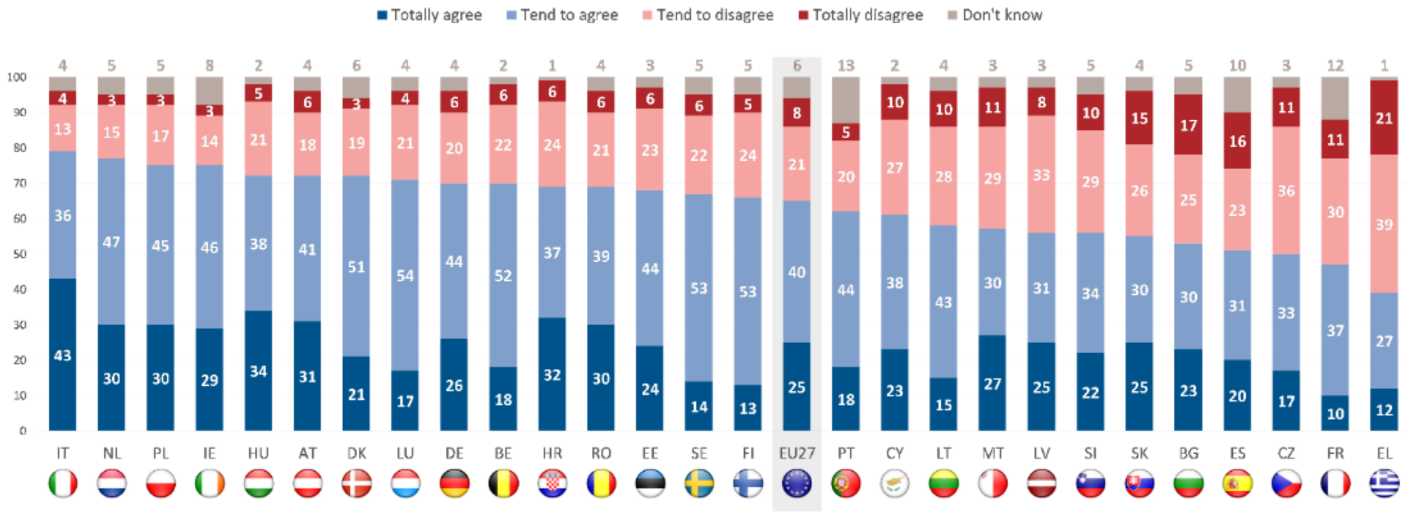
		EU27	BE	ES	BG	IE	HR	IT	MT	NL	LU	EL	LV	PL	EE	LT	SK	FI	DE	HU	PT	SE	CY	AT	SI	RO	CZ	DK	FR
Total 'Agree'	Feb/Mar 2022	70	69	66	67	80	85	86	86	74	71	66	73	85	71	75	75	64	65	83	68	64	81	71	67	72	68	57	55
	Δ Aug/Sep 2020	▲2	▲11	▲10	▲8	▲8	▲8	▲8	▲8	▲6	▲5	▲4	▲4	▲4	▲3	▲2	▲2	▲2	▲1	▲1	=	=	▼1	▼1	▼1	▼2	▼3	▼4	▼4
Total 'Disagree'	Feb/Mar 2022	22	28	20	18	10	14	10	9	21	24	29	21	8	21	14	18	30	30	13	14	31	13	23	27	21	27	36	31
	Δ Aug/Sep 2020	▼2	▼12	▼17	▼4	▼18	▼5	▼3	▲2	▼7	▼9	=	▲2	▼3	▼10	▼1	▼2	▼7	▼1	▲2	▼2	▼4	▲3	▼1	▲2	▲2	▲8	▲9	▲3
Don't know	Feb/Mar 2022	8	3	14	15	10	1	4	5	5	5	5	6	7	8	11	7	6	5	4	18	5	6	6	6	7	5	7	14

In 26 EU Member States, a majority or relative majority of respondents believe that the EU through the CAP is fulfilling its role in **ensuring reasonable food prices for consumers**. At least three-quarters of respondents hold this view in Italy (79%), the Netherlands (77%), and Poland and Ireland (both 75%). The gap is narrower in France (47% versus 41%), Czechia (50% vs 47%), and Spain (51% vs 39%).

In 18 countries, at least one in five respondents 'totally agree' with this idea, and more than three in ten in Italy (43%), significantly ahead of Hungary (34%), Croatia (32%), and Austria (31%).

Greece is the only EU Member State where only a minority of respondents agree that the EU is fulfilling its role in ensuring reasonable food prices for consumers (39% versus 60%).

QA5.3 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Ensuring reasonable food prices for consumers)



Belief that the EU, through the CAP, is fulfilling its role in **ensuring reasonable food prices for consumers** has risen in 14 EU Member States since 2020, particularly in Malta (57%, +9 percentage points). Conversely, it has fallen in 12 countries, including by double digits in Cyprus (61%, -14), Czechia (50%, -13), and Greece (39%, -10). It is unchanged in Lithuania.

QA5.3 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Ensuring reasonable food prices for consumers (%)

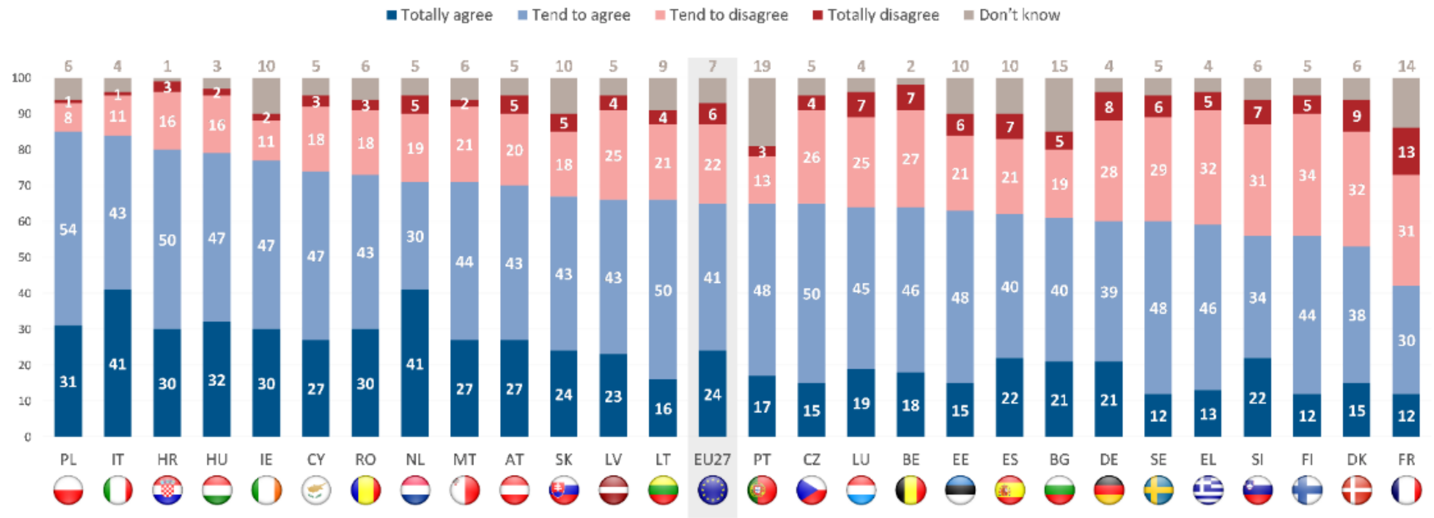
		EU27	MT	EE	BG	PL	BE	IT	NL	ES	HR	LU	HU	SI	DK	RO	LT	SE	DE	LV	AT	PT	FR	FI	IE	SK	EL	CZ	CY
Total 'Agree'	Feb/Mar 2022	65	57	68	53	75	70	79	77	51	69	71	72	56	72	69	58	67	70	56	72	62	47	66	75	55	39	50	61
	Δ Aug/Sep 2020	=	▲9	▲8	▲7	▲7	▲4	▲4	▲4	▲3	▲2	▲2	▲2	▲2	▲1	▲1	=	▼2	▼3	▼3	▼4	▼4	▼5	▼5	▼6	▼7	▼10	▼13	▼14
Total 'Disagree'	Feb/Mar 2022	29	40	29	42	20	28	17	18	39	30	25	26	39	22	27	38	28	26	41	24	25	41	29	17	41	60	47	37
	Δ Aug/Sep 2020	=	▲2	▼11	▼5	▼5	▼4	▼2	▼5	▼10	▼1	▼5	▼1	▼1	▲4	=	▲2	▼1	▲3	▲5	▲3	▲2	▲5	▲1	▼2	▲5	▲12	▲14	▲16
Don't know	Feb/Mar 2022	6	3	3	5	5	2	4	5	10	1	4	2	5	6	4	4	5	4	3	4	13	12	5	8	4	1	3	2

More than half of respondents in 26 EU Member States believe that the EU is fulfilling its role in **protecting the environment and tackling climate change**. At least eight in ten respondents agree with this statement in Poland (85%), Italy (84%), and Croatia (80%). This majority is smaller in Denmark (53% versus 41%), Finland (56% vs 39%), and Slovenia (56% vs 38%).

16 countries have more than one in five respondents who 'totally agree' that the EU is fulfilling its role in protecting the environment and tackling climate change, with the highest figures in Italy and the Netherlands (both 41%), and Hungary (32%).

However, only a minority of respondents in France agree with this idea (42% versus 44%).

QA5.6 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Protecting the environment and tackling climate change)



Agreement that the EU, through the CAP, is fulfilling its role in **protecting the environment and tackling climate change** has gained ground in 18 EU Member States since 2020, including by double digits in Ireland (77%, +15 percentage points) and Belgium (64%, +15). Conversely, it has lost ground in eight countries, most notably in Greece (59%, -6). It is unchanged in Hungary.

QA5.6 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Protecting the environment and tackling climate change (%)

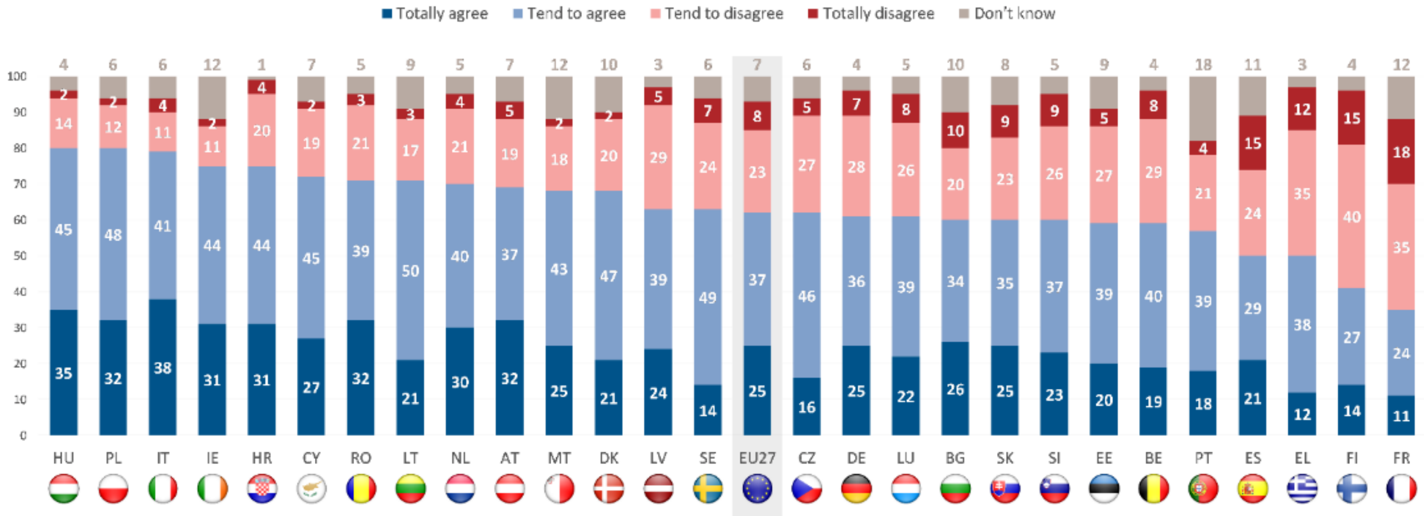
		EU27	BE	IE	ES	HR	IT	LU	BG	NL	PL	LV	FI	SE	PT	RO	LT	DE	EE	MT	HU	SK	AT	SI	DK	FR	CY	CZ	EL
Total 'Agree'	Feb/Mar 2022	65	64	77	62	80	84	64	61	71	85	66	56	60	65	73	66	60	63	71	79	67	70	56	53	42	74	65	59
	Δ Aug/Sep 2020	▲2	▲15	▲15	▲9	▲9	▲7	▲7	▲6	▲6	▲6	▲5	▲5	▲4	▲3	▲3	▲2	▲1	▲1	▲1	=	▼1	▼2	▼2	▼3	▼3	▼4	▼5	▼6
Total 'Disagree'	Feb/Mar 2022	28	34	13	28	19	12	32	24	24	9	29	39	35	16	21	25	36	27	23	18	23	25	38	41	44	21	30	37
	Δ Aug/Sep 2020	▼3	▼15	▼25	▼16	▼7	▼4	▼10	▼6	▼8	▼7	=	▼9	▼8	▼5	▼3	▼2	▼2	▼11	▲7	▲2	▼3	▲1	▲2	▲7	▲1	▲5	▲8	▲6
Don't know	Feb/Mar 2022	7	2	10	10	1	4	4	15	5	6	5	5	5	19	6	9	4	10	6	3	10	5	6	6	14	5	5	4

In 25 EU Member States, at least half of respondents think that the EU is fulfilling its role in **ensuring a fair standard of living for farmers** through the CAP. More than three-quarters of respondents hold this view in Poland and Hungary (both 80%), and Italy (79%). This majority is smaller in Spain (50% versus 39%), Greece (50% vs 47%), and Portugal (57% vs 25%).

At least one in five respondents 'totally agree' with this idea in 20 countries, with the highest figures in Italy (38%), Hungary (35%), and Poland, Romania and Austria (all 32%).

Meanwhile, only a minority of respondents agree that the EU is fulfilling its role in ensuring a fair standard of living for farmers in France (35% versus 53%) and Finland (41% vs 55%).

QA5.1 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Ensuring a fair standard of living for farmers)



Since 2020, belief that the EU, through the CAP, is fulfilling its role in **ensuring a fair standard of living for farmers** has increased in 15 EU Member States, most dramatically in Malta (68%, +18 percentage points). Meanwhile, it has decreased in nine countries, most strikingly in Finland (41%, -18). It is unchanged in Cyprus, Lithuania, and Romania.

QA5.1 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Ensuring a fair standard of living for farmers (%)

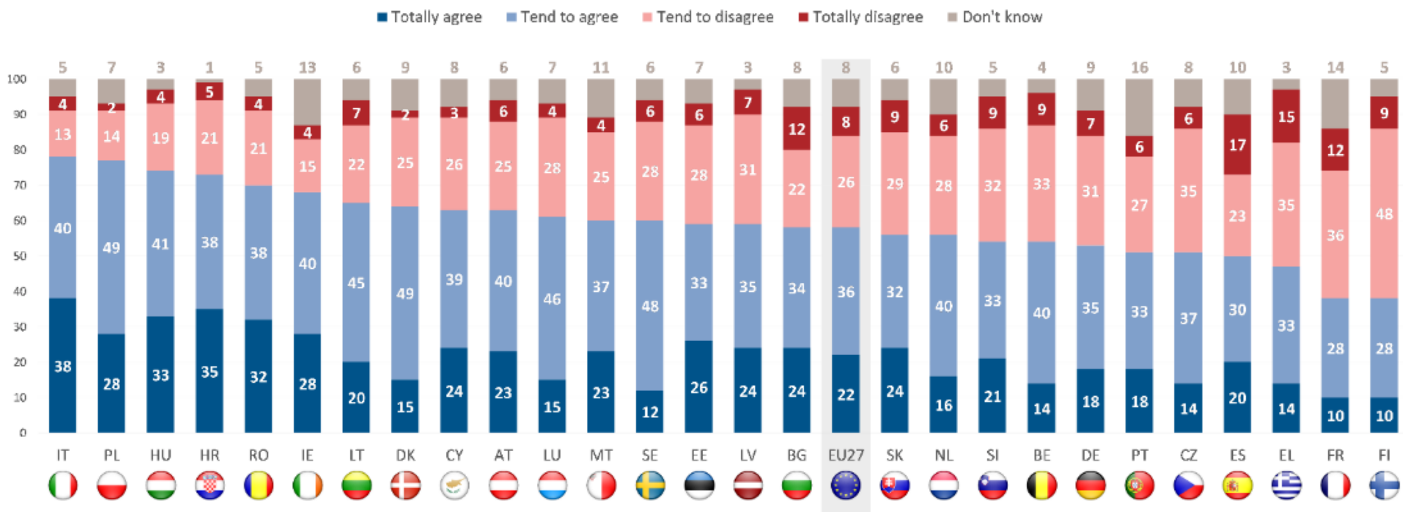
		EU27	MT	EE	HR	BG	IT	LV	SI	BE	DK	ES	HU	PL	IE	NL	PT	CY	LT	RO	LU	SK	DE	AT	EL	CZ	FR	SE	FI
Total 'Agree'	Feb/Mar 2022	62	68	59	75	60	79	63	60	59	68	50	80	80	75	70	57	72	71	71	61	60	61	69	50	62	35	63	41
	Δ Aug/Sep 2020	=	▲18	▲8	▲8	▲7	▲7	▲6	▲6	▲5	▲4	▲3	▲3	▲3	▲2	▲2	▲2	=	=	=	▼1	▼1	▼2	▼2	▼3	▼7	▼8	▼8	▼18
Total 'Disagree'	Feb/Mar 2022	31	20	32	24	30	15	34	35	37	22	39	16	14	13	25	25	21	20	24	34	32	35	24	47	32	53	31	55
	Δ Aug/Sep 2020	▼1	▼11	▼16	▼6	▼6	▼6	▼1	▼4	▼7	▲2	▼11	▼2	▼3	▼14	▼3	▼4	▲2	▼1	=	▼3	▼1	▲2	=	▲5	▲10	▲7	▲3	▲15
Don't know	Feb/Mar 2022	7	12	9	1	10	6	3	5	4	10	11	4	6	12	5	18	7	9	5	5	8	4	7	3	6	12	6	4

At least half of respondents believe that the EU is fulfilling its role in **creating growth and jobs in rural areas** in 24 EU Member States. More than seven in ten respondents share this opinion in Italy (78%), Poland (77%), Hungary (74%), and Croatia (73%), compared with narrower majorities in Spain (50% versus 40%), Czechia (51% vs 41%), and Portugal (51% vs 33%).

In 16 countries, at least one in five respondents 'totally agree' with this view, and at least a third in Italy (38%), Croatia (35%) and Hungary (33%).

Conversely, only a minority of respondents consider that the EU through the CAP is fulfilling its role in creating growth and jobs in rural areas in France (38% versus 48%), Finland (38% vs 57%), and Greece (47% vs 50%).

QA5.2 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
(% - Creating growth and jobs in rural areas)



Since 2020, belief that the EU, through the CAP, is fulfilling its role in **creating growth and jobs in rural areas** has risen in 17 countries, including by double digits in Malta (60%, +18 percentage points) and Estonia (59%, +14). It has fallen in nine countries, most dramatically in Czechia (51%, -11). It is unchanged in Romania.

QA5.2 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Creating growth and jobs in rural areas (%)

		EU27	MT	EE	BE	BG	HR	IT	LU	NL	DK	IE	LT	ES	LV	PL	SI	HU	PT	RO	CY	SE	EL	DE	FR	AT	SK	FI	CZ
Total 'Agree'	Feb/Mar 2022	58	60	59	54	58	73	78	61	56	64	68	65	50	59	77	54	74	51	70	63	60	47	53	38	63	56	38	51
	Δ Aug/Sep 2020	=	▲18	▲14	▲7	▲6	▲6	▲6	▲5	▲5	▲4	▲4	▲4	▲3	▲3	▲3	▲3	▲2	▲1	=	▼1	▼1	▼3	▼4	▼4	▼4	▼4	▼9	▼11
Total 'Disagree'	Feb/Mar 2022	34	29	34	42	34	26	17	32	34	27	19	29	40	38	16	41	23	33	25	29	34	50	38	48	31	38	57	41
	Δ Aug/Sep 2020	▼1	▼13	▼21	▼9	▼6	▼5	▼3	▼11	▼8	▲4	▼17	▼3	▼10	▲1	▼3	▼2	=	▼4	=	▲4	▼3	▲3	▲2	▲3	▲3	▲3	▲5	▲13
Don't know	Feb/Mar 2022	8	11	7	4	8	1	5	7	10	9	13	6	10	3	7	5	3	16	5	8	6	3	9	14	6	6	5	8

The socio-demographic data reveal that:

- Respondents aged 15-24 are the least likely to agree that the European Union through the CAP is fulfilling its role in **ensuring a fair standard of living for farmers** (57%, compared with 61%-62% among all other age groups);
- Europeans who left school between 16-19 are the most likely to agree that the EU is fulfilling its role in the seven areas, most notably in **ensuring a sustainable way to produce food** (74% compared with 65% among those who continued in education up to age 20 or beyond), **protecting the environment and tackling climate change** (69% compared with 60%) and **creating growth and jobs in rural areas** (62%, compared with 53%);
- Manual workers are the most likely to consider that the EU is fulfilling its role in five areas: in **providing safe, healthy and sustainable food of high quality** (77%, compared with 70% among unemployed people), **ensuring a sustainable way to produce food** (73%, compared with 65% among managers), **protecting the environment and tackling climate change** (69%, same score as among self-employed people, compared with 55% among unemployed people), **ensuring a fair standard of living for farmers** (65%, compared with 51% among unemployed people), **creating growth and jobs in rural areas** (62%, compared with 52% among unemployed people). However, managers are the most likely to agree that the EU is fulfilling its role in the two other areas, **securing a stable supply of food in the EU at all times** (84%, compared with 73% among house persons and unemployed people) and **ensuring reasonable food prices for consumers** (68%, compared with 57% among unemployed people);
- Respondents living in a large town are the most likely to agree that the EU is fulfilling its role in **securing a stable supply of food in the EU at all times** (82%, compared with 77% of respondents living in rural villages).

Moreover, Europeans who have a positive image of the EU are the most likely to agree that the European Union, through the CAP, is fulfilling its role in the seven areas, most notably in **providing safe, healthy and sustainable food of high quality** (80%, compared with 57% among those who have a negative image of the EU).

Similarly, respondents who believe that agriculture and rural areas are important for the future in the EU are the most likely to agree that the EU is fulfilling its role in the seven areas, particularly in **securing a stable supply of food in the EU at all times** (80%, compared with 64% among those who think that agriculture and rural areas are not important) and **ensuring a sustainable way to produce food** (71%, compared with 55%).

Respondents who believe the CAP benefits all Europeans are the most likely to agree that the EU is fulfilling its role in the seven areas, most notably in **ensuring a sustainable way to produce food** (77%, compared with 51% among those who disagree that the CAP benefits all Europeans), **providing safe, healthy and sustainable food of high quality** (81%, compared with 56%) and **protecting the environment and tackling climate change** (72% compared with 47%).

QA5 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...? (% - EU)

	Ensuring a fair standard of living for farmers		Creating growth and jobs in rural areas		Ensuring reasonable food prices for consumers		Securing a stable supply of food in the EU at all times		Ensuring a sustainable way to produce food		Protecting the environment and tackling climate change		Providing safe, healthy and sustainable food of high quality	
	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'
EU27	62	31	58	34	65	29	79	14	70	22	65	28	74	20
Age														
15-24	57	33	57	33	67	26	79	13	69	22	64	28	75	18
25-39	62	32	59	33	66	29	80	14	70	23	64	30	75	20
40-54	61	33	57	36	64	31	80	15	70	23	66	28	75	20
55 +	62	30	58	33	64	30	78	14	71	20	66	26	73	21
Education (End of)														
15-	61	27	59	30	61	29	77	12	71	16	68	20	75	16
16-19	64	30	62	31	66	30	81	14	74	19	69	25	76	19
20+	58	36	53	39	63	31	78	16	65	28	60	34	71	23
Still studying	56	35	56	34	67	25	80	13	69	23	61	31	75	18
Socio-professional category														
Self-employed	62	33	57	37	63	32	78	16	71	23	69	26	73	22
Managers	60	36	54	40	68	28	84	13	65	31	63	33	74	22
Other white collars	64	30	58	34	66	29	81	14	70	23	67	27	76	19
Manual workers	65	29	62	30	66	29	80	14	73	19	69	25	77	18
House persons	60	28	57	29	59	30	73	16	70	16	67	21	72	18
Unemployed	51	40	52	39	57	38	73	19	68	23	55	36	70	22
Retired	61	31	58	33	63	30	78	14	70	20	64	27	73	21
Students	56	35	56	34	67	25	80	13	69	23	61	31	75	18
Subjective urbanisation														
Rural village	61	31	57	34	63	30	77	15	70	21	65	26	75	18
Small/ mid size town	60	33	57	35	64	30	79	15	69	23	65	28	74	20
Large town	64	30	59	33	66	29	82	12	70	23	65	29	76	20
Image of the EU														
Total 'Positive'	66	28	62	30	70	25	85	10	76	18	70	24	80	16
Neutral	60	32	58	33	63	30	78	14	69	22	65	27	73	20
Total 'Negative'	47	46	42	50	50	44	64	29	55	36	50	43	57	36
View on agriculture and rural areas in EU														
Important	62	31	58	34	65	29	80	13	71	21	65	28	75	19
Not Important	54	40	52	41	57	39	64	30	55	38	58	36	63	33
Common Agricultural Policy (CAP) benefits citizens														
Agree	68	28	64	30	70	26	85	11	77	18	72	23	81	15
Disagree	44	50	41	52	49	46	62	31	51	42	47	47	56	39

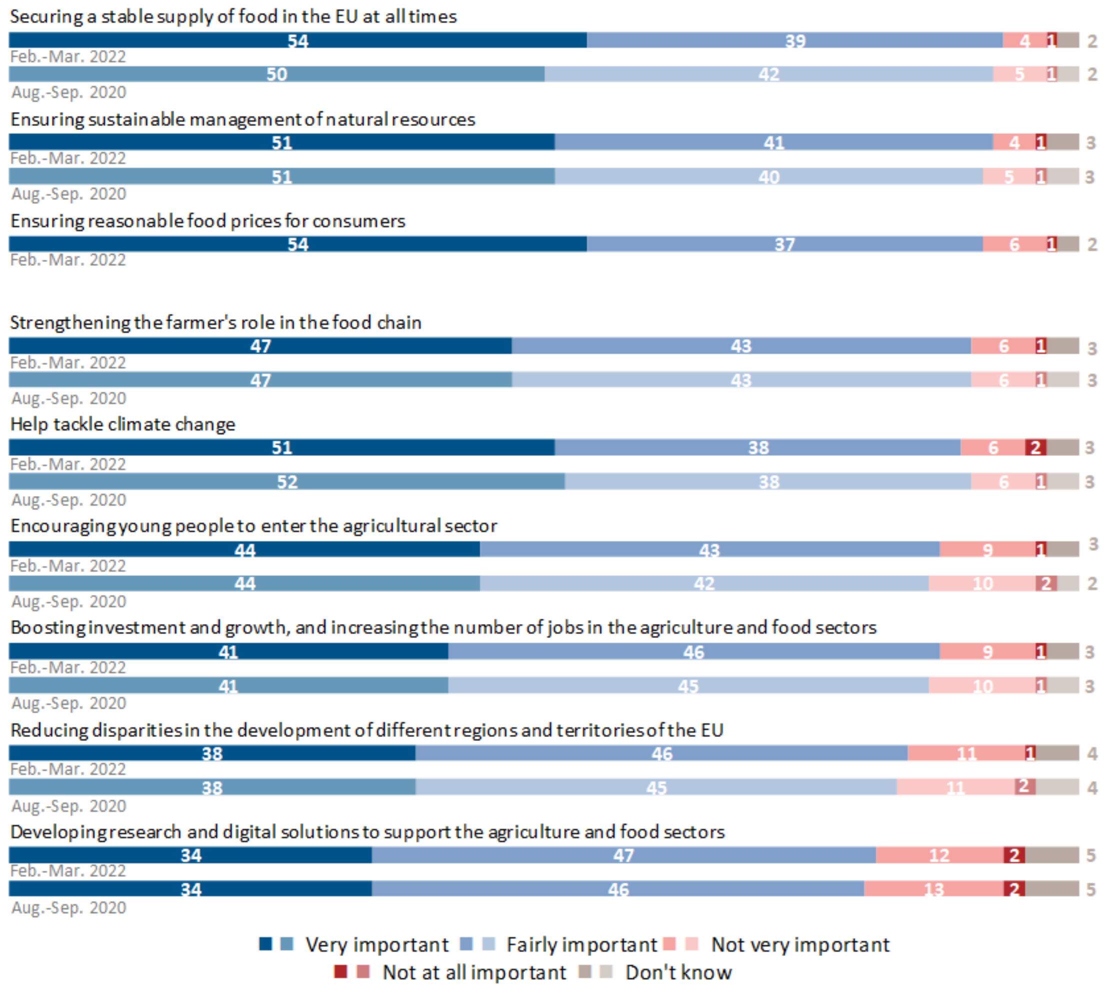
3. The perceived importance of CAP priorities

More than eight in ten Europeans think that the nine CAP priorities tested are important

When asked how important they think nine priorities of the common agricultural policy are[28], large majorities of respondents say each priority is important:

- At least nine in ten Europeans consider that four in nine priorities of the CAP are important: **'securing a stable supply of food in the EU at all times'**[29] (93%, +1 percentage point since 2020, including 54%, +4, 'very important'), **'ensuring sustainable management of natural resources'** (92%, +1, including 51%, unchanged, 'very important'), **'ensuring reasonable food prices for consumers'** (91%, with 54% 'very important')[30], and **'strengthening the farmer's role in the food chain'** (90%, =, with 47%, =, 'very important');
- More than eight in ten respondents hold this view about the five other CAP priorities: **'help tackle climate change'** (89%, -1 percentage point, including 51%, -1, 'very important'), **'encouraging young people to enter the agricultural sector'** (87%, +1, with 44%, unchanged, 'very important'), **'boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors'** (87%, +1, including 41%, =, 'very important'), **'reducing disparities in the development of different regions and territories of the EU'** (84%, +1, with 38%, =, 'very important'), and **'developing research and digital solutions to support the agriculture and food sectors'** (81%, +1, including 34%, =, 'very important').

QA7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - EU)



[28] QA7. How important do you think the following priorities of the Common Agricultural Policy (CAP) are? 1. Developing research and digital solutions to support the agriculture and food sectors; 2. Strengthening the farmer's role in the food chain; 3. Encouraging young people to enter the agricultural sector: 4. Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors; 5. Help tackle climate change; 6. Securing a stable supply of food in the EU at all times; 7. Ensuring reasonable food prices for consumers; 8. Ensuring sustainable management of natural resources; 9. Reducing disparities in the development of different regions and territories of the EU. Very important, Fairly important, Not very important, Not at all important, Don't know.

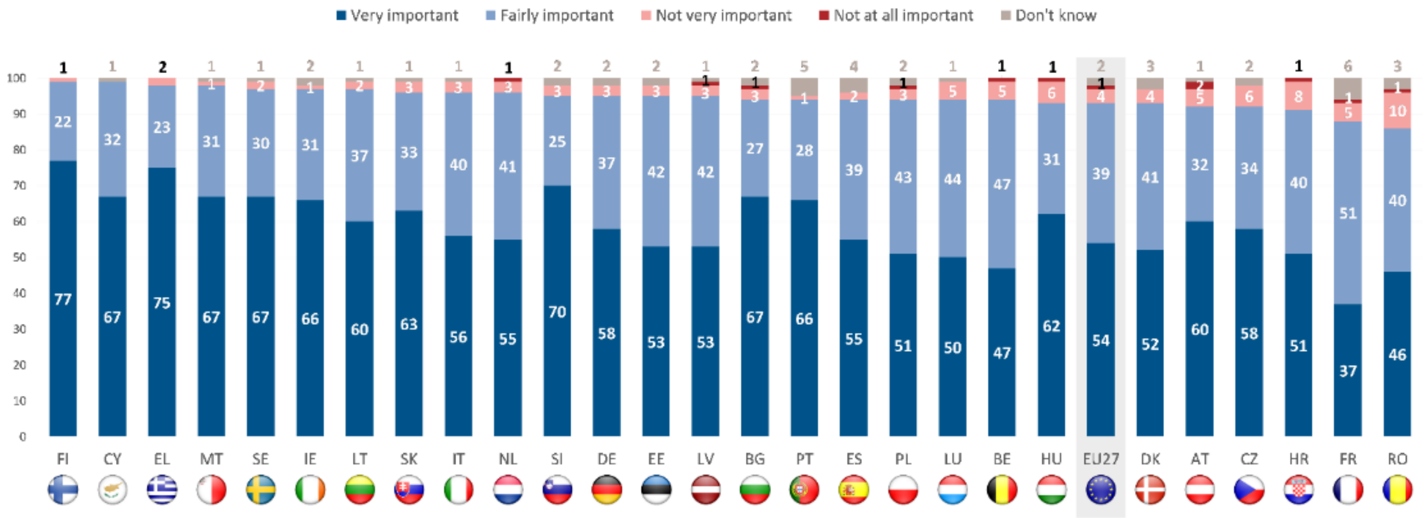
[29] This item has been modified since 2020: from 'Securing a stable supply of food in the EU' to 'Securing a stable supply of food in the EU at all times'

[30] This item has been asked for the first time in this survey.

In all 27 EU Member States, more than eight in ten respondents consider that **securing a stable supply of food in the EU at all times** is an important priority of the CAP, with the highest levels in Finland and Cyprus (both 99%), and Greece and Malta (98%), and the lowest in Romania (86%), France (88%), and Croatia (91%).

In 24 countries, at least half of respondents say securing a stable supply of food in the EU at all times is a 'very important' priority of the CAP, and at least seven in ten in Finland (77%), Greece (75%), and Slovenia (70%).

QA7.6 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Securing a stable supply of food in the EU at all times)



Since 2020, the proportion of respondents who consider that **securing a stable supply of food in the EU at all times** is an important priority of the CAP has increased in 18 EU Member States, particularly in Finland (99%, +5 percentage points), Malta (98%, +5), and Italy (96%, +5). Conversely, it has decreased in Portugal (94%, -4) and Luxembourg (94%, -2). It is unchanged in seven countries.

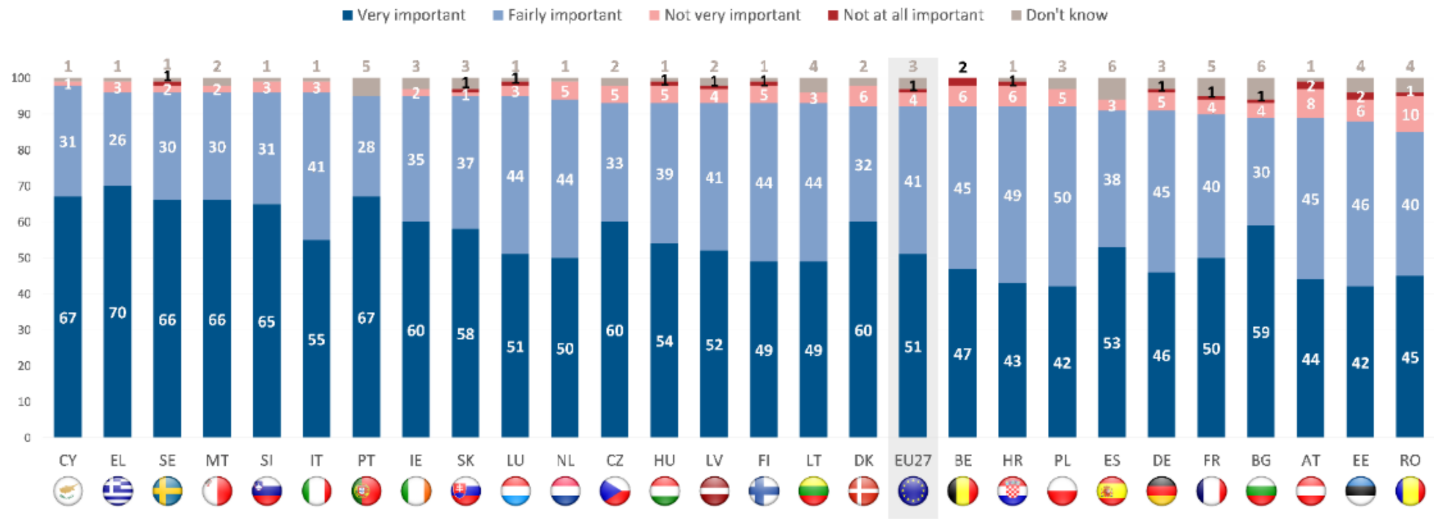
QA7.6 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Securing a stable supply of food in the EU at all times (%)

		EU27	IT	MT	FI	LV	CY	PL	BG	ES	AT	CZ	DE	IE	EL	HR	LT	HU	SK	SE	BE	DK	EE	FR	NL	RO	SI	LU	PT
Total 'Important'	Feb/Mar 2022	93	96	98	99	95	99	94	94	94	92	92	95	97	98	91	97	93	96	97	94	93	95	88	96	86	95	94	94
	Δ Aug/Sep 2020	▲1	▲5	▲5	▲5	▲4	▲3	▲3	▲2	▲2	▲2	▲1	▲1	▲1	▲1	▲1	▲1	▲1	▲1	▲1	=	=	=	=	=	=	=	▼2	▼4
Total 'Not important'	Feb/Mar 2022	5	3	1	1	4		4	4	2	7	6	3	1	2	9	2	7	3	2	6	4	3	6	4	11	3	5	1
	Δ Aug/Sep 2020	▼1	▼3	=	▼5	▼3	▼4	▼3	=	▼4	▼2	▼1	▼2	▼3	=	▼1	▼1	=	▼1	▼1	▲1	=	▼2	▼1	=	=	▼1	▲1	=
Don't know	Feb/Mar 2022	2	1	1	0	1	1	2	2	4	1	2	2	2	0	0	1	0	1	1	0	3	2	6	0	3	2	1	5

More than eight in ten respondents believe that **ensuring sustainable management of natural resources** is an important CAP priority in all 27 EU Member States, with the highest proportions in Cyprus (98%), and Italy, Greece, Malta, Slovenia and Sweden (96% in the five countries). At the other end of the scale, fewer than nine in ten respondents share this opinion in Romania (85%), Estonia (88%), and Bulgaria and Austria (both 89%).

At least one in two respondents considers that this priority is 'very important' in 18 EU Member States, and more than two-thirds in Greece (70%), and Portugal and Cyprus (both 67%).

QA7.8 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Ensuring sustainable management of natural resources)



Since 2020, the proportion of respondents who consider that **ensuring sustainable management of natural resources** is an important CAP priority has increased by no more than four percentage points in 12 EU Member States, with the highest figures in Italy and Malta (96%, +4 percentage points in both countries), Croatia (92%, +4), and Austria (89%, +4). Meanwhile, it has decreased in nine countries, most notably in Estonia (88%, -5). It is unchanged in six countries.

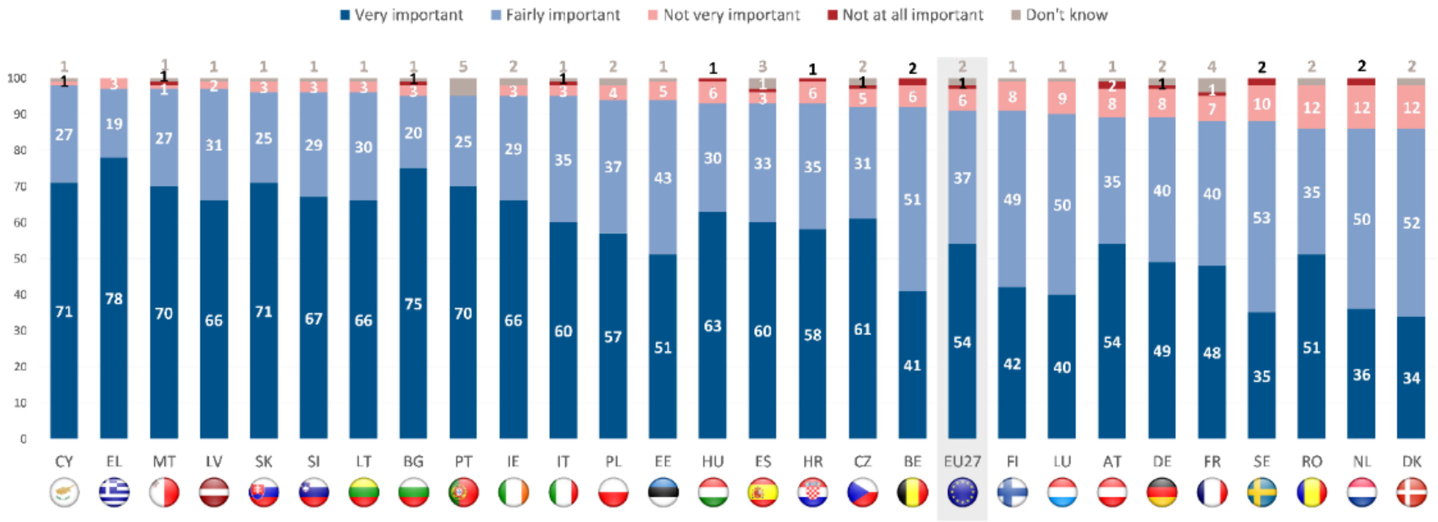
QA7.8 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Ensuring sustainable management of natural resources (%)

		EU27	HR	IT	MT	AT	CZ	RO	SI	CY	LV	LT	HU	SK	DK	IE	EL	FR	LU	NL	BG	DE	ES	SE	PL	FI	BE	PT	EE
Total 'Important'	Feb/Mar 2022	92	92	96	96	89	93	85	96	98	93	93	93	95	92	95	96	90	95	94	89	91	91	96	92	93	92	95	88
	Δ Aug/Sept 2020	▲1	▲4	▲4	▲4	▲4	▲3	▲3	▲3	▲2	▲2	▲1	▲1	▲1	=	=	=	=	=	=	▼1	▼1	▼1	▼1	▼2	▼2	▼3	▼3	▼5
Total 'Not important'	Feb/Mar 2022	5	7	3	2	10	5	11	3	1	5	3	6	2	6	2	3	5	4	5	5	6	3	3	5	6	8	0	8
	Δ Aug/Sept 2020	▼1	▼4	▼1	=	▼4	▼2	▼3	▼2	▼1	▼1	▼2	=	▼2	▲2	▼3	=	=	▼1	=	▲1	=	▼2	=	=	▲1	▲4	=	▲1
Don't know	Feb/Mar 2022	3	1	1	2	1	2	4	1	1	2	4	1	3	2	3	1	5	1	1	6	3	6	1	3	1	0	5	4
	Δ Aug/Sept 2020	=	=	▼3	▼4	=	▼1	=	▼1	▼1	▼1	▲1	▼1	▲1	▼2	▲3	=	=	▲1	=	=	▲1	▲3	▲1	▲2	▲1	▼1	▲3	▲4

More than eight in ten respondents in all 27 EU Member States consider that **ensuring reasonable food prices for consumers** is an important priority of the CAP, with the highest figures from respondents in Cyprus (98%), and Greece, Latvia and Malta (all 97%), and the lowest in Romania, the Netherlands, and Denmark (all 86%).

Over half of respondents believe that this priority of the CAP is 'very important' in 19 EU Member States, and more than seven in ten in Greece (78%), Bulgaria (75%), and Slovakia and Cyprus (both 71%).

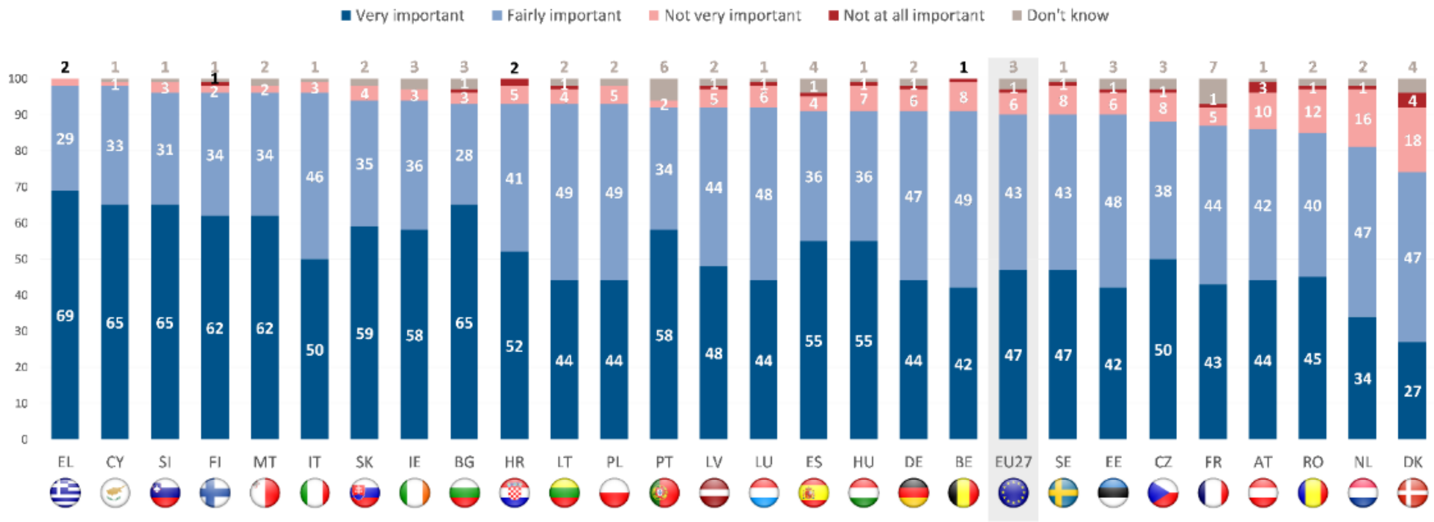
QA7.7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Ensuring reasonable food prices for consumers)



In all 27 EU Member States, more than seven in ten respondents think that **strengthening the farmer's role in the food chain** is an important priority of the CAP, with the highest scores in Greece and Cyprus (both 98%), and Italy, Malta, Slovenia and Finland (all 96%), and the lowest in Denmark (74%), the Netherlands (81%), and Romania (85%).

At least half of respondents believe that strengthening the farmer's role in the food chain is 'very important' in 14 countries, with the highest figures in Greece (69%), and Bulgaria, Slovenia and Cyprus (all 65%).

QA7.2 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Strengthening the farmer's role in the food chain)



Since 2020, the proportion of respondents who say **strengthening the farmer's role in the food chain** is an important priority of the CAP has risen in 17 EU Member States, particularly in Finland (96%, +5 percentage points). It has fallen in seven countries, most notably in Portugal (92%, -5). It is unchanged in Latvia, Spain, and Estonia.

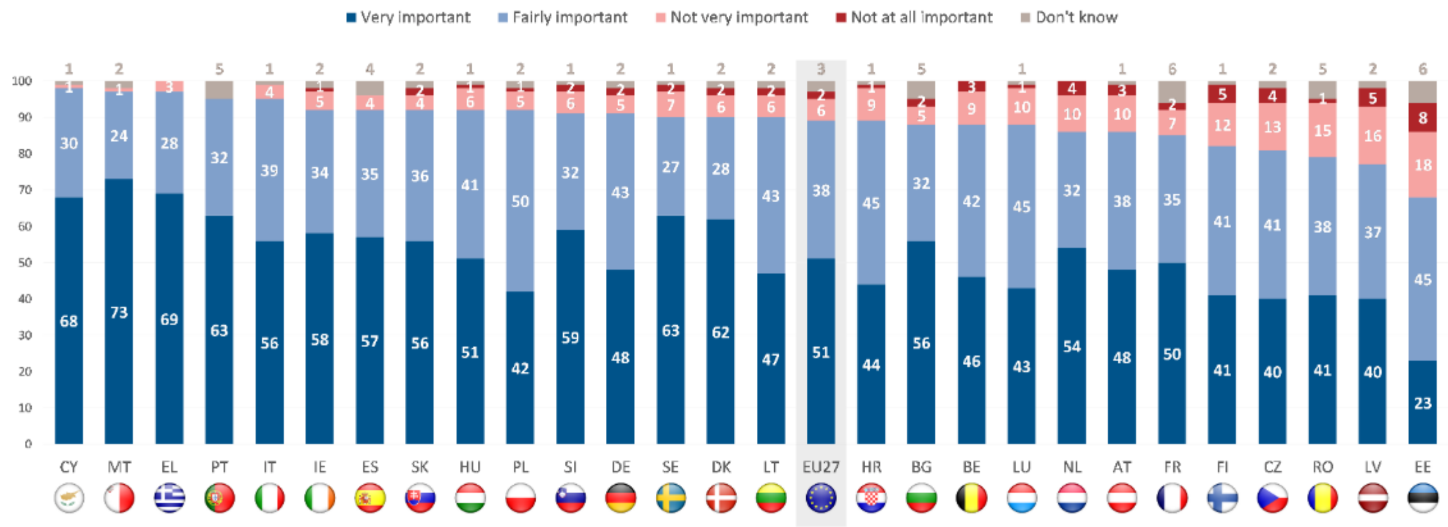
QA7.2 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Strengthening the farmer's role in the food chain (%)

		EU27	FI	CZ	IT	HR	CY	MT	NL	AT	DE	IE	EL	SI	BG	LT	LU	PL	RO	EE	ES	LV	BE	HU	SK	SE	FR	DK	PT
Total 'Important'	Feb/Mar 2022	90	96	88	96	93	98	96	81	86	91	94	98	96	93	93	92	93	85	90	91	92	91	91	94	90	87	74	92
	Δ Aug/Sep 2020	=	▲5	▲4	▲4	▲3	▲3	▲3	▲3	▲3	▲2	▲2	▲2	▲2	▲1	▲1	▲1	▲1	▲1	=	=	=	▼1	▼1	▼1	▼1	▼2	▼4	▼5
Total 'Not important'	Feb/Mar 2022	7	3	9	3	7	1	2	17	13	7	3	2	3	4	5	7	5	13	7	5	6	9	8	4	9	6	22	2
	Δ Aug/Sep 2020	=	▼6	▼3	▼2	▼3	▼1	▲1	▼4	▼2	▼1	▼5	▼1	▼2	=	▼1	▼2	▼1	=	▼3	▼2	▲1	▲2	▲2	▲1	=	▲1	▲6	▲1
Don't know	Feb/Mar 2022	3	1	3	1	0	1	2	2	1	2	3	0	1	3	2	1	2	2	3	4	2	0	1	2	1	7	4	6

In all 27 EU Member States, more than two-thirds of respondents think that **helping tackle climate change** is an important priority of the CAP. Nearly all respondents share this opinion in Cyprus (98%), and Greece and Malta (both 97%), compared with fewer than eight in ten in Estonia (68%), Latvia (77%), and Romania (79%).

At least half of respondents believe that helping tackle climate change is a 'very important' CAP priority in 15 countries, and more than two-thirds in Malta (73%), Greece (69%), and Cyprus (68%).

QA7.5 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Help tackle climate change)



Since 2020, the belief that helping tackle climate change is an important CAP priority has gained ground in 11 EU Member States, most notably in Croatia (89%, +6 percentage points). Meanwhile, it has lost ground in ten countries, most notably in Estonia (68%, -5). It is unchanged in six countries.

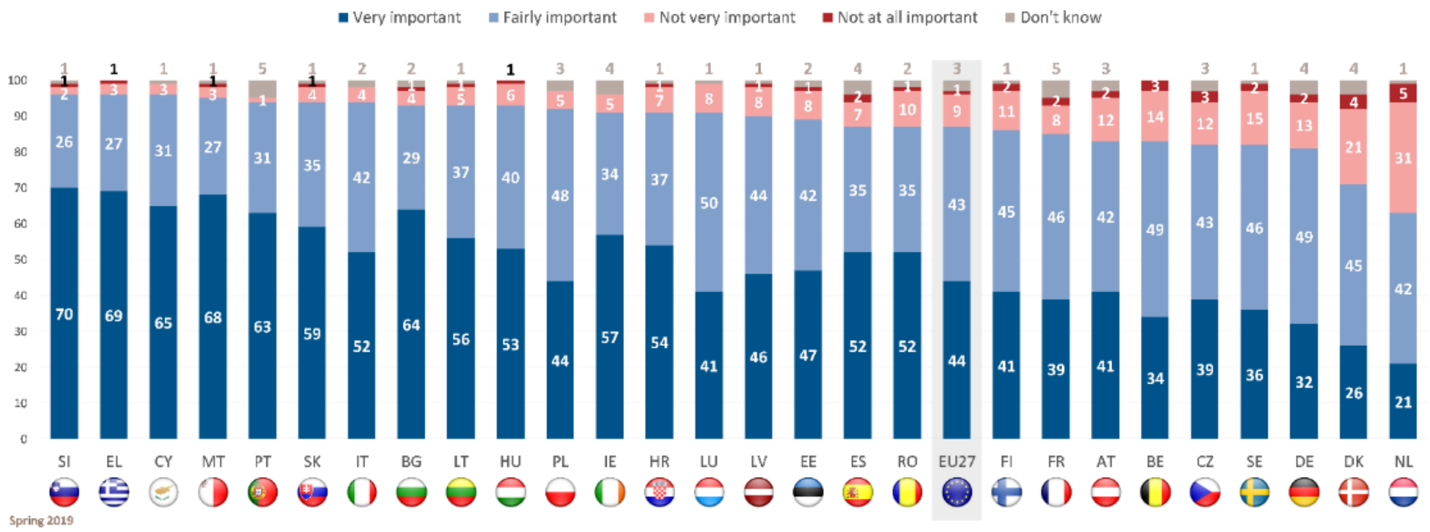
QA7.5 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Help tackle climate change (%)

		EU27	HR	MT	IT	DE	IE	CY	HU	SI	ES	LU	PL	BG	DK	EL	LV	LT	FI	AT	SE	CZ	PT	SK	BE	FR	NL	RO	EE
Total 'Important'	Feb/Mar 2022	89	89	97	95	91	92	98	92	91	92	88	92	88	90	97	77	90	82	86	90	81	95	92	88	85	86	79	68
	Δ Aug/Sep 2020	▼1	▲6	▲5	▲3	▲2	▲2	▲2	▲2	▲2	▲1	▲1	▲1	=	=	=	=	=	=	▼1	▼1	▼2	▼2	▼2	▼3	▼3	▼3	▼4	▼5
Total 'Not important'	Feb/Mar 2022	8	10	1	4	7	6	1	7	8	4	11	6	7	8	3	21	8	17	13	9	17		6	12	9	14	16	26
	Δ Aug/Sep 2020	▲1	▼6	▲1	=	▼2	▼4	▼2	▼1	▼1	▼4	▼2	=	=	▲2	▲1	▲4	▲1	▼1	▲1	=	▲4	▼1	▲2	▲4	▲2	▲3	▲3	▼1
Don't know	Feb/Mar 2022	3	1	2	1	2	2	1	1	1	4	1	2	5	2	0	2	2	1	1	1	2	5	2	0	6	0	5	6

In all 27 EU Member States, more than six in ten respondents believe that **encouraging young people to enter the agricultural sector** is an important priority of the CAP. This proportion ranges from 96% in Greece, Cyprus, and Slovenia to 63% in the Netherlands, 71% in Denmark, and 81% in Germany.

More than half of respondents in 14 EU Member States consider that encouraging young people to enter the agricultural sector is a 'very important' CAP priority, and more than two-thirds in Slovenia (70%), Greece (69%), and Malta (68%).

QA7.3 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Encouraging young people to enter the agricultural sector)



In 15 EU Member States, the share of respondents who say **encouraging young people to enter the agricultural sector** is an important priority of the CAP has increased slightly since 2020, with the biggest rises in Luxembourg (91%, +4 percentage points) and Austria (83%, +4). However, it has decreased slightly in six countries, most notably in Portugal (94%, -4). It is unchanged in six countries.

QA7.3 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Encouraging young people to enter the agricultural sector (%)

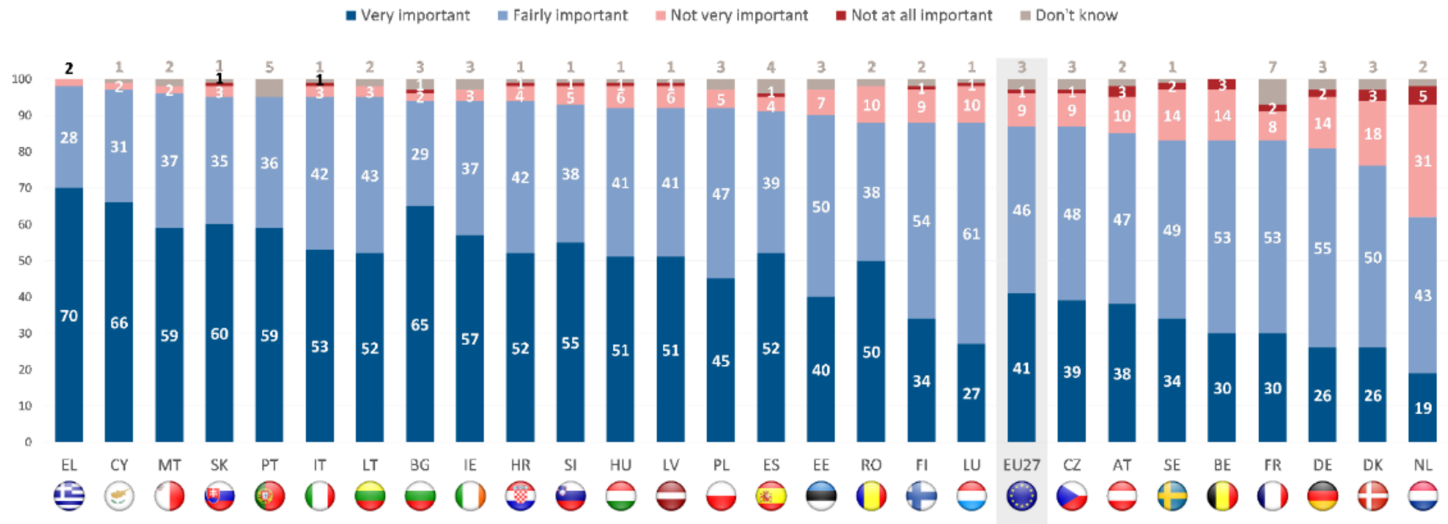
		EU27	LU	AT	IE	IT	LV	HU	MT	NL	PL	SI	BG	DE	CY
Total 'Important'	Feb/Mar 2022	87	91	83	91	94	90	93	95	63	92	96	93	81	96
	Δ Aug/Sep 2020	▲1	▲4	▲4	▲3	▲3	▲3	▲3	▲3	▲3	▲3	▲3	▲2	▲2	▲2
Total 'Not important'	Feb/Mar 2022	10	8	14	5	4	9	7	4	36	5	3	5	15	3
	Δ Aug/Sep 2020	▼2	▼5	▼5	▼7	▼2	▼2	▼1	▲2	▼3	▼4	▼3	▼1	▼3	▼2
Don't know	Feb/Mar 2022	3	1	3	4	2	1	0	1	1	3	1	2	4	1

		RO	HR	CZ	EL	ES	FR	SK	FI	BE	DK	LT	EE	SE	PT
Total 'Important'	Feb/Mar 2022	87	91	82	96	87	85	94	86	83	71	93	89	82	94
	Δ Aug/Sep 2020	▲2	▲1	=	=	=	=	=	=	▼1	▼1	▼1	▼2	▼2	▼4
Total 'Not important'	Feb/Mar 2022	11	8	15	4	9	10	5	13	17	25	6	9	17	1
	Δ Aug/Sep 2020	▼1	▼2	=	=	▼3	=	=	▼1	▲2	▲2	▲1	=	▲1	=
Don't know	Feb/Mar 2022	2	1	3	0	4	5	1	1	0	4	1	2	1	5

More than six in ten respondents in all 27 EU Member States think that **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors** is an important priority of the CAP, with the highest proportions in Greece (98%), Cyprus (97%), and Malta (96%), and the lowest in the Netherlands (62%), Denmark (76%), and Germany (81%).

In 15 countries, at least half of respondents say boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors is a 'very important' CAP priority, and more than six in ten in Greece (70%), Cyprus (66%), and Bulgaria (65%).

QA7.4 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors)



Since 2020, the belief that **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors** is an important priority of the CAP has gained ground in 17 EU Member States, most notably in Luxembourg (88%, +6 percentage points). Meanwhile, it has lost ground in four countries, particularly in Denmark (76%, -5) and Portugal (95%, -4). It remains unchanged in six countries.

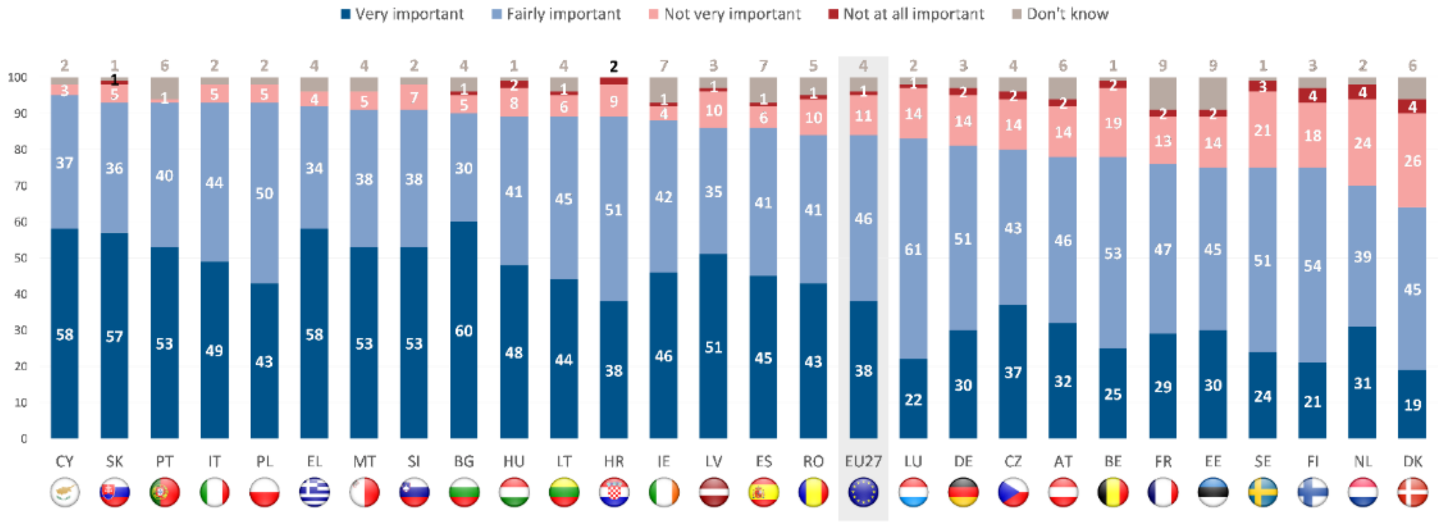
QA7.4 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors (%)

		EU27	LU	DE	AT	HR	MT	CZ	IT	NL	IE	EL	LT	HU	RO	FI	BG	FR	CY	BE	ES	LV	PL	SI	SE	EE	SK	PT	DK
Total 'Important'	Feb/Mar 2022	87	88	81	85	94	96	87	95	62	94	98	95	92	88	88	94	83	97	83	91	92	92	93	83	90	95	95	76
	Δ Aug/Sep 2020	▲1	▲6	▲5	▲5	▲4	▲4	▲3	▲3	▲3	▲2	▲2	▲2	▲2	▲2	▲2	▲1	▲1	▲1	=	=	=	=	=	=	▼1	▼1	▼4	▼5
Total 'Not important'	Feb/Mar 2022	10	11	16	13	5	2	10	4	36	3	2	3	7	10	10	3	10	2	17	5	7	5	6	16	7	4		21
	Δ Aug/Sep 2020	▼1	▼7	▼4	▼5	▼5	=	▼2	▼1	▼4	▼5	▼1	▼2	▼1	▼1	▼3	▼1	▼1	=	▲1	▼2	▲2	▼1	=	▼1	▼2	▲1	=	▲7
Don't know	Feb/Mar 2022	3	1	3	2	1	2	3	1	2	3	0	2	1	2	2	3	7	1	0	4	1	3	1	1	3	1	5	3

In all 27 EU Member States, more than six in ten respondents consider that **reducing disparities in the development of different regions and territories of the EU** is an important priority of the CAP. Respondents in Cyprus (95%), and Italy, Poland, Portugal and Slovakia (all 93%) are the most likely to share this opinion, while those in Denmark (64%), the Netherlands (70%), and Sweden, Finland and Estonia (all 75%) are the least likely to hold this view.

In eight countries, more than half of respondents believe that reducing disparities in the development of different regions and territories of the EU is a 'very important' priority of the CAP, with the highest levels in Bulgaria (60%), and Greece and Cyprus (both 58%).

QA7.9 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Reducing disparities in the development of different regions and territories of the EU)



Since 2020, the opinion that **reducing disparities in the development of different regions and territories of the EU** is an important priority of the CAP has gained ground in 15 EU Member States, including by double digits in Malta (91%, +10 percentage points). However, it has lost ground in nine countries, most dramatically in Estonia (75%, -10). It remains unchanged in Poland, Bulgaria, and Sweden.

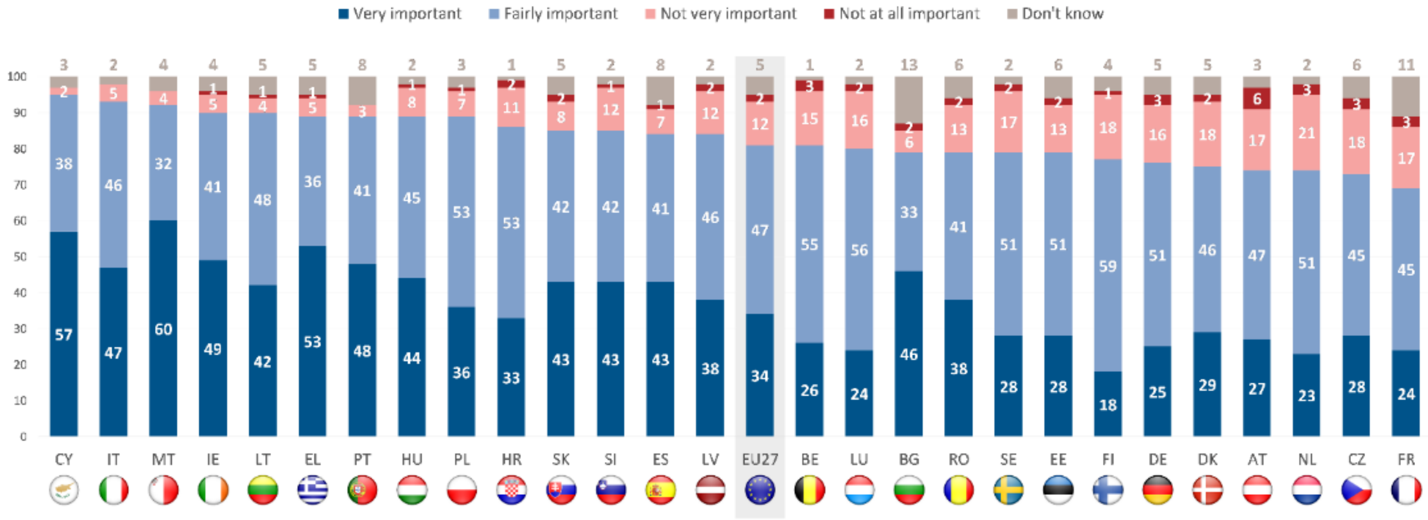
QA7.9 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Reducing disparities in the development of different regions and territories of the EU (%)

		EU27	MT	CY	LU	HR	DE	IT	LV	SI	CZ	IE	EL	ES	AT	RO	FI	BG	PL	SE	FR	LT	HU	PT	SK	NL	BE	DK	EE
Total 'Important'	Feb/Mar 2022	84	91	95	83	89	81	93	86	91	80	88	92	86	78	84	75	90	93	75	76	89	89	93	93	70	78	64	75
	Δ Aug/Sept 2020	▲1	▲10	▲9	▲8	▲6	▲5	▲3	▲3	▲2	▲1	▲1	▲1	▲1	▲1	▲1	▲1	=	=	=	▼1	▼1	▼1	▼1	▼2	▼3	▼4	▼6	▼10
Total 'Not important'	Feb/Mar 2022	12	5	3	15	11	16	5	11	7	16	5	4	7	16	11	22	6	5	24	15	7	10	1	6	28	21	30	16
	Δ Aug/Sept 2020	▼1	=	▼4	▼10	▼5	▼3	▼1	▲1	▼2	▲2	▼8	▼2	▼4	▼5	▼1	▼4	=	=	=	▲2	=	▲3	▼1	▲2	▲1	▲4	▲9	▲1
Don't know	Feb/Mar 2022	4	4	2	2	0	3	2	3	2	4	7	4	7	6	5	3	4	2	1	9	4	1	6	1	2	1	6	9
	Δ Aug/Sept 2020	=	▼10	▼5	▲2	▼1	▼2	▼2	▼4	=	▼3	▲7	▲1	▲3	▲4	=	▲3	=	=	=	▼1	▲1	▼2	▲2	=	▲2	=	▼3	▲9

In all 27 EU Member States, more than two-thirds of respondents believe that **developing research and digital solutions to support the agriculture and food sectors** is an important priority of the CAP. More than nine in ten respondents share this opinion in Cyprus (95%), Italy (93%), and Malta (92%). At the other end of the scale, fewer than three-quarters of respondents consider that developing research and digital solutions to support the agriculture and food sectors is an important CAP priority in France (69%), Czechia (73%), and the Netherlands and Austria (both 74%).

More than half of respondents say this priority is ‘very important’ in Malta (60%), Cyprus (57%), and Greece (53%).

QA7.1 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - Developing research and digital solutions to support the agriculture and food sectors)



Since 2020, the share of respondents who think that **developing research and digital solutions to support the agriculture and food sectors** is an important CAP priority has risen in 15 EU Member States, most notably in Croatia (86%, +9 percentage points). Conversely, it has fallen in 12 countries, most notably in Estonia (79%, -6).

QA7.1 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Developing research and digital solutions to support the agriculture and food sectors (%)

		EU27	HR	DE	CY	MT	CZ	IT	IE	LU	BG	LV	PL	BE	ES	LT	HU	EL	NL	AT	SI	SE	DK	PT	RO	FR	SK	FI	EE
Total 'Important'	Feb/Mar 2022	81	86	76	95	92	73	93	90	80	79	84	89	81	84	90	89	89	74	74	85	79	75	89	79	69	85	77	79
	Δ Aug/Sep 2020	▲1	▲9	▲6	▲6	▲6	▲5	▲5	▲3	▲3	▲2	▲2	▲2	▲1	▲1	▲1	▲1	▼1	▼1	▼1	▼1	▼1	▼2	▼3	▼3	▼4	▼4	▼4	▼6
Total 'Not important'	Feb/Mar 2022	14	13	19	2	4	21	5	6	18	8	14	8	18	8	5	9	6	24	23	13	19	20	3	15	20	10	19	15
	Δ Aug/Sep 2020	▼1	▼7	▼6	▼3	▼2	▲2	▼2	▼7	▼5	▼2	▲2	▼1	▼1	▼4	▼2	=	=	=	=	▲2	▼1	▲3	▲1	▲1	▲1	▲3	=	=
Don't know	Feb/Mar 2022	5	1	5	3	4	6	2	4	2	13	2	3	1	8	5	2	5	2	3	2	2	5	8	6	11	5	4	6

The socio-demographic data reveal few differences. However:

- Respondents aged 15-24 are more likely than those aged 55 and over to agree that **developing research and digital solutions to support the agriculture and food sectors** is an important priority of the CAP (86% compared with 80%), but they are less likely to say so about **encouraging young people to enter the agricultural sector** (83%, compared with 88%);
- Europeans who left school at age 15 or earlier are more likely than those who continued in education up to age 20 or beyond to agree that **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors** (90% compared with 82%) and **encouraging young people to enter the agricultural sector** (89% compared with 84%) are important priorities of the CAP;

In addition, Europeans who think that agriculture and rural areas are important for the future of the European Union are by far the most likely to consider that these nine priorities of the CAP are important, particularly when it comes to **encouraging young people to enter the agricultural sector** (88% compared with 66% among those who consider that agriculture and rural areas are not important for the future of the EU).

The same pattern applies to respondents who agree that the CAP benefits all European citizens and not only farmers, who are by far the most likely to agree that each of these nine priorities of the CAP is important.

QA7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are? (% - EU)

	Developing research and digital solutions to support the agriculture and food sectors		Strengthening the farmer's role in the food chain		Encouraging young people to enter the agricultural sector		Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors		Help tackle climate change		Securing a stable supply of food in the EU at all times		Ensuring reasonable food prices for consumers		Ensuring sustainable management of natural resources		Reducing disparities in the development of different regions and territories of the EU	
	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'
EU27	81	14	90	7	87	10	87	10	89	8	93	5	91	7	92	5	84	12
Age																		
15-24	86	9	88	9	83	14	87	9	90	7	93	4	90	7	91	6	83	12
25-39	82	15	90	8	85	13	86	11	88	10	94	4	90	9	92	6	84	13
40-54	80	16	91	7	86	11	87	10	90	8	94	4	91	7	93	5	84	13
55 +	80	13	91	6	88	8	88	9	90	7	94	3	92	6	91	5	84	10
Education (End of)																		
15-	79	10	91	4	89	6	90	5	90	5	93	2	93	3	89	3	85	7
16-19	83	12	92	6	90	8	90	8	91	7	94	4	92	6	93	5	86	10
20+	79	17	90	8	84	14	82	15	88	10	94	5	89	9	92	6	81	16
Still studying	86	10	88	9	80	17	86	10	91	6	93	4	90	7	92	5	82	13
View on agriculture and rural areas in EU																		
Important	82	13	91	6	88	9	88	9	90	7	94	4	92	6	92	5	85	11
Not Important	66	31	73	24	66	30	72	23	73	25	77	19	76	22	78	19	67	28
Common Agricultural Policy (CAP) benefits citizens																		
Agree	85	11	93	6	89	9	89	9	93	6	96	3	93	6	95	3	87	10
Disagree	68	27	85	13	79	19	79	18	81	17	88	10	86	12	86	11	74	22

4. The CAP's contribution

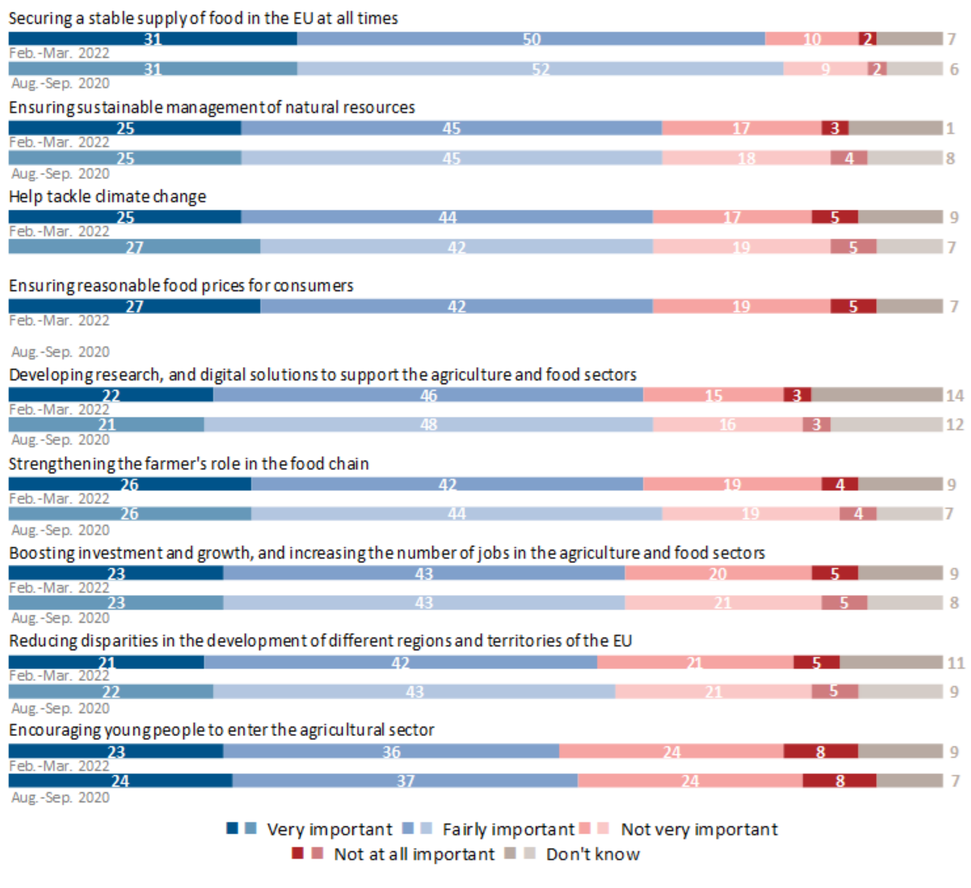
More than half of Europeans agree that the CAP contributes to the nine areas tested, particularly when it comes to securing a stable supply of food in the EU at all times

When asked whether they agree that the common agricultural policy contributes to nine areas [31], respondents provide the following answers:

- More than eight in ten Europeans (81%, -2 percentage points since 2020) say the CAP contributes to **'securing a stable supply of food in the EU at all times'** [32], with 31% (unchanged) who 'totally agree';
- Seven in ten respondents think that the CAP contributes to **'ensuring sustainable management of natural resources'** (70%, =, including 25%, =, 'totally agree');
- More than two-thirds of Europeans consider that the CAP contributes to four other areas: **'help tackle climate change'** (69%, =, including 25%, -2, 'totally agree'), **'ensuring reasonable food prices for consumers'** (69%, with 27% 'totally agree') [33], **'developing research, and digital solutions to support the agriculture and food sectors'** (68%, -1, including 22%, +1, 'totally agree'), and **'strengthening the farmer's role in the food chain'** (68%, -2, with 26%, =, 'totally agree');
- More than six in ten respondents share this opinion about **'boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors'** (66%, =, including 23%, =, 'totally agree'), and **'reducing disparities in the development of different regions and territories of the EU'** (63%, -2, with 21%, -1, 'totally agree');
- Close to six in ten Europeans (59%, -2) agree that the CAP contributes to **'encouraging young people to enter the agricultural sector'** (including 23%, -1, 'totally agree').

It is interesting to note that more than one in five respondents say they 'totally agree' that the common agricultural policy contributes to each of the nine areas tested.

QA8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - EU)



[31] QA8. Do you agree or not that the Common Agricultural Policy (CAP) contributes to ...? 1. Developing research, and digital solutions to support the agriculture and food sectors; 2. Strengthening the farmer's role in the food chain; 3. Encouraging young people to enter the agricultural sector; 4. Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors; 5. Help tackle climate change; 6. Securing a stable supply of food in the EU at all times; 7. Ensuring reasonable food prices for consumers; 8. Ensuring sustainable management of natural resources; 9. Reducing disparities in the development of different regions and territories of the EU. Totally agree; Tend to agree, Tend to disagree, Totally disagree, Don't know.

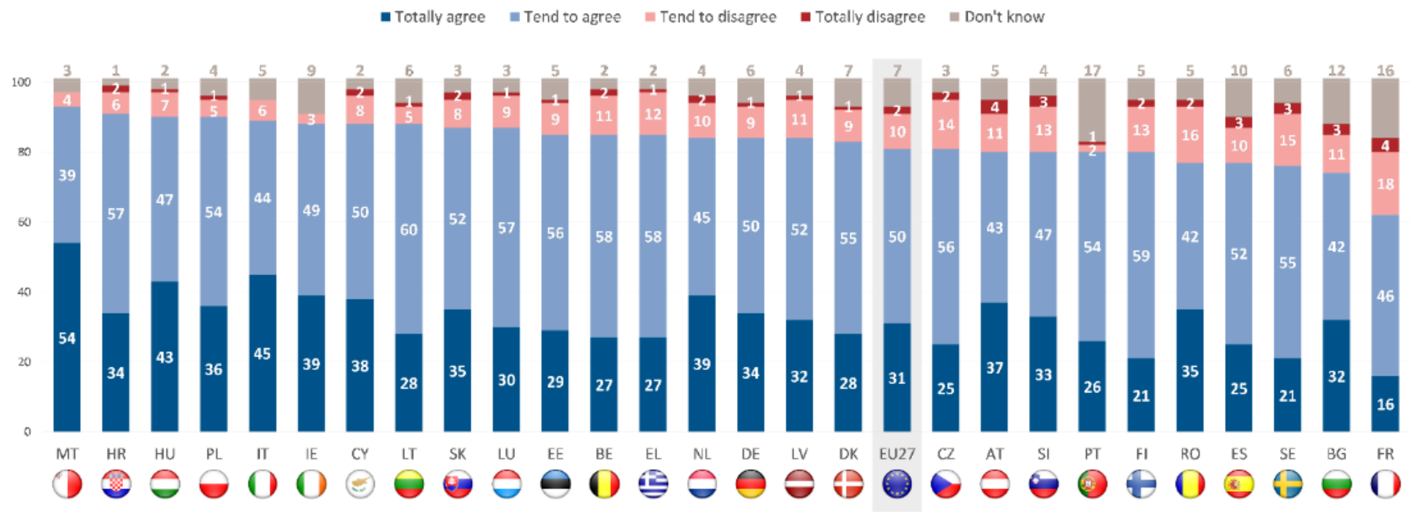
[32] This item has been modified since 2020: from 'Securing a stable supply of food in the EU' to 'Securing a stable supply of food in the EU at all times'

[33] This item has been asked for the first time in this survey.

A national analysis reveals that more than six in ten respondents in all 27 EU Member States believe that the CAP contributes to **securing a stable supply of food in the EU at all times**. At least nine in ten respondents hold this view in Malta (93%), Croatia (91%), and Poland and Hungary (both 90%), compared with fewer than eight in ten in France (62%), Bulgaria (74%), Sweden (76%), Spain, and Romania (both 77%).

More than one in five respondents 'totally agree' that the CAP contributes to securing a stable supply of food in the EU at all times in 26 EU Member States, including more than four in ten in Malta (54%), Italy (45%), and Hungary (43%).

QA8.6 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Securing a stable supply of food in the EU at all times)



Since 2020, the proportion of respondents who agree that the CAP contributes to **securing a stable supply of food in the EU at all times** has increased in 14 EU Member States, most notably in Malta (93%, +7 percentage points). Conversely, it has decreased in 13 countries, particularly in Finland (80%, -8) and France (62%, -7).

QA8.6 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Securing a stable supply of food in the EU at all times (%)

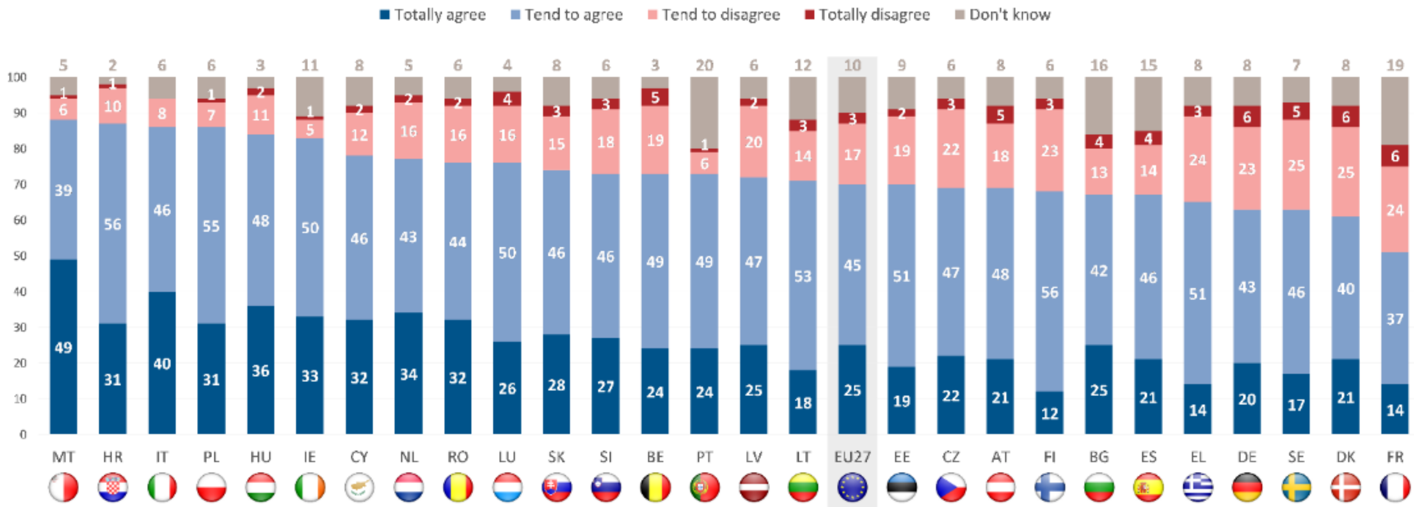
		EU27	MT	BE	HR	IT	LV	LT	PL	SK	BG	DK	CY	HU	RO	SI	EL	LU	DE	NL	CZ	EE	IE	ES	SE	AT	PT	FR	FI
Total 'Agree'	Feb/Mar 2022	81	93	85	91	89	84	88	90	87	74	83	88	90	77	80	85	87	84	84	81	85	88	77	76	80	80	62	80
	Δ Aug/Sep 2020	▼2	▲7	▲4	▲4	▲4	▲3	▲3	▲3	▲3	▲2	▲2	▲1	▲1	▲1	▲1	▼1	▼1	▼2	▼2	▼3	▼3	▼4	▼4	▼4	▼5	▼6	▼7	▼8
Total 'Disagree'	Feb/Mar 2022	12	4	13	8	6	12	6	6	10	14	10	10	8	18	16	13	10	10	12	16	10	3	13	18	15	3	22	15
	Δ Aug/Sep 2020	▲1	▲3	▼4	▼3	▼3	=	▼2	▼2	▼3	=	▲3	▲3	=	▼1	▲1	▲2	▼2	▲1	▲2	▲5	▼1	▼5	=	▼1	▲4	▲1	▲5	▲4
Don't know	Feb/Mar 2022	7	3	2	1	5	4	6	4	3	12	7	2	2	5	4	2	3	6	4	3	5	9	10	6	5	17	16	5

In all 27 EU Member States, more than half of respondents think that the CAP contributes to **ensuring sustainable management of natural resources**, with the highest proportions in Malta (88%), Croatia (87%), and Italy and Poland (both 86%), and the lowest in France (51%), Denmark (61%), and Germany and Sweden (both 63%).

In 21 countries, at least one in five respondents 'totally agree' with this idea, including more than a third in Malta (49%), Italy (40%), Hungary (36%), and the Netherlands (34%).

In Portugal, one in five respondents say they 'don't know' (20%).

QA8.8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Ensuring sustainable management of natural resources)



Since 2020, the belief that the CAP contributes to **ensuring sustainable management of natural resources** has gained ground in 18 EU Member States, most significantly in Malta (88%, +13 percentage points). Conversely, it has lost ground in seven countries, most notably in France (51%, -6). It remains unchanged in Greece and Sweden.

QA8.8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Ensuring sustainable management of natural resources (%)

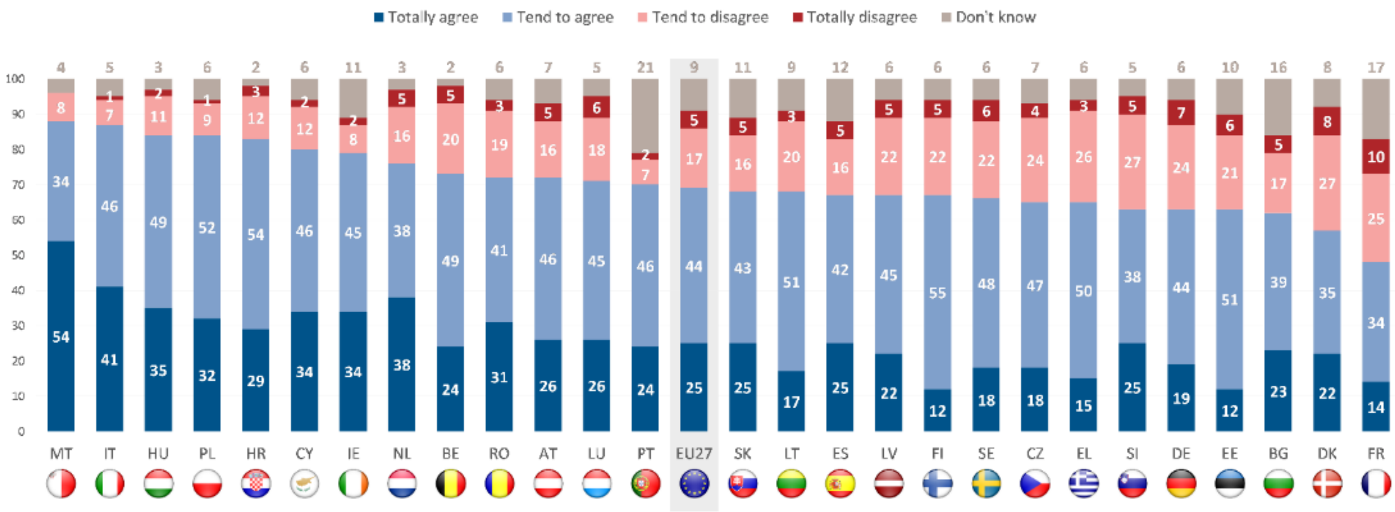
		EU27	MT	IE	BE	BG	HR	LV	IT	NL	RO	SI	ES	SK	PL	CZ	LT	LU	HU	FI	EL	SE	DK	EE	CY	DE	AT	PT	FR
Total 'Agree'	Feb/Mar 2022	70	88	83	73	67	87	72	86	77	76	73	67	74	86	69	71	76	84	68	65	63	61	70	78	63	69	73	51
	Δ Aug/Sept 2020	=	▲13	▲8	▲7	▲7	▲6	▲6	▲5	▲5	▲4	▲4	▲3	▲3	▲2	▲1	▲1	▲1	▲1	▲1	=	=	▼1	▼1	▼2	▼3	▼4	▼5	▼6
Total 'Disagree'	Feb/Mar 2022	20	7	6	24	17	11	22	8	18	18	21	18	18	8	25	17	20	13	26	27	30	31	21	14	29	23	7	30
	Δ Aug/Sept 2020	▼2	▼1	▼19	▼7	▼5	▼5	▲1	▼4	▼6	▼4	▼3	▼10	▼3	▼2	▲5	=	▼5	▲1	▼6	▲1	▼6	▲7	▼7	▲4	▲2	▲2	▼1	▲1
Don't know	Feb/Mar 2022	10	5	11	3	16	2	6	6	5	6	6	15	8	6	6	12	4	3	6	8	7	8	9	8	8	8	20	19
	Δ Aug/Sept 2020	▲2	▼12	▲11	=	▼2	▼1	▼7	▼1	▲1	=	▼1	▲7	=	=	▼6	▼1	▲4	▼2	▲5	▼1	▲6	▼6	▲8	▼2	▲1	▲2	▲6	▲5

In all 27 EU Member States, a majority or relative majority of respondents believe that the CAP contributes to **help tackle climate change**. Respondents in Malta (88%), Italy (87%), and Poland and Hungary (both 84%) are the most likely to share this opinion. This gap is narrower in France (48% versus 35%), Denmark (57%), and Bulgaria (62%).

In 19 EU Member States, more than one in five respondents say they 'totally agree' with this idea, with the highest numbers in Malta (54%), Italy (41%), and the Netherlands (38%).

In Portugal, slightly more than one in five respondents answer 'don't know' (21%).

QA8.5 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Help tackle climate change)



Since 2020, the share of respondents who consider that the CAP contributes to **help tackle climate change** has risen in 15 EU Member States, including by double digits in Latvia (67%, +13 percentage points), Ireland (79%, +12), Belgium (73%, +11), and Malta (88%, +10). Meanwhile, it has fallen in seven countries, most notably in France (48%, -7). It is unchanged in Hungary, Romania, Lithuania, and Czechia.

QA8.5 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Help tackle climate change (%)

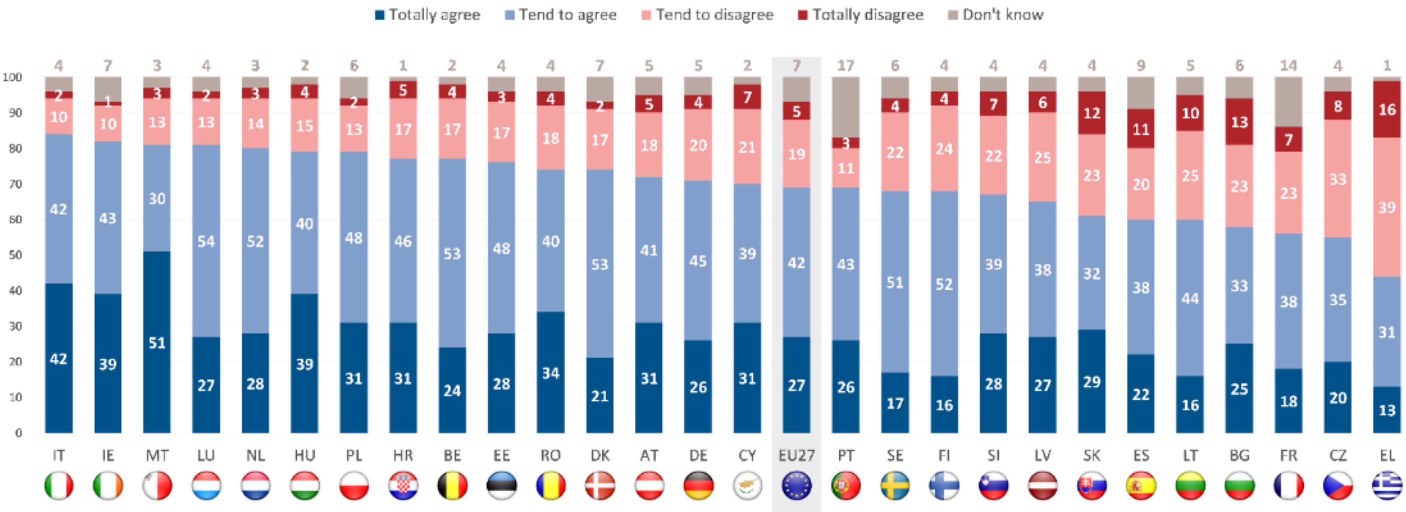
		EU27	LV	IE	BE	MT	HR	IT	NL	PL	BG	FI	ES	LU	SI	SE	CY	CZ	LT	HU	RO	AT	SK	DK	DE	PT	EE	EL	FR
Total 'Agree'	Feb/Mar 2022	69	67	79	73	88	83	87	76	84	62	67	67	71	63	66	80	65	68	84	72	72	68	57	63	70	63	65	48
	Δ Aug/Sep 2020	=	▲13	▲12	▲11	▲10	▲6	▲5	▲5	▲5	▲4	▲4	▲3	▲3	▲3	▲3	▲1	=	=	=	=	▼1	▼2	▼4	▼4	▼4	▼5	▼6	▼7
Total 'Disagree'	Feb/Mar 2022	22	27	10	25	8	15	8	21	10	22	27	21	24	32	28	14	28	23	13	22	21	21	35	31	9	27	29	35
	Δ Aug/Sep 2020	▼2	▼6	▼23	▼11	▲1	▼4	▼3	▼6	▼5	▼4	▼9	▼9	▼8	▼1	▼8	▲2	▲4	▲2	▲1	▲1	▼2	▼2	▲9	▲3	▼1	▼5	▲5	▲3
Don't know	Feb/Mar 2022	9	6	11	2	4	2	5	3	6	16	6	12	5	5	6	6	7	9	3	6	7	11	8	6	21	10	6	17

In 26 EU Member States, more than half of respondents think that the CAP contributes to **ensuring reasonable food prices for consumers**. More than eight in ten respondents share this opinion in Italy (84%), Ireland (82%), and Luxembourg and Malta (both 81%). At the other end of the scale, fewer than six in ten respondents agree with this statement in Czechia (55%), France (56%), and Bulgaria (58%).

In 22 countries, at least one in five respondents answer that they 'totally agree' with this idea, with the highest figures in Malta (51%), Italy (42%), and Hungary and Ireland (both 39%).

Greece is the only EU Member State where a minority of respondents consider that the CAP contributes to ensuring reasonable food prices for consumers (44% versus 55%).

QA8.7 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Ensuring reasonable food prices for consumers)

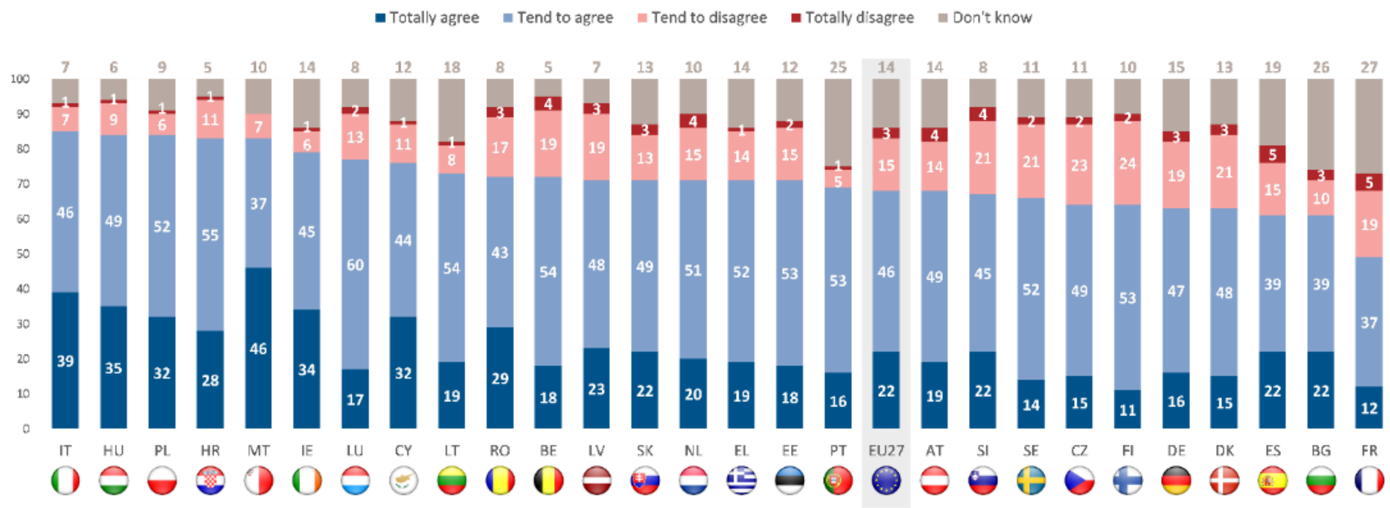


In all 27 EU Member States, a majority or relative majority of respondents believe that the CAP contributes to **developing research, and digital solutions to support the agriculture and food sectors**, with the highest proportions in Italy (85%), and Poland and Hungary (both 84%). This gap is smaller in France (49% versus 24%), and Spain and Bulgaria (both 61%).

In 14 EU Member States, at least one in five respondents 'totally agree' that the CAP contributes to developing research, and digital solutions to support the agriculture and food sectors, including more than a third in Malta (46%), Italy (39%), Hungary (35%), and Ireland (34%).

At least a quarter of respondents say they 'don't know' in three countries: in France (27%), Bulgaria (26%), and Portugal (25%).

QA8.1 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Developing research, and digital solutions to support the agriculture and food sectors)



Since 2020, the belief that the CAP contributes to **developing research, and digital solutions to support the agriculture and food sectors** has gained ground in 17 EU Member States, most dramatically in Malta (83%, +12 percentage points). However, it has lost ground in ten countries, particularly in Finland (64%, -8) and France (49%, -8).

QA8.1 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Developing research, and digital solutions to support the agriculture and food sectors (%)

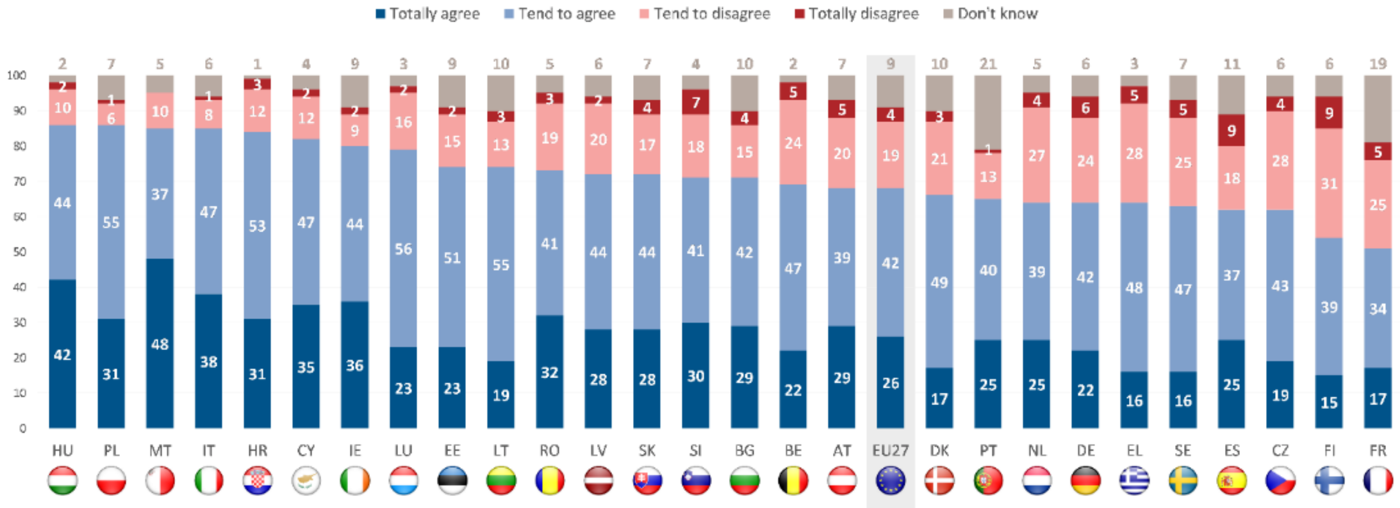
		EU27	MT	HR	LV	BG	IT	LU	PL	LT	NL	BE	DK	CY	SK	CZ	DE	IE	HU	EL	RO	SI	EE	SE	ES	AT	PT	FR	FI
Total 'Agree'	Feb/Mar 2022	68	83	83	71	61	85	77	84	73	71	72	63	76	71	64	63	79	84	71	72	67	71	66	61	68	69	49	64
	Δ Aug/Sep 2020	▼1	▲12	▲9	▲8	▲5	▲5	▲5	▲4	▲3	▲3	▲2	▲2	▲2	▲2	▲1	▲1	▲1	▲1	▼1	▼1	▼1	▼4	▼4	▼5	▼6	▼7	▼8	▼8
Total 'Disagree'	Feb/Mar 2022	18	7	12	22	13	8	15	7	9	19	23	24	12	16	25	22	7	10	15	20	25	17	23	20	18	6	24	26
	Δ Aug/Sep 2020	▼1	▼1	▼9	▲2	▼2	▼3	▼12	▼3	▼4	▼6	▼4	▲8	▲3	▼1	▲8	▼2	▼15	▼1	▲1	=	▲4	▼8	▼6	▼6	=	▲1	▲3	▼1
Don't know	Feb/Mar 2022	14	10	5	7	26	7	8	9	18	10	5	13	12	13	11	15	14	6	14	8	8	12	11	19	14	25	27	10

More than half of respondents in all 27 EU Member States agree that the CAP contributes to **strengthening the farmer's role in the food chain**, with proportions varying from 86% in both Poland and Hungary, and 85% in both Italy and Malta, to 51% in France, 54% in Finland, and 62% in both Spain and Czechia.

In 20 EU Member States, more than one in five respondents answer that they 'totally agree' that the CAP contributes to strengthening the farmer's role in the food chain, with the highest scores in Malta (48%), Hungary (42%), and Italy (38%).

In Portugal, slightly more than one in five respondents answer 'don't know' (21%).

QA8.2 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Strengthening the farmer's role in the food chain)



Since 2020, the proportion of respondents who think that the CAP contributes to **strengthening the farmer's role in the food chain** has increased in 16 EU Member States, most notably in Malta (85%, +9 percentage points). Conversely, it has decreased in 11 countries, including by double digits in Finland (54%, -10).

QA8.2 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Strengthening the farmer's role in the food chain (%)

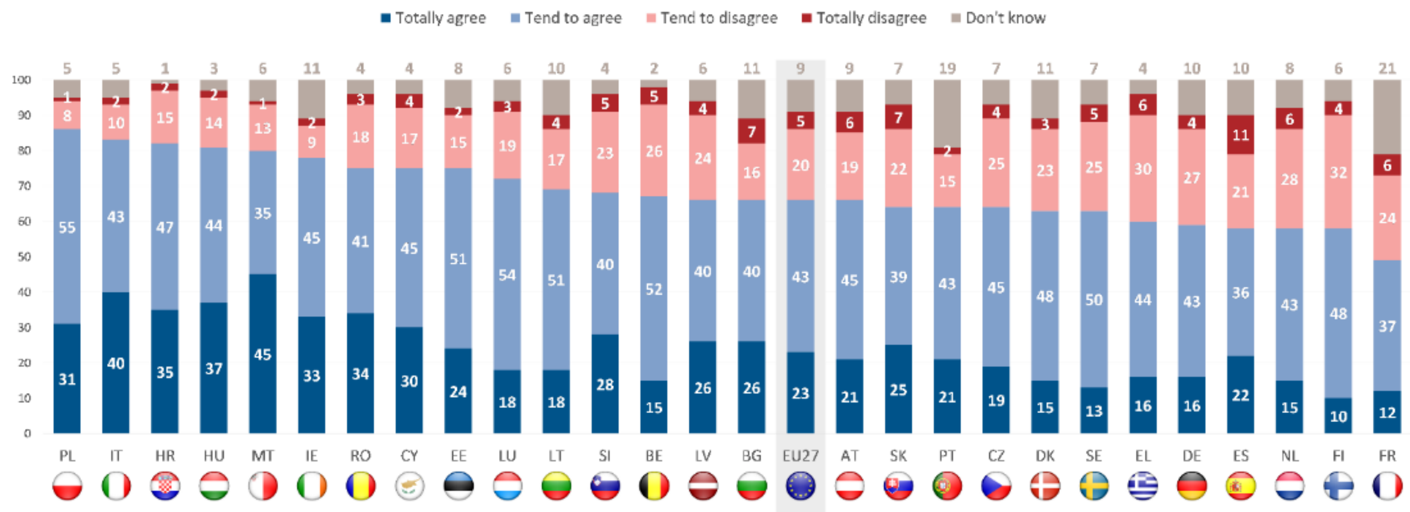
		EU27	MT	IE	LU	IT	LV	BG	HU	PL	BE	HR	SI	DK	EE	CY	NL	SK	EL	LT	RO	DE	ES	SE	CZ	AT	FR	PT	FI
Total 'Agree'	Feb/Mar 2022	68	85	80	79	85	72	71	86	86	69	84	71	66	74	82	64	72	64	74	73	64	62	63	62	68	51	65	54
	Δ Aug/Sep 2020	▼2	▲9	▲7	▲6	▲4	▲4	▲3	▲3	▲3	▲2	▲2	▲2	▲1	▲1	▲1	▲1	▲1	▼1	▼1	▼2	▼3	▼3	▼3	▼4	▼5	▼7	▼7	▼10
Total 'Disagree'	Feb/Mar 2022	23	10	11	18	9	22	19	12	7	29	15	25	24	17	14	31	21	33	16	22	30	27	30	32	25	30	14	40
	Δ Aug/Sep 2020	=	▲1	▼16	▼9	▼3	▲1	▼2	▼1	▼4	▼2	▼1	▲1	▲7	▼9	▲6	▼2	▼3	▲3	▲2	▲3	▲2	▼3	▼2	▲7	▲2	▲2	=	▲5
Don't know	Feb/Mar 2022	9	5	9	3	6	6	10	2	7	2	1	4	10	9	4	5	7	3	10	5	6	11	7	6	7	19	21	6

In all 27 EU Member States, a majority or relative majority of respondents think that the CAP contributes to **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors**. More than eight in ten respondents share this opinion in Poland (86%), Italy (83%), Croatia (82%), and Hungary (81%). However, fewer than six in ten respondents agree with this idea in France (49% versus 30%), Spain, the Netherlands, Finland (all 58%), and Germany (59%).

More than one in five respondents 'totally agree' that the CAP contributes to boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors in 16 EU Member States, with the highest numbers in Malta (45%), Italy (40%), and Hungary (37%).

Slightly more than one in five respondents say they 'don't know' in France (21%).

QA8.4 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors)



Since 2020, the belief that the CAP contributes to **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors** has lost ground in 13 EU Member States, most notably in Finland (58%, -7 percentage points). Meanwhile, it has gained ground in 11 countries, including by double digits in Malta (80%, +11). It is unchanged in Romania, Lithuania, and Greece.

QA8.4 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors (%)

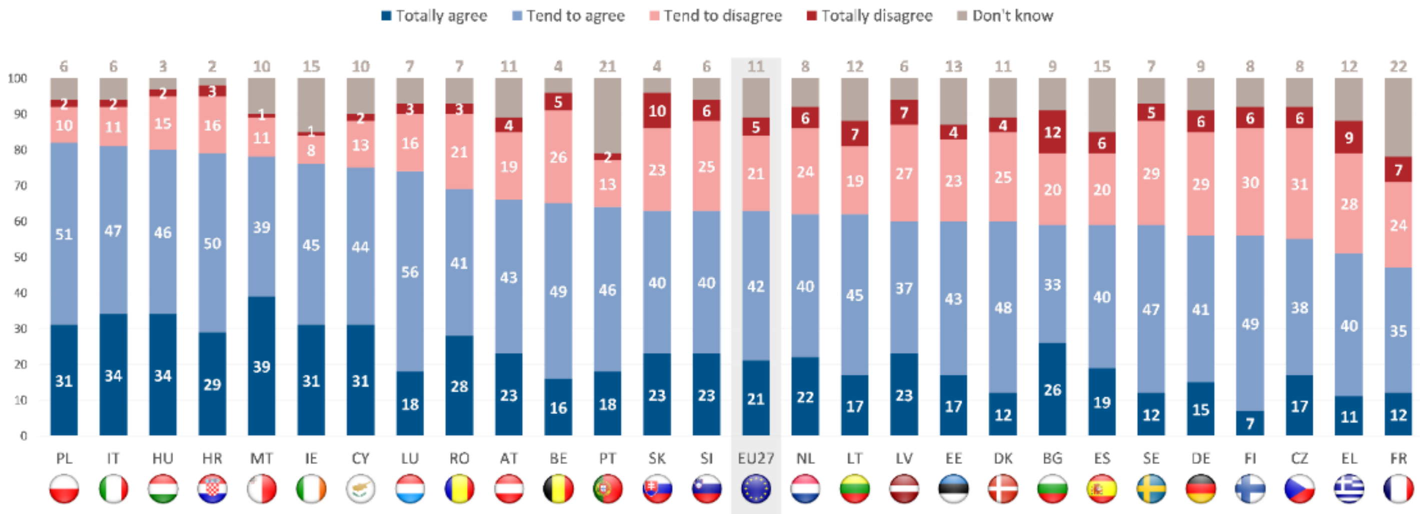
		EU27	MT	BG	IT	PL	LV	IE	HR	LU	NL	SI	BE	EL	LT	RO	EE	HU	SK	SE	DK	DE	CY	CZ	ES	FR	PT	AT	FI
Total 'Agree'	Feb/Mar 2022	66	80	66	83	86	66	78	82	72	58	68	67	60	69	75	75	81	64	63	63	59	75	64	58	49	64	66	58
	Δ Aug/Sep 2020	=	▲11	▲5	▲5	▲5	▲4	▲3	▲2	▲2	▲2	▲2	▲1	=	=	=	▼1	▼1	▼2	▼2	▼3	▼3	▼3	▼4	▼4	▼4	▼5	▼6	▼7
Total 'Disagree'	Feb/Mar 2022	25	14	23	12	9	28	11	17	22	34	28	31	36	21	21	17	16	29	30	26	31	21	29	32	30	17	25	36
	Δ Aug/Sep 2020	▼1	▲2	▼5	▼4	▼4	=	▼14	=	▼7	▼5	▲1	▼1	▲1	▲1	▲1	▼6	▲3	▲1	▼3	▲8	▲2	▲8	▲7	=	▲1	=	▲3	▲2
Don't know	Feb/Mar 2022	9	6	11	5	5	6	11	1	6	8	4	2	4	10	4	8	3	7	7	11	10	4	7	10	21	19	9	6

A majority or relative majority of respondents in the 27 EU Member States believe that the CAP contributes to **reducing disparities in the development of different regions and territories of the EU**. At least eight in ten respondents agree with this idea in Poland (82%), Italy (81%), and Hungary (80%), while there is a smaller relative majority in France (47% versus 31%), Greece (51%), and Czechia (55%).

More than one in five respondents in 14 EU Member States 'totally agree' that the CAP contributes to reducing disparities in the development of different regions and territories of the EU, and more than a third in Malta (39%), and Italy and Hungary (both 34%).

In two countries, more than one in five respondents respond that they 'don't know': France (22%) and Portugal (21%).

QA8.9 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Reducing disparities in the development of different regions and territories of the EU)



Since 2020, the opinion that **the CAP contributes to reducing disparities in the development of different regions and territories of the EU** has gained ground in 14 EU Member States, most dramatically in Malta (78%, +12 percentage points). Meanwhile, it has lost ground in ten countries, particularly in Czechia (55%, -7). It is unchanged in Ireland, Belgium, and Portugal.

QA8.9 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Reducing disparities in the development of different regions and territories of the EU (%)

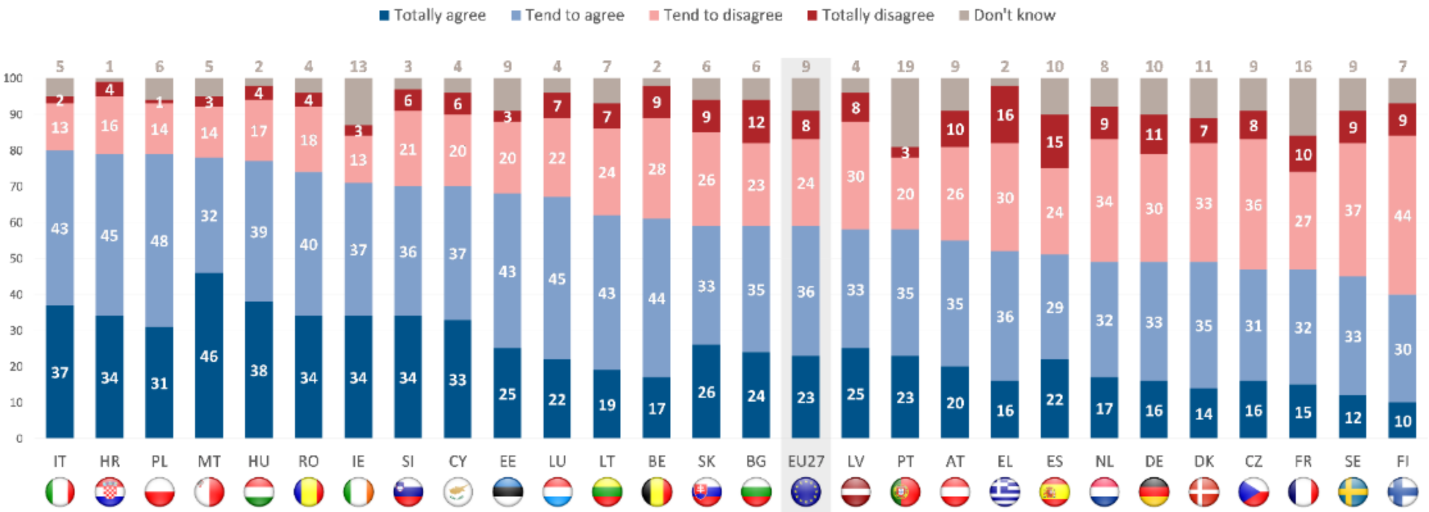
		EU27	MT	BG	HR	LU	IT	CY	LV	DK	PL	RO	SI	SK	HU	NL	BE	IE	PT	EE	LT	FI	EL	ES	FR	SE	AT	DE	CZ
Total 'Agree'	Feb/Mar 2022	63	78	59	79	74	81	75	60	60	82	69	63	63	80	62	65	76	64	60	62	56	51	59	47	59	66	56	55
	Δ Aug/Sept 2020	▼2	▲12	▲7	▲6	▲6	▲5	▲5	▲5	▲3	▲2	▲2	▲2	▲2	▲1	▲1	=	=	=	▼1	▼2	▼2	▼3	▼3	▼4	▼4	▼5	▼6	▼7
Total 'Disagree'	Feb/Mar 2022	26	12	32	19	19	13	15	34	29	12	24	31	33	17	30	31	9	15	27	26	36	37	26	31	34	23	35	37
	Δ Aug/Sept 2020	=	▲3	▼4	▼5	▼12	▼3	▲2	▲2	▲6	▼2	▼1	=	▼1	▲1	▼4	▼1	▼15	▼5	▼12	▲1	▼5	▲3	▼5	=	▼2	▼1	▲5	▲10
Don't know	Feb/Mar 2022	11	10	9	2	7	6	10	6	11	6	7	6	4	3	8	4	15	21	13	12	8	12	15	22	7	11	9	8
	Δ Aug/Sept 2020	▲2	▼15	▼3	▼1	▲6	▼2	▼7	▼7	▼9	=	▼1	▼2	▼1	▼2	▲3	▲1	▲15	▲5	▲13	▲1	▲7	=	▲8	▲4	▲6	▲6	▲1	▼3

In 25 EU Member States, a majority or relative majority of respondents consider that the CAP contributes to **encouraging young people to enter the agricultural sector**. More than a quarter of respondents share this opinion in Italy (80%), Poland and Croatia (both 79%), Malta (78%), and Hungary (77%). At the other end of the scale, there is a smaller relative majority in Czechia (47% versus 44%), France (47% vs 37%), the Netherlands (49% vs 43%), Germany (49% vs 41%), and Denmark (49% vs 40%).

At least one in five respondents in 17 countries 'totally agree' with this idea, with the highest scores in Malta (46%), Hungary (38%), and Italy (37%).

However, in two EU Member States, only minorities of respondents agree that the CAP contributes to encouraging young people to enter the agricultural sector: Finland (40% versus 53%) and, to a lesser extent, Sweden (45% vs 46%).

QA8.3 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - Encouraging young people to enter the agricultural sector)



Since 2020, the proportion of respondents who agree that the CAP contributes to **encouraging young people to enter the agricultural sector** has increased in 14 EU Member States, most dramatically in Malta (78%, +11 percentage points). Conversely, it has decreased in 13 countries, including by double digits in Czechia (47%, -11) and Austria (55%, -10).

QA8.3 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Encouraging young people to enter the agricultural sector (%)

		EU27	MT	IE	EE	LU	SI	BG	IT	LV	NL	PL	RO	DK	BE	HR	HU	SK	FR	LT	FI	EL	ES	CY	DE	SE	PT	AT	CZ
Total 'Agree'	Feb/Mar 2022	59	78	71	68	67	70	59	80	58	49	79	74	49	61	79	77	59	47	62	40	52	51	70	49	45	58	55	47
	Δ Aug/Sep 2020	▼2	▲11	▲9	▲7	▲6	▲6	▲4	▲4	▲4	▲4	▲3	▲3	▲2	▲1	▲1	▼2	▼2	▼3	▼3	▼3	▼4	▼4	▼4	▼6	▼6	▼8	▼10	▼11
Total 'Disagree'	Feb/Mar 2022	32	17	16	23	29	27	35	15	38	43	15	22	40	37	20	21	35	37	31	53	46	39	26	41	46	23	36	44
	Δ Aug/Sep 2020	=	▼2	▼22	▼15	▼10	▼3	▼2	▼2	▲1	▼6	▼3	▼2	▲6	▼1	=	▲3	▲1	▲1	▲4	▼3	▲6	▼1	▲9	▲5	▼2	▲3	▲6	▲13
Don't know	Feb/Mar 2022	9	5	13	9	4	3	6	5	4	8	6	4	11	2	1	2	6	16	7	7	2	10	4	10	9	19	9	9

The socio-demographic data reveal that:

- Respondents who left school between 16-19 are the most likely to say that the CAP contributes to the nine areas tested, most notably to **encouraging young people to enter the agricultural sector** (63%, compared with 53% among those who continued in education up to age 20 or beyond);
- Europeans who have difficulties paying their bills from time to time are generally the most likely to agree that the CAP contributes to the areas tested. For instance, 64% agree that the CAP contributes to **encouraging young people to enter the agricultural sector**, compared with 55% among respondents who have such difficulties most of the time;
- Respondents who live in a large town are the most likely to agree that the CAP contributes to the nine areas tested, particularly to **securing a stable supply of food in the EU at all times** (84%, compared with 78% among those who live in a rural village) and **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors** (68% compared with 63%).

In addition, Europeans who have a positive image of the European Union are by far the most likely to agree that the CAP contributes to these nine areas, most strikingly to **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors** (72%, compared with 49% among respondents who have a negative image of the EU), **help tackle climate change** (75% compared with 53%)**, developing research, and digital solutions to support the agriculture and food sectors** (74% compared with 52%), and **ensuring sustainable management of natural resources** (76% compared with 55%).

A similar pattern applies to respondents who consider that agriculture and rural areas are important for the future in the EU and to those who believe that the CAP benefits all European citizens and not only farmers: they are the most likely to believe that the CAP contributes to the nine areas tested.

QA8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...? (% - EU)

	Developing research, and digital solutions to support the agriculture and food sectors		Strengthening the farmer's role in the food chain		Encouraging young people to enter the agricultural sector		Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors		Help tackle climate change		Securing a stable supply of food in the EU at all times		Ensuring reasonable food prices for consumers		Ensuring sustainable management of natural resources		Reducing disparities in the development of different regions and territories of the EU	
	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'
EU27	68	18	68	23	59	32	66	25	69	22	81	12	69	24	70	20	63	26
Education (End of)																		
15-	65	13	67	20	60	28	64	23	70	16	78	10	67	23	70	14	62	20
16-19	71	16	72	21	63	30	69	23	72	21	82	12	72	23	74	18	66	25
20+	66	21	65	27	53	37	63	28	65	27	80	14	69	25	66	26	61	30
Still studying	70	16	67	23	55	36	66	24	70	22	83	9	72	20	69	21	63	25
Difficulties paying bills																		
Most of the time	67	18	64	28	55	38	62	31	69	24	80	14	65	31	70	22	59	30
From time to time	70	17	71	21	64	28	69	22	71	20	80	13	70	23	72	19	65	24
Almost never/ Never	67	18	68	23	58	33	65	25	69	23	81	12	70	23	69	21	63	26
Subjective urbanisation																		
Rural village	66	18	67	23	58	32	63	27	68	21	78	13	69	24	70	18	62	26
Small/ mid size town	68	17	68	24	58	33	65	25	69	23	80	13	68	25	69	21	62	27
Large town	70	18	70	22	61	31	68	23	71	22	84	10	72	23	72	20	66	25
Image of the EU																		
Total 'Positive'	74	14	74	19	63	29	72	20	75	19	86	9	75	19	76	16	69	22
Neutral	67	17	67	23	59	32	65	25	68	22	79	13	68	25	68	21	62	26
Total 'Negative'	52	30	55	36	48	43	49	40	53	37	67	24	55	38	55	33	49	39
View on agriculture and rural areas in EU																		
Important	69	17	69	22	59	32	66	25	70	22	81	12	70	23	71	19	64	25
Not Important	58	31	57	34	52	41	56	38	56	39	65	31	62	33	58	37	54	39

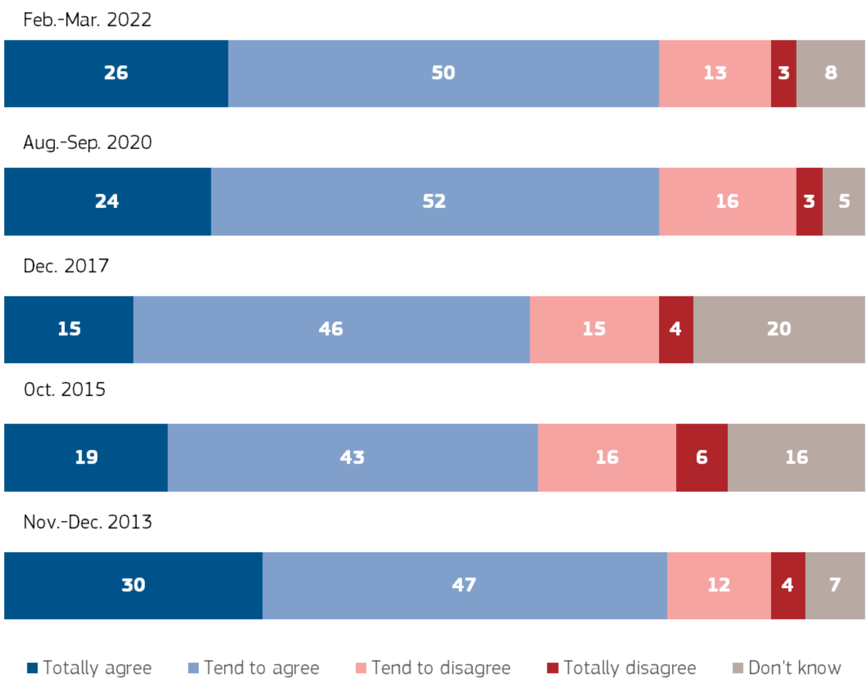
5. Does the CAP benefit only farmers?

More than three-quarters of Europeans agree that the CAP benefits all European citizens and not only farmers

Slightly more than three-quarters of respondents (76%, unchanged since 2020) agree that **'the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers'**[34]. This includes the more than a quarter of respondents (26%, +2 percentage points) who 'totally agree' and the half who 'tend to agree' (50%, -2). Meanwhile, fewer than one in five respondents (16%, -3) disagree that the CAP benefits all European citizens and not only farmers, including 3% (=) who 'totally disagree' and more than one in ten (13%, -3) who 'tend to disagree'. Almost one in ten respondents (8%, +3) respond 'don't know'.

A longer-term trend analysis shows that agreement with the statement 'the CAP benefits all European citizens and not only farmers' is at its joint highest level since 2013 (76% in 2022, as in 2020, compared with 77% in 2013). This is a much higher proportion than those recorded in 2015 (62%) and 2017 (61%).

QA3. To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers.

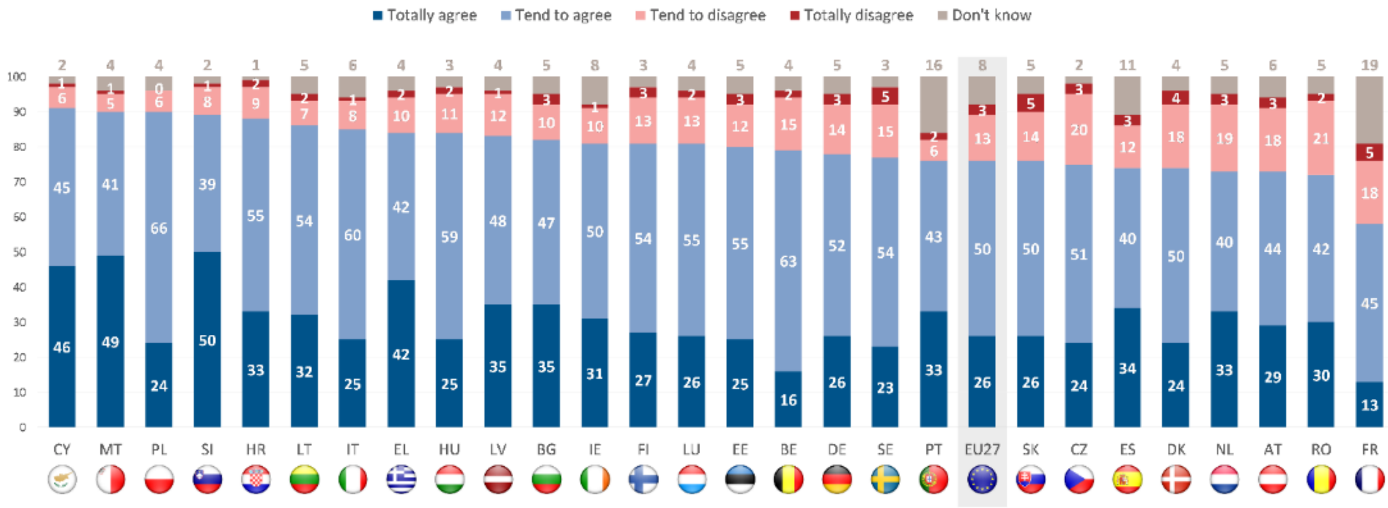


[34] QA3. To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers. Totally agree, Tend to Agree, Tend to disagree, Totally disagree, Don't know.

In all 27 EU Member States, more than half of respondents believe that the CAP benefits all European citizens and not only farmers. At least nine in ten respondents agree with this statement in Cyprus (91%), and Poland and Malta (both 90%). At the other end of the scale, fewer than three-quarters of respondents agree with this statement in France (58%), Romania (72%), the Netherlands and Austria (both 73%), and Spain and Denmark (both 74%).

More than one in five respondents totally agree that the CAP benefits all European citizens and not only farmers in 25 EU Member States, and more than four in ten in Slovenia (50%), Malta (49%), Cyprus (46%), and Greece (42%).

QA3 To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers. (%)



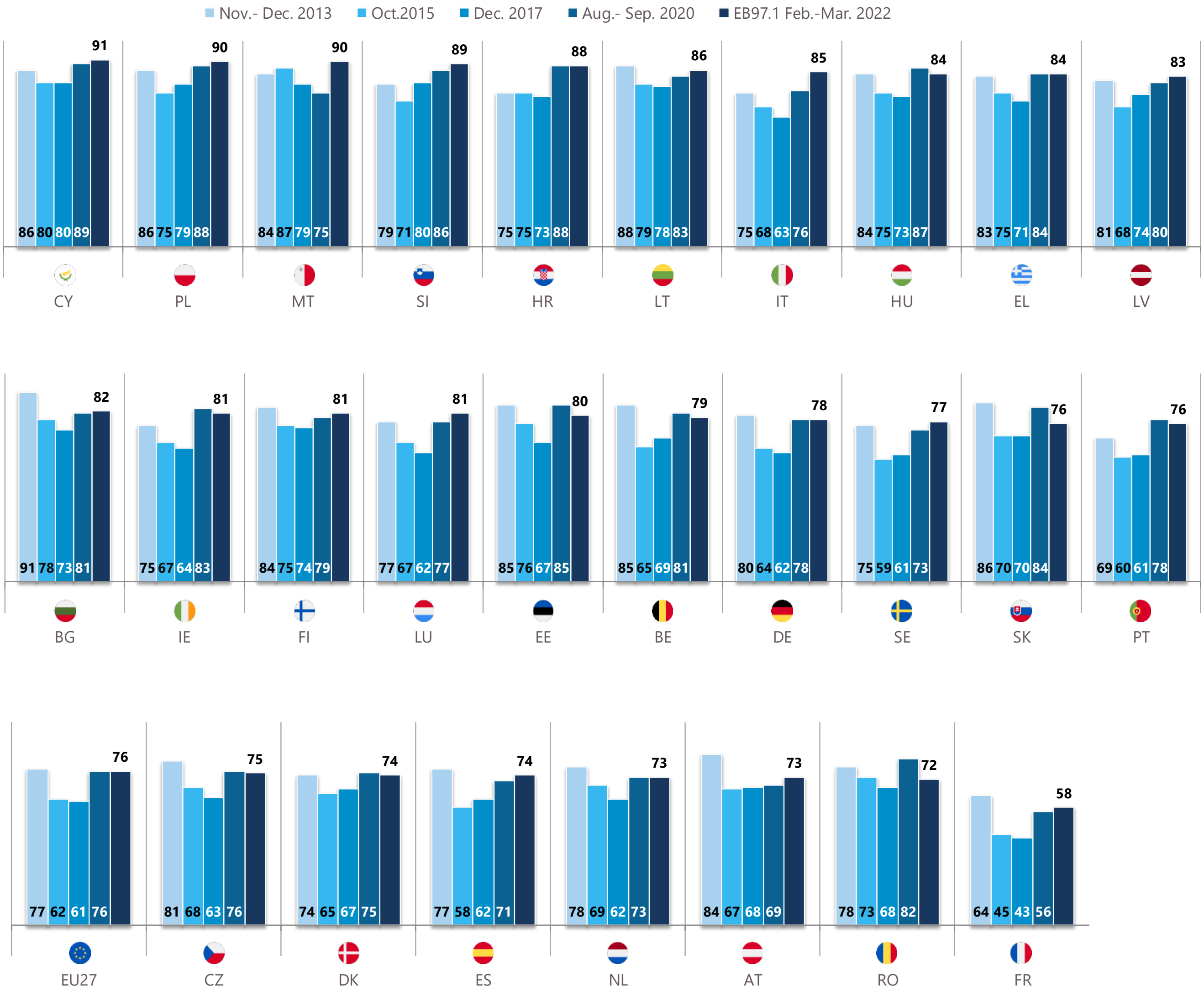
Since 2020, the proportion of respondents who agree that the CAP benefits all European citizens and not only farmers has increased in 13 EU Member States, most strikingly in Malta (90%, +15 percentage points). Meanwhile, it has decreased in nine countries, most notably in Romania (72%, -10). It is unchanged in five countries.

QA3 To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers. (%)

		EU27	MT	IT	LU	AT	SE	ES	LV	LT	SI	FR	CY	FI	PL	BG	DE	EL	HR	NL	CZ	DK	BE	IE	HU	PT	EE	SK	RO
Total 'Agree'	Feb/Mar 2022	76	90	85	81	73	77	74	83	86	89	58	91	81	90	82	78	84	88	73	75	74	79	81	84	76	80	76	72
	Δ Aug/Sep 2020	=	▲15	▲9	▲4	▲4	▲4	▲3	▲3	▲3	▲3	▲2	▲2	▲2	▲1	=	=	=	=	=	▼1	▼1	▼2	▼2	▼2	▼2	▼4	▼8	▼10
Total 'Disagree'	Feb/Mar 2022	16	6	9	15	21	20	15	13	9	9	23	7	16	6	13	17	12	11	22	23	22	17	11	13	8	15	19	23
	Δ Aug/Sep 2020	▼3	▲1	▼11	▼8	▼1	▼6	▼8	▼2	▼3	▼3	▼5	=	▼4	▼3	▼1	▼2	▼2	=	▼2	▲1	▲4	=	▼6	=	▼1	=	▲4	▲8
Don't know	Feb/Mar 2022	8	4	6	4	6	3	11	4	5	2	19	2	3	4	5	5	4	1	5	2	4	4	8	3	16	5	5	5

A longer-term trend analysis shows that the share of respondents who consider that the CAP benefits all European citizens and not only farmers has fallen in 13 EU Member States since 2013, including by double digits in Austria (73%, -11 percentage points since 2013) and Slovakia (76%, -10). However, it has risen in 12 countries, most dramatically in Croatia (88%, +13), Slovenia (89%, +10), and Italy (85%, +10). It remains unchanged in Hungary and Denmark.

QA3 To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers. **(% - TOTAL 'AGREE')**



The socio-demographic data reveal that more than seven in ten respondents agree that the CAP benefits all European citizens and not only farmers in all socio-demographic categories. However:

- Respondents who left school between 16-19 (78%) are more likely than those who left school at age 15 or earlier (73%) to agree with this statement;
- Other white-collar workers (80%) and managers (79%) are the most likely to share this opinion, particularly when compared with house persons and unemployed people (72% in both categories);
- Europeans who have difficulties paying their bills most of the time are the least likely to agree that the CAP benefits all European citizens and not only farmers (71%, compared with 76-77% among those who have such difficulties from time to time or never or almost never);

Moreover, Europeans who have a positive image of the European Union are much more likely than those who have a negative image of the EU to agree that the CAP benefits all European citizens and not only farmers (84% compared with 57%).

Respondents who think that agriculture and rural areas are important for the future in the EU are also far more likely to agree with this statement than those who believe that agriculture and rural areas are not important (78%, compared with a minority of 35%).

QA3 To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers. (% - EU)

	Total 'Agree'	Total 'Disagree'
EU27	76	16
Education (End of)		
15-	73	16
16-19	78	15
20+	76	17
Still studying	77	14
Socio-professional category		
Self-employed	77	17
Managers	79	16
Other white collars	80	13
Manual workers	76	16
House persons	72	17
Unemployed	72	18
Retired	75	17
Students	77	14
Difficulties paying bills		
Most of the time	71	20
From time to time	76	16
Almost never/ Never	77	16
Image of the EU		
Total 'Positive'	84	11
Neutral	74	17
Total 'Negative'	57	32
View on agriculture and rural areas in EU		
Important	78	15
Not Important	35	58

III. THE CAP BUDGET AND FINANCIAL AID FOR FARMERS

This third chapter examines Europeans' views about the level of financial aid for farmers. It looks in detail at the reasons justifying the CAP's share of the total EU budget. It then examines whether the general public would like to see a change in future financial support to farmers. It concludes with an overview of opinions on payments given to farmers for implementing environmentally friendly practices.

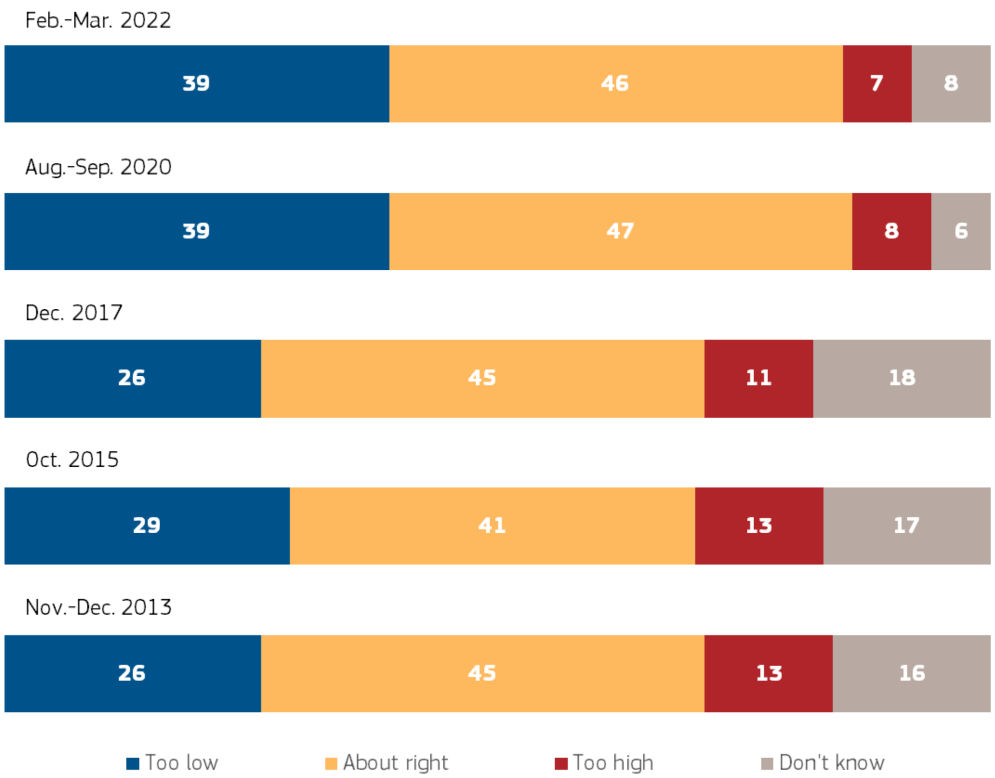
1. Financial aid for farmers

Nearly half of Europeans think that the financial support that the EU gives to farmers to help stabilise their incomes is about right

More than four in ten respondents (46%, -1 percentage point since 2020[35]) consider that **the financial support given by the EU to farmers to help stabilise their incomes is 'about right'**[36]. Meanwhile, close to four in ten respondents (39%, unchanged) believe that this support is 'too low'. Fewer than one in ten (7%, -1) say this support is 'too high'. Almost one in ten (8%, +2) answer 'don't know'.

A longer-term trend analysis shows that the belief that the financial support given by the EU to farmers to help stabilise their incomes is 'about right' is at its second highest level since 2013, with a one-percentage point decrease since 2020. Between 2013 and 2022, the belief that this support is 'too low' has recorded the highest increase, up from 26% in 2013 to 39% in 2022. The 'too high' response is at its lowest level, following a third consecutive decrease (falling from 13% in 2013 to 7% in 2022).

QA9. The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 27 Member States of the EU and around 30% of the total EU budget. Do you think that this support is too low, about right or too high?



[35] Since 2020, the percentage has been updated in the label, which previously read: 'The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 27 Member States of the EU and around <u>35%</u> of the total EU budget.'

[36] QA9. The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1 of the combined public expenditure of the 27 Member States of the EU and around 30 of the total EU budget. Do you think that this support is too low, about right or too high? Too low; About right; Too high; Don't know.

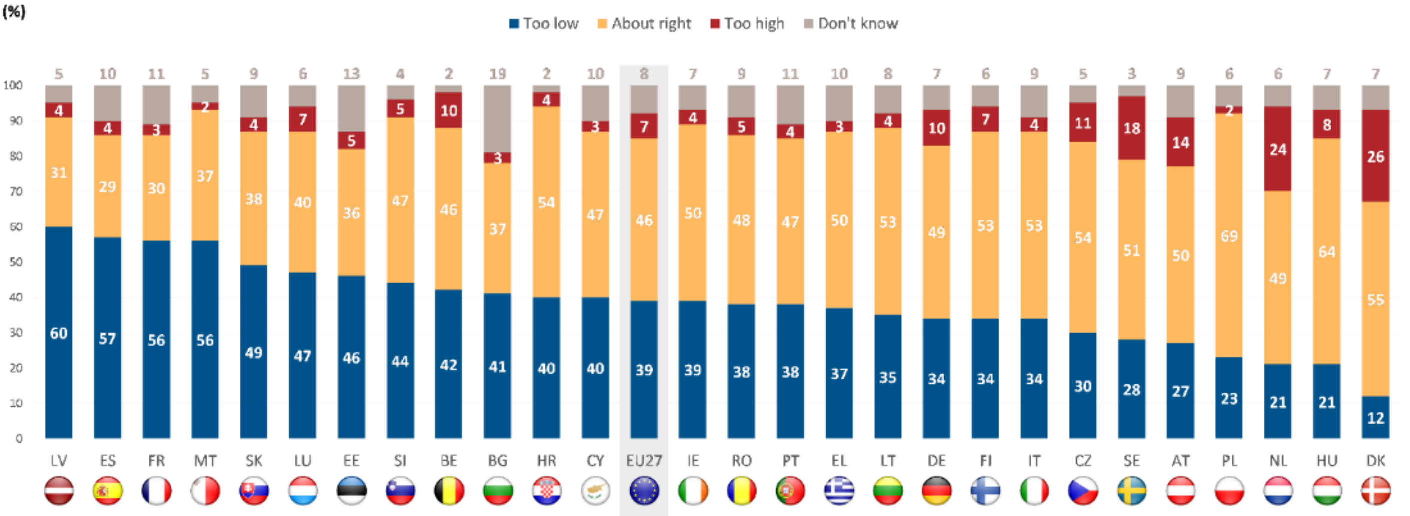
A national analysis reveals that a majority or relative majority of respondents consider that the financial support given by the EU to farmers to help stabilise their incomes is about right in 19 EU Member States, with the highest numbers in Poland (69%), Hungary (64%), and Denmark (55%).

In eight EU Member States, the belief that this support is too low is the majority or relative majority view. This is the case in Latvia (60%), Spain (57%), France and Malta (both 56%), Slovakia (49% versus 38% 'about right'), Luxembourg (47% vs 40%), Estonia (46% vs 36%), and Bulgaria (41% vs 37%).

In all 27 EU Member States, only a minority of respondents think that the EU financial support to farmers is too high. At least one in ten respondents share this opinion in seven countries: Denmark (26%), the Netherlands (24%), Sweden (18%), Austria (14%), Czechia (11%), and Germany and Belgium (both 10%).

In 25 EU Member States, the belief that the EU financial support to farmers is too low is more widespread than the belief that this support is too high, with the greatest differences among respondents in Latvia (60% 'too low' versus 4% 'too high'), Malta (56% vs 2%), Spain (57% vs 4%), and France (56% vs 3%). Conversely, in two countries, respondents are more likely to believe that this support is too high: Denmark (26% 'too high' versus 12% 'too low') and the Netherlands (24% vs 21%).

QA9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 27 Member States of the EU and around 30%
the total EU budget. Do you think that this support is too low, about right or too high?
(%)



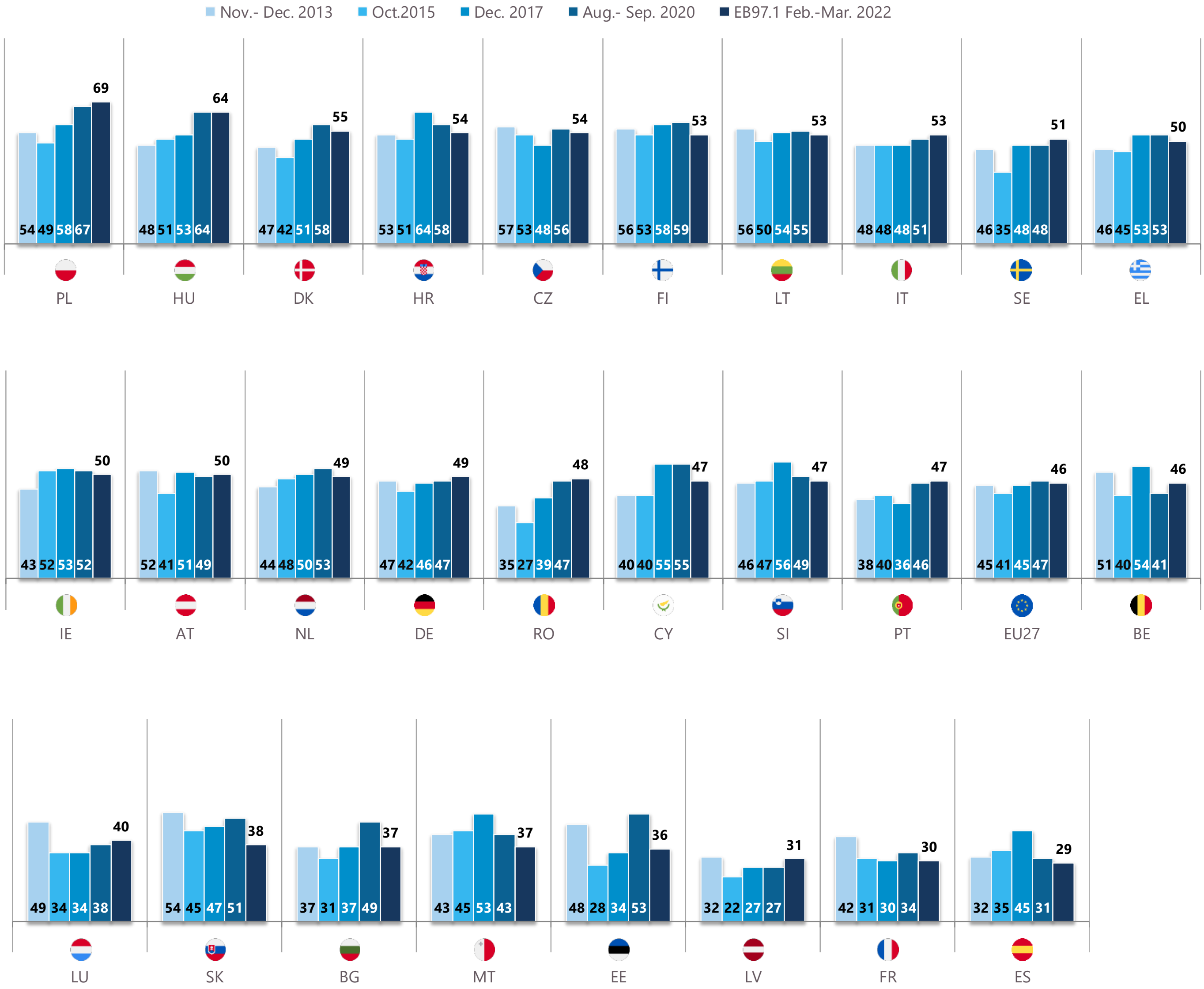
Since 2020, the share of respondents who think that the EU financial support given to farmers to help stabilise their incomes is about right has fallen in 16 EU Member States, including by double digits in Estonia (36%, -17 percentage points), Slovakia (38%, -13), and Bulgaria (37%, -12). Meanwhile, it has risen slightly in ten countries, most notably in Belgium (46%, +5). It remains unchanged in Hungary.

QA9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1 of the combined public expenditure of the 27 Member States of the EU and around 30 of the total EU budget. Do you think that this support is too low, about right or too high?

		EU27	BE	LV	SE	DE	IT	LU	PL	AT	PT	RO	HU	CZ	IE	ES	LT	SI	DK	EL	FR	HR	NL	MT	FI	CY	BG	SK	EE
Too low	Feb/Mar 2022	39	42	60	28	34	34	47	23	27	38	38	21	30	39	57	35	44	12	37	56	40	21	56	34	40	41	49	46
	Δ Aug/Sep 2020	=	▼7	▼3	=	▼2	▼3	▼3	▼3	▲3	▲1	▼7	▼4	▼2	▲2	▼2	▲5	▲3	▼1	▲4	▲4	▲5	▲3	▲26	▲6	▲7	▲5	▲5	▲7
About right	Feb/Mar 2022	46	46	31	51	49	53	40	69	50	47	48	64	54	50	29	53	47	55	50	30	54	49	37	53	47	37	38	36
	Δ Aug/Sep 2020	▼1	▲5	▲4	▲3	▲2	▲2	▲2	▲2	▲1	▲1	▲1	=	▼2	▼2	▼2	▼2	▼2	▼3	▼3	▼4	▼4	▼4	▼6	▼6	▼8	▼12	▼13	▼17
Too high	Feb/Mar 2022	7	10	4	18	10	4	7	2	14	4	5	8	11	4	4	4	5	26	3	3	4	24	2	7	3	3	4	5
	Δ Aug/Sep 2020	▼1	▲2	▲1	▼5	▼2	▼1	▼4	▼1	▼2	=	=	=	▲2	▼7	=	▼1	▼1	▲4	▼3	▼3	▼1	▼3	▲1	▼6	=	▼2	▲2	▼2
Don't know	Feb/Mar 2022	8	2	5	3	7	9	6	6	9	11	9	7	5	7	10	8	4	7	10	11	2	6	5	6	10	19	9	13

A longer-term national analysis reveals that the proportion of respondents who say the EU financial support to farmers is about right has increased in 14 EU Member States since 2013, most dramatically in Hungary (64%, +16 percentage points), Poland (69%, +15), and Romania (48%, +13). Conversely, it has decreased in 12 countries, including by double digits in Slovakia (38%, -16), France (30%, -12), and Estonia (36%, -12). It is unchanged in Bulgaria.

QA9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 27 Member States of the EU and around 35% of the total EU budget. **(% - About Right)**



The socio-demographic data reveal that:

- Respondents aged 15-24 are the most likely to think that the EU financial support to farmers is about right (50%, compared with 45% among those aged 40 and over), and the least likely to say this support is too low (36%, compared with 41% among those aged 40-54);
- Similarly, Europeans who continued in education up to age 20 or beyond are the most likely to say this support is about right (48%, compared with 38% among those who left school at age 15 or earlier) and the least likely to think that it is too low (36% compared with 45%);
- The belief that this financial support is too low is the majority view among unemployed people (49%, compared with 35% among students). Meanwhile, a majority of respondents among all other occupational groups consider that this support is about right, with the highest level among other white-collar workers (51%, compared with 36% among unemployed people);
- Similarly, a relative majority of respondents who have difficulties paying their bills most of the time consider that the EU financial support to farmers is too low (45% versus 39% 'about right'). Conversely, only a minority of respondents share this opinion among respondents who have difficulties paying their bills from time to time (37% vs 49%), or never or almost never (39% vs 46%);
- Respondents who live in a large town are the most likely to consider that this support is about right (50%, compared with 43% among those living in a rural village), but they are the least likely to say it is too low (35% compared with 42%).

In addition, a relative majority of respondents who have a positive image of the European Union believe that the EU financial support to farmers to help stabilise their incomes is about right (50% versus 37% 'too low'), while a minority of those with a negative image of the EU share this opinion (33% vs 47%).

Europeans who consider that agriculture and rural areas are important for the future in the EU are more likely to think that this financial support is too low (40%, compared with 22% of those who think agriculture and rural areas are not important), and less likely to say it is too high (6% compared with 19%).

A relative majority of respondents who consider that the CAP benefits all European citizens and not only farmers think that the EU financial support to farmers is about right (50% versus 39% 'too low'). Meanwhile, those who disagree that the CAP benefits all European citizens are divided (38% vs 38%).

QA9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 27 Member States of the EU and around 30% of the total EU budget. Do you think that this support is too low, about right or too high? (% - EU)

	Too low	About right	Too high	Don't know
EU27	39	46	7	8
Age				
15-24	36	50	4	10
25-39	40	47	7	6
40-54	41	45	7	7
55 +	38	45	7	10
Education (End of)				
15-	45	38	5	12
16-19	39	47	6	8
20+	36	48	9	7
Still studying	35	50	5	10
Socio-professional category				
Self-employed	39	43	8	10
Managers	36	48	11	5
Other white collars	36	51	7	6
Manual workers	42	46	5	7
House persons	41	44	6	9
Unemployed	49	36	6	9
Retired	38	45	7	10
Students	35	50	5	10
Difficulties paying bills				
Most of the time	45	39	6	10
From time to time	37	49	6	8
Almost never/ Never	39	46	7	8
Subjective urbanisation				
Rural village	42	43	6	9
Small/ mid size town	39	46	7	8
Large town	35	50	7	8
Image of the EU				
Total 'Positive'	37	50	6	7
Neutral	39	47	6	8
Total 'Negative'	47	33	11	9
View on agriculture and rural areas in EU				
Important	40	46	6	8
Not Important	22	52	19	7
Common Agricultural Policy (CAP) benefits citizens				
Agree	39	50	5	6
Disagree	38	38	17	7

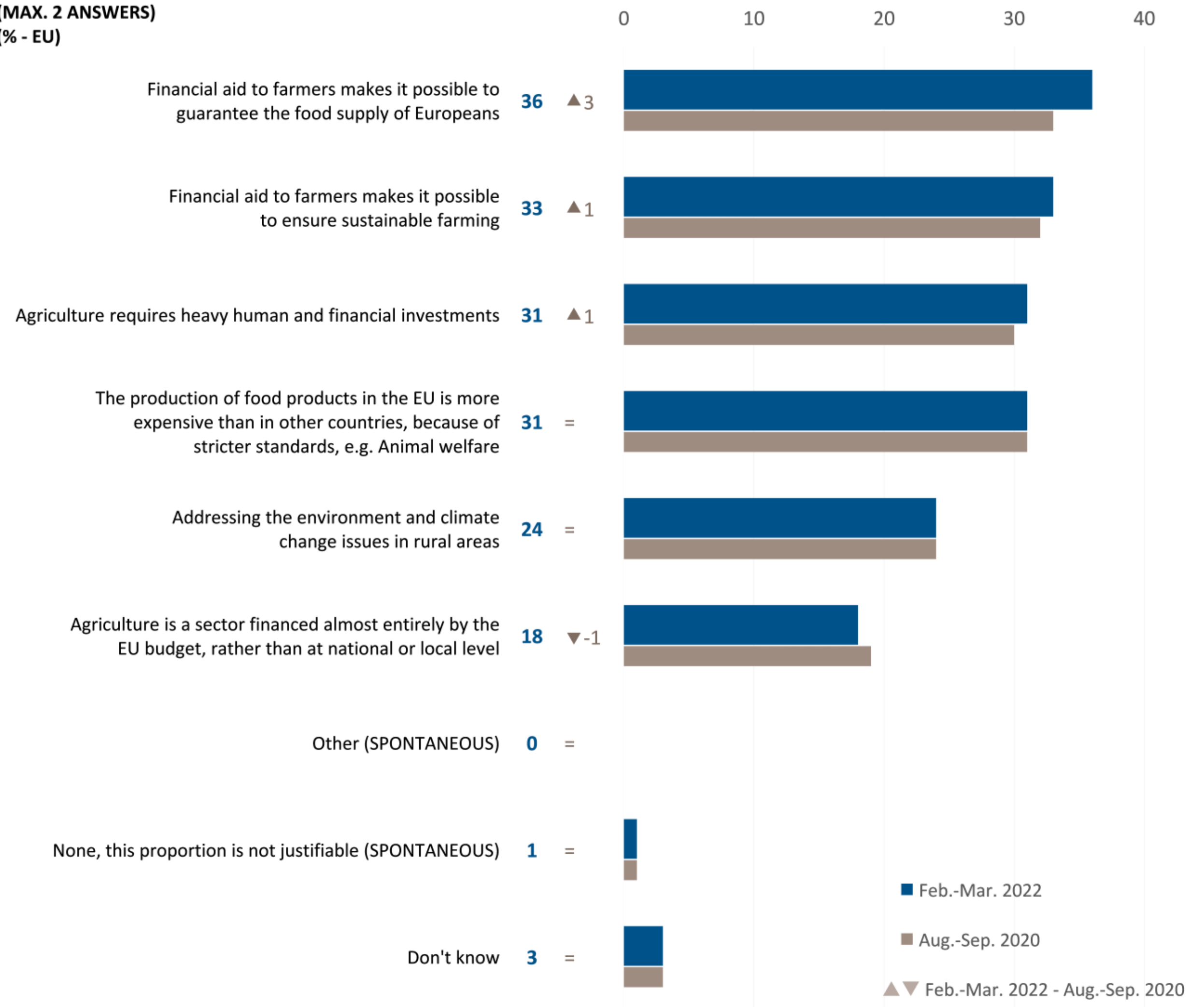
2. Reasons justifying the CAP's share of the total EU budget

More than a third of Europeans think that one of the main reasons why the EU spends a significant proportion of its budget on the CAP is to guarantee the food supply of Europeans

Respondents were asked to identify the main reasons why the EU spends a significant proportion of its budget on the CAP by choosing up to two items from a list of six[37]:

- Nearly four in ten Europeans consider that **'financial aid to farmers makes it possible to guarantee the food supply of Europeans'** (36%, +3 percentage points since 2020[38]) is one of the two main reasons why the EU spends a significant proportion of its budget on the CAP;
- More than three in ten respondents mention the three following topics: **'financial aid to farmers makes it possible to ensure sustainable farming'** (33%, +1), **'agriculture requires heavy human and financial investments'** (31%, +1), and **'the production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare'** (31%, unchanged);
- Close to a quarter of Europeans cite **'addressing the environment and climate change issues in rural areas'** (24%, =);
- Fewer than one in five respondents consider that **'agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level'** (18%, -1) is one of the two main reasons why the EU spends a significant proportion of its budget on the CAP.

QA10 What do you think are the main reasons why the EU spends a significant proportion of its budget (around 30% of the total EU budget) on the Common Agricultural Policy (CAP)?
(MAX. 2 ANSWERS)
(% - EU)



[37] QA10. What do you think are the main reasons why the EU spends a significant proportion of its budget (around 30% of the total EU budget) on the Common Agricultural Policy (CAP)? (MAX. 2 ANSWERS) Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level; Financial aid to farmers makes it possible to guarantee the food supply of Europeans; Agriculture requires heavy human and financial investments; Financial aid to farmers makes it possible to ensure sustainable farming; The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare; Addressing the environment and climate change issues in rural areas; Other (SPONTANEOUS); None, this proportion is not justifiable (SPONTANEOUS); Don't know.

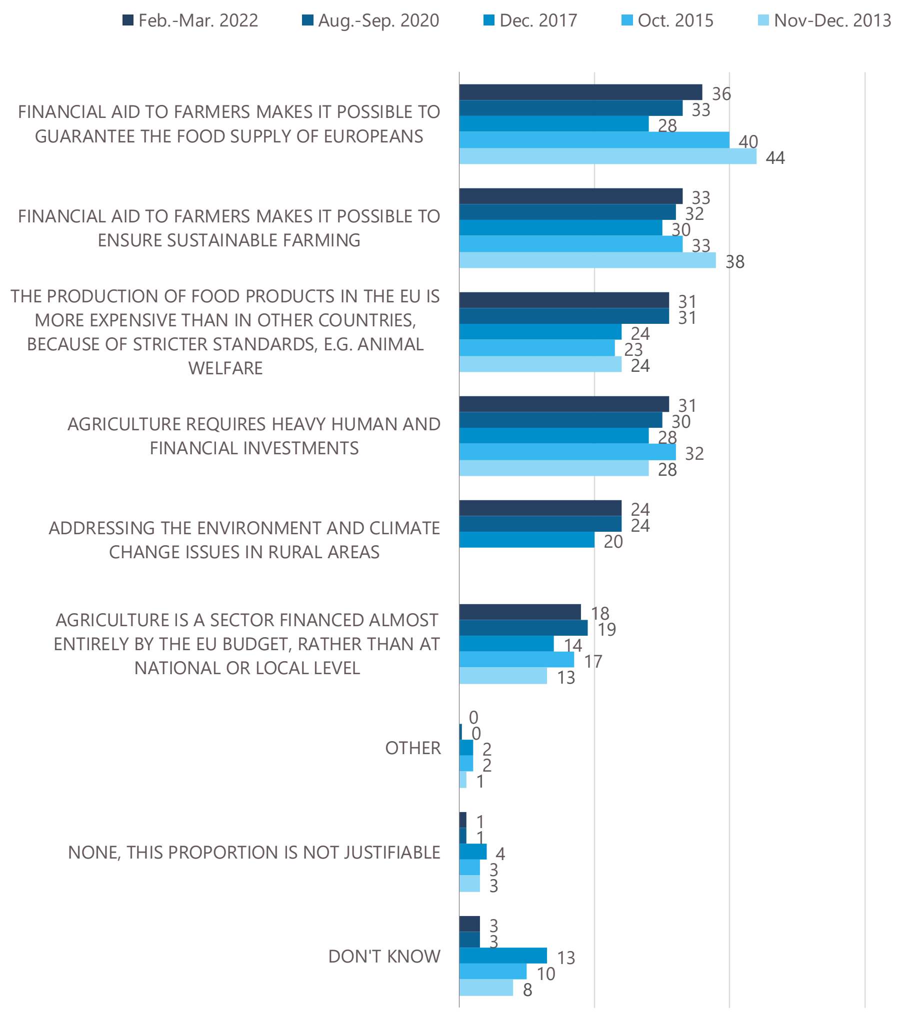
[38] Since 2020, the percentage has been updated in the question, which previously read: 'What do you think are the main reasons why the EU spends a significant proportion of its budget (around 35% of the total EU budget) on the Common Agricultural Policy (CAP)?'

Since 2013, the proportions of respondents who mention **'financial aid to farmers makes it possible to guarantee the food supply of Europeans'** (down from 44% in 2013 to 36% in 2022) and **'financial aid to farmers makes it possible to ensure sustainable farming'** (down from 38% to 33%) have decreased. However, both reasons have recorded their second consecutive rise since 2017.

However, the shares of respondents who cite three other reasons have risen. This is the case with **'the production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare'** (up from 24% in 2013 to 31% in 2022), **'agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level'** (up from 13% to 18%), and **'agriculture requires heavy human and financial investments'** (up from 28% to 31%).

'Addressing the environment and climate change issues in rural areas' has gained four percentage points since 2017 (up from 20% to 24%), when this statement was first introduced to the survey.

QA10 What do you think are the main reasons why the EU spends a significant proportion of its budget (around 30% of the total EU budget) on the Common Agricultural Policy (CAP)?
(% - EU)



A national analysis reveals that **'financial aid to farmers makes it possible to guarantee the food supply of Europeans'** comes in first position among reasons why the EU spends a significant proportion of its budget on the CAP in 14 EU Member States, with the highest numbers in Finland (50%), the Netherlands (49%), and Sweden (45%).

In seven EU Member States, **'financial aid to farmers makes it possible to ensure sustainable farming'** is the most cited reason. This is the case among respondents in Estonia and Latvia (both 44%), Czechia (41%), Cyprus (40%), Slovenia (38%), Slovakia (34%), and Romania (33%).

'Agriculture requires heavy human and financial investments' comes first in four EU Member States: Lithuania (49%), Bulgaria (44%), France (38%), and Hungary (36%). It is also commonly cited by respondents in Greece (39%), Spain and Portugal (both 37%), and Slovenia (36%).

'The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare' is the most mentioned reason by respondents in Luxembourg (39%). It is also commonly cited in Czechia (39%), Germany and Denmark (both 38%), and Finland (37%).

'Addressing the environment and climate change issues in rural areas' tops the ranking in Italy (35%). It is also commonly cited by respondents in Cyprus (34%), the Netherlands (29%), and Austria and Hungary (both 27%).

'Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level' does not top the rankings of the main reasons why the EU spends a significant proportion of its budget on the CAP in any of the 27 EU Member States. However, at least a quarter of respondents mention this reason in Austria and Lithuania (both 26%), and Hungary (25%).

QA10 What do you think are the main reasons why the EU spends a significant proportion of its budget (around 30 of the total EU budget) on the Common Agricultural Policy (CAP)? (MAX. 2 ANSWERS)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Financial aid to farmers makes it possible to guarantee the food supply of Europeans	**36**	**39**	29	33	**44**	**39**	32	**44**	**44**	**38**	30	**39**	31	39	34	29	36	32	**39**	**49**	**35**	**36**	**39**	32	33	33	**50**	**45**
Financial aid to farmers makes it possible to ensure sustainable farming	33	34	28	**41**	26	32	**44**	39	38	30	33	37	32	**40**	**44**	22	35	29	36	38	34	30	33	**33**	**38**	**34**	32	35
Agriculture requires heavy human and financial investments	31	32	**44**	25	19	23	29	22	39	37	**38**	35	34	33	29	**49**	32	**36**	35	*15*	*20*	35	37	31	36	31	26	20
The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. Animal welfare	31	35	24	39	38	38	36	31	27	24	31	*21*	28	31	27	30	**39**	28	25	36	33	26	19	25	29	32	37	35
Addressing the environment and climate change issues in rural areas	24	20	*18*	17	*18*	26	*11*	23	26	17	22	23	**35**	34	*16*	*12*	19	27	25	29	27	24	20	21	*15*	*19*	*13*	*16*
Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level	*18*	*17*	23	*14*	23	*17*	15	*21*	*20*	*16*	*17*	24	*17*	*16*	17	26	*17*	*25*	*15*	*15*	26	*20*	*13*	*19*	19	21	16	23
Other (SPONTANEOUS)	0	0	0	0	0	1	0	0	0	1	1	0	0	0	0	1	0	0	0	0	2	0	1	0	0	0	0	0
None, this proportion is not justifiable (SPONTANEOUS)	1	1	1	0	0	1	1	0	0	1	1	0	0	0	0	1	0	0	0	1	1	0	0	0	0	1	0	1
Don't know	3	1	6	2	3	2	6	2	0	3	5	1	5	1	2	2	0	1	2	1	3	3	8	4	2	2	2	1

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

Since 2020, national changes of more than five percentage points have been recorded for the six reasons tested:

- The share of respondents who chose the item '**financial aid to farmers makes it possible to guarantee the food supply of Europeans'** has increased in 15 EU Member States, most notably in Greece (44%, +9 percentage points). Conversely, it has decreased by up to four percentage points in 11 countries;
- **'Financial aid to farmers makes it possible to ensure sustainable farming'** has gained ground in 13 EU Member States, particularly Greece (38%, +8). However, it has lost ground in eight countries, most notably Estonia (44%, -7);
- The proportion of respondents who mention '**agriculture requires heavy human and financial investments'** has fallen in 11 EU Member States, particularly in Slovenia (36%, -8). Meanwhile, it has risen in ten countries, including by double digits in Finland (26%, +10);
- **'The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare'** has gained ground in 16 EU Member States, most notably in Czechia (39%, +9) and Cyprus (31%, +9). It has lost ground in eight countries, most notably Austria (33%, -7) and Spain (24%, -7);
- The share of respondents who cite **'addressing the environment and climate change issues in rural areas'** has risen in 14 EU Member States, most dramatically in Malta (25%, +10) and Ireland (23%, +10). Conversely, it has fallen in nine countries, most notably Czechia (17%, -6);
- **'Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level'** has lost ground in 15 EU Member States, most notably in Finland (16%, -7). Meanwhile, it has gained ground slightly in eight countries, particularly Austria and Lithuania (26%, +5 in both countries).

QA10 What do you think are the main reasons why the EU spends a significant proportion of its budget (around 30 of the total EU budget) on the Common Agricultural Policy (CAP)? (MAX. 2 ANSWERS)
(%)

		EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Financial aid to farmers makes it possible to guarantee the food supply of Europeans	Feb/Mar 2022	36	39	29	33	44	39	32	44	44	38	30	39	31	39	34	29	36	32	39	49	35	36	39	32	33	33	50	45
	Δ Aug/Sep 2020	▲3	▲5	▼4	▼1	▲3	▲5	▲5	▼1	▲9	▲3	▲4	▼2	▲4	▲5	▲4	▼2	▼4	▲2	▼1	▲4	▼2	▲4	▼2	▲1	=	▼2	▼1	▲6
Financial aid to farmers makes it possible to ensure sustainable farming	Feb/Mar 2022	33	34	28	41	26	32	44	39	38	30	33	37	32	40	44	22	35	29	36	38	34	30	33	33	38	34	32	35
	Δ Aug/Sep 2020	▲1	▲4	▼4	▲7	▼5	=	▼7	▲1	▲8	▲4	=	▼3	▲2	=	▲4	▼3	▲3	=	▲2	=	▲3	▼2	▲1	▼1	▲1	=	▼4	▲1
Agriculture requires heavy human and financial investments	Feb/Mar 2022	31	32	44	25	19	23	29	22	39	37	38	35	34	33	29	49	32	36	35	15	20	35	37	31	36	31	26	20
	Δ Aug/Sep 2020	▲1	=	=	▼5	▼5	▲2	▼1	▼1	▼2	▲1	▲4	▲2	▲1	▼3	▼2	▲2	▲5	=	▲5	▲1	▼3	=	▼5	=	▼8	▼6	▲10	=
The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. Animal welfare	Feb/Mar 2022	31	35	24	39	38	38	36	31	27	24	31	21	28	31	27	30	39	28	25	36	33	26	19	25	29	32	37	35
	Δ Aug/Sep 2020	=	▼2	▲1	▲9	▲1	=	▼5	▼6	▼1	▼7	=	▲1	▲3	▲9	▲2	▲3	▼2	▲2	▲8	▼2	▼7	▲3	=	▲2	▲6	▲2	▲1	▲2
Addressing the environment and climate change issues in rural areas	Feb/Mar 2022	24	20	18	17	18	26	11	23	26	17	22	23	35	34	16	12	19	27	25	29	27	24	20	21	15	19	13	16
	Δ Aug/Sep 2020	=	=	▼1	▼6	▼5	▲2	▼2	▲10	▼4	▲2	▼5	▲5	=	▲3	▲2	▼3	=	▼1	▲10	▲2	▲5	▼2	▲3	=	▲2	▲2	▲3	▲3
Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level	Feb/Mar 2022	18	17	23	14	23	17	15	21	20	16	17	24	17	16	17	26	17	25	15	15	26	20	13	19	19	21	16	23
	Δ Aug/Sep 2020	▼1	▲1	▼1	▼3	▲1	▼3	▼3	=	▼1	▼1	▲1	▲2	▼2	=	=	▲5	▼1	▼1	=	▼4	▲5	▲1	▼1	▼4	▲3	▼1	▼7	▼5
Other (SPONTANEOUS)	Feb/Mar 2022	0	0	0	0	0	1	0	0	0	1	1	0	0	0	0	1	0	0	0	0	2	0	1	0	0	0	0	0
	Δ Aug/Sep 2020	=	=	=	=	▼1	▲1	=	=	▼1	▲1	=	=	=	=	▼1	=	=	=	=	=	=	=	▲1	=	▼1	=	=	=
None, this proportion is not justifiable (SPONTANEOUS)	Feb/Mar 2022	1	1	1	0	0	1	1	0	0	1	1	0	0	0	0	1	0	0	0	1	1	0	0	0	0	1	0	1
	Δ Aug/Sep 2020	=	▲1	▲1	=	▼1	=	▲1	=	=	▲1	=	=	▼1	▼1	=	=	=	=	▼1	=	▼2	=	=	=	=	=	=	=
Don't know	Feb/Mar 2022	3	1	6	2	3	2	6	2	0	3	5	1	5	1	2	2	0	1	2	1	3	3	8	4	2	2	2	1

The socio-demographic data reveal that:

- Respondents aged 25-39 (21%) are the most likely to say '**agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level'** compared with 13% among those aged 15-24;
- Europeans who left school at age 15 or earlier are more likely than those who continued in education up to age 20 or beyond to cite that '**agriculture requires heavy human and financial investments'** (35% versus 30%), but they are less likely to say '**the production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare'** (24% vs 33%);
- Managers are the most likely to mention '**the production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare'**, particularly when compared with house persons (36% compared with 28%);
- Respondents who have difficulties paying their bills most of the time are the least likely to cite '**addressing the environment and climate change issues in rural areas'** (19%, compared with 27% among those who have such difficulties from time to time) and '**financial aid to farmers makes it possible to ensure sustainable farming'** (27%, compared with 33% among those who have never or almost never such difficulties);

Moreover, respondents who believe that agriculture and rural areas are important for the future in the European Union are more likely to mention all the reasons but one. For instance, they are far more likely to cite **'financial aid to farmers makes it possible to ensure sustainable farming'** (37%, compared with 26% among those who say agriculture and rural areas are not important); but they are the least likely to say '**agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level'** (18% compared with 26%).

Europeans who agree that the CAP benefits all European citizens and not only farmers are more likely than those who disagree to say '**financial aid to farmers makes it possible to ensure sustainable farming'** (35% compared with 25%) and '**financial aid to farmers makes it possible to guarantee the food supply of Europeans'** (38% compared with 32%), but they are less likely to cite '**agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level'** (17% compared with 23%).

QA10 What do you think are the main reasons why the EU spends a significant proportion of its budget (around 30% of the total EU budget) on the Common Agricultural Policy (CAP)? (MAX. 2 ANSWERS) (% - EU)

	Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level	Financial aid to farmers makes it possible to guarantee the food supply of Europeans	Agriculture requires heavy human and financial investments	Financial aid to farmers makes it possible to ensure sustainable farming	The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. Animal welfare	Addressing the environment and climate change issues in rural areas
EU27	18	36	31	33	31	24
Age						
15-24	13	37	32	32	30	27
25-39	21	36	31	30	33	23
40-54	19	35	30	34	31	24
55 +	17	36	32	33	29	24
Education (End of)						
15-	16	37	35	32	24	23
16-19	18	35	32	33	31	26
20+	20	37	30	33	33	22
Still studying	14	37	30	33	31	27
Socio-professional category						
Self-employed	17	36	31	33	32	23
Managers	20	38	28	32	36	23
Other white collars	21	36	31	32	30	27
Manual workers	19	36	33	32	30	23
House persons	18	37	30	29	28	22
Unemployed	16	36	33	34	31	21
Retired	16	36	33	34	29	24
Students	14	37	30	33	31	27
Difficulties paying bills						
Most of the time	17	38	33	27	31	19
From time to time	18	35	33	32	29	27
Almost never/ Never	18	36	31	33	31	23
Subjective urbanisation						
Rural village	17	36	33	32	28	23
Small/ mid size town	19	36	31	32	32	25
Large town	18	37	30	33	31	24
View on agriculture and rural areas in EU						
Important	18	37	32	33	31	24
Not Important	26	26	27	24	28	19
Common Agricultural Policy (CAP) benefits citizens						
Agree	17	38	31	35	31	25
Disagree	23	32	31	25	32	20

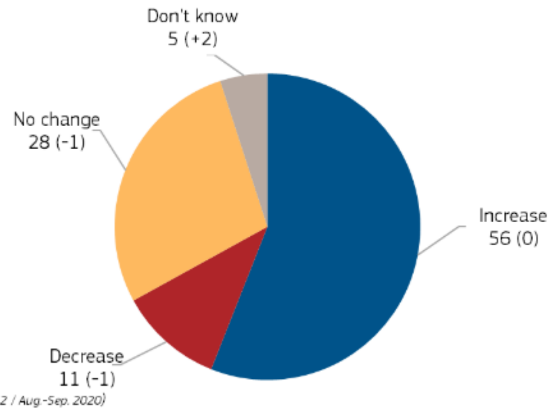
3. Future financial support to farmers

Almost six in ten Europeans would like to see an increase in EU financial support to farmers over the next ten years

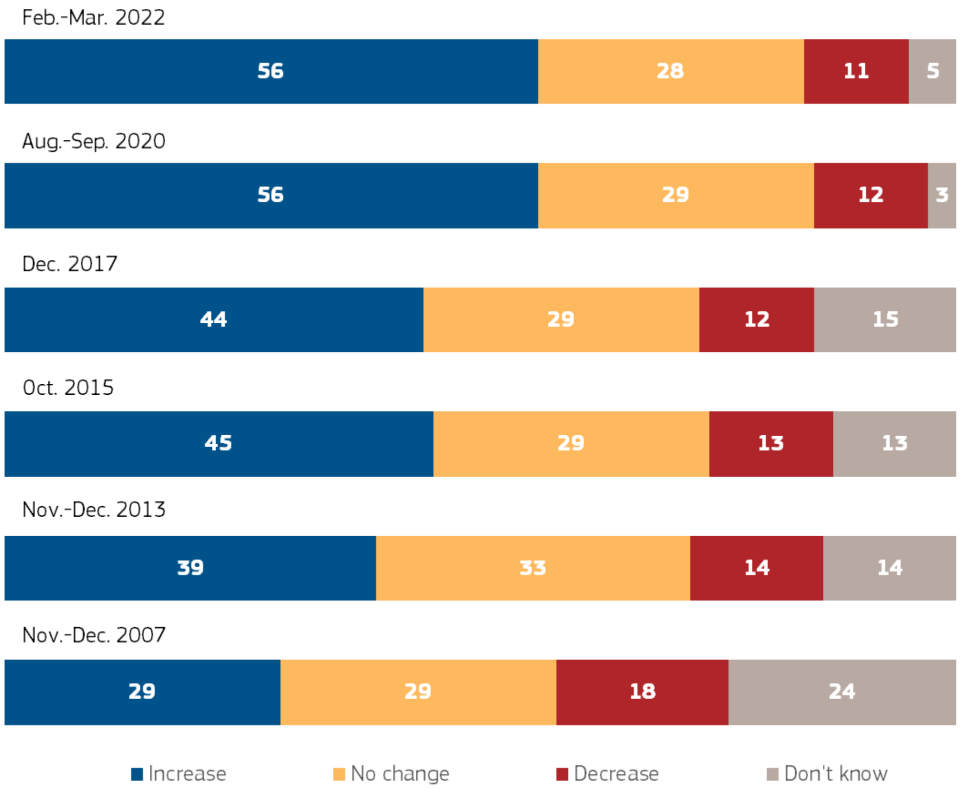
More than half of respondents (56%, unchanged since 2020) **would like to see an 'increase' in EU financial support to farmers over the next ten years**[39]. However, almost three in ten (28%, -1 percentage point) would like to see 'no change' in the EU financial support, and slightly more than one in ten (11%, -1) favour decreased support. Just 5% (+2) say they 'don't know'.

A longer-term trend analysis reveals that the share of respondents who would like to see an increase in EU financial support to farmers has gained ground dramatically since 2007 (+27 percentage points, up from 29% in 2007 to 56% in 2022). Conversely, the proportion of respondents who would like to see a decrease in this support has lost ground (-7, down from 18% to 11%). At the same time, the level of 'don't know' has decreased sharply (-19, down from 24% to 5%).

QA11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?
(% - EU)



QA11. And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?



[39] QA11. And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers? Increase; Decrease; No change; Don't know.

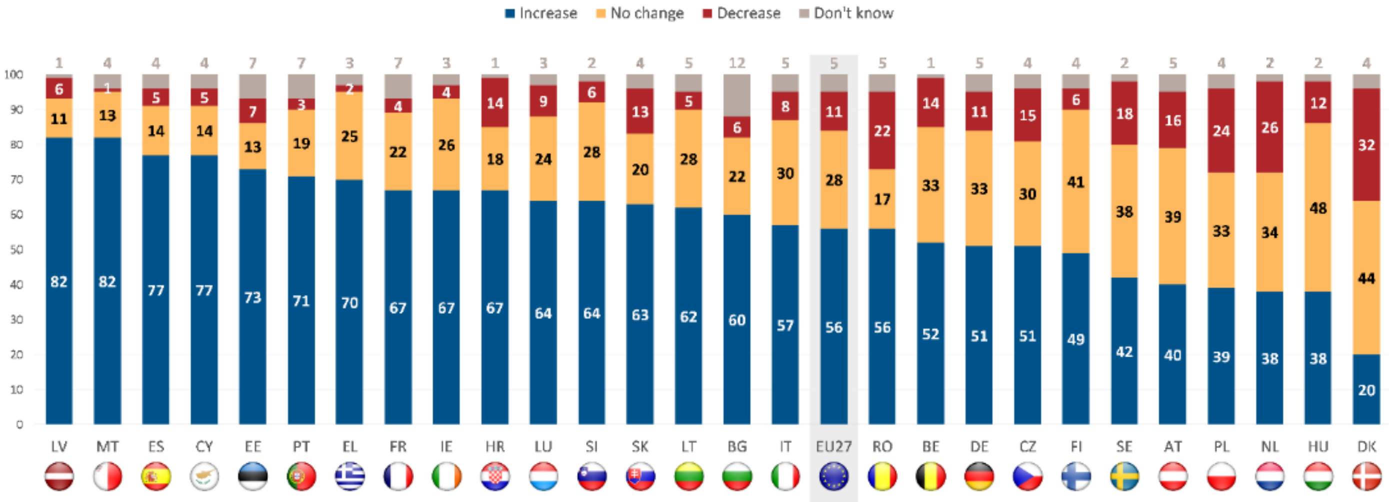
A national analysis reveals that a majority or relative majority of respondents in 25 EU Member States would like to see an increase in EU financial support to farmers over the next ten years. More than three-quarters of respondents hold this view in Latvia and Malta (both 82%), and Spain and Cyprus (both 77%).

In two EU Member States, a relative majority of respondents would like to see no change in this support: Hungary (48%) and Denmark (44%). More than four in ten respondents also share this opinion in Finland (41%).

The belief that EU financial support to farmers should decrease over the next ten years is a minority view in all 27 EU Member States. However, more than one in five respondents share this opinion in Denmark (32%), the Netherlands (26%), Poland (24%), and Romania (22%).

Denmark is the only EU Member States where the proportion of respondents who would like to see a decrease in EU financial support to farmers is higher than the proportion of respondents who would like to see an increase in this support (32% 'decrease' versus 20% 'increase'). In the 26 other countries, respondents are much more likely to say EU financial support should increase than they are to say it should decrease, with the largest gaps in Malta (82% 'increase' versus 1% 'decrease'), Latvia (82% vs 6%), and Spain and Cyprus (77% vs 5% in both countries).

QA11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers? (%)



Since 2020, the proportion of respondents who would like to see an increase in EU financial support to farmers over the next ten years has risen in 17 EU Member States, most dramatically in Malta (82%, +15 percentage points). Conversely, it has fallen in nine countries, including by double digits in Romania (56%, -11) and Belgium (52%, -10). It remains unchanged in Spain.

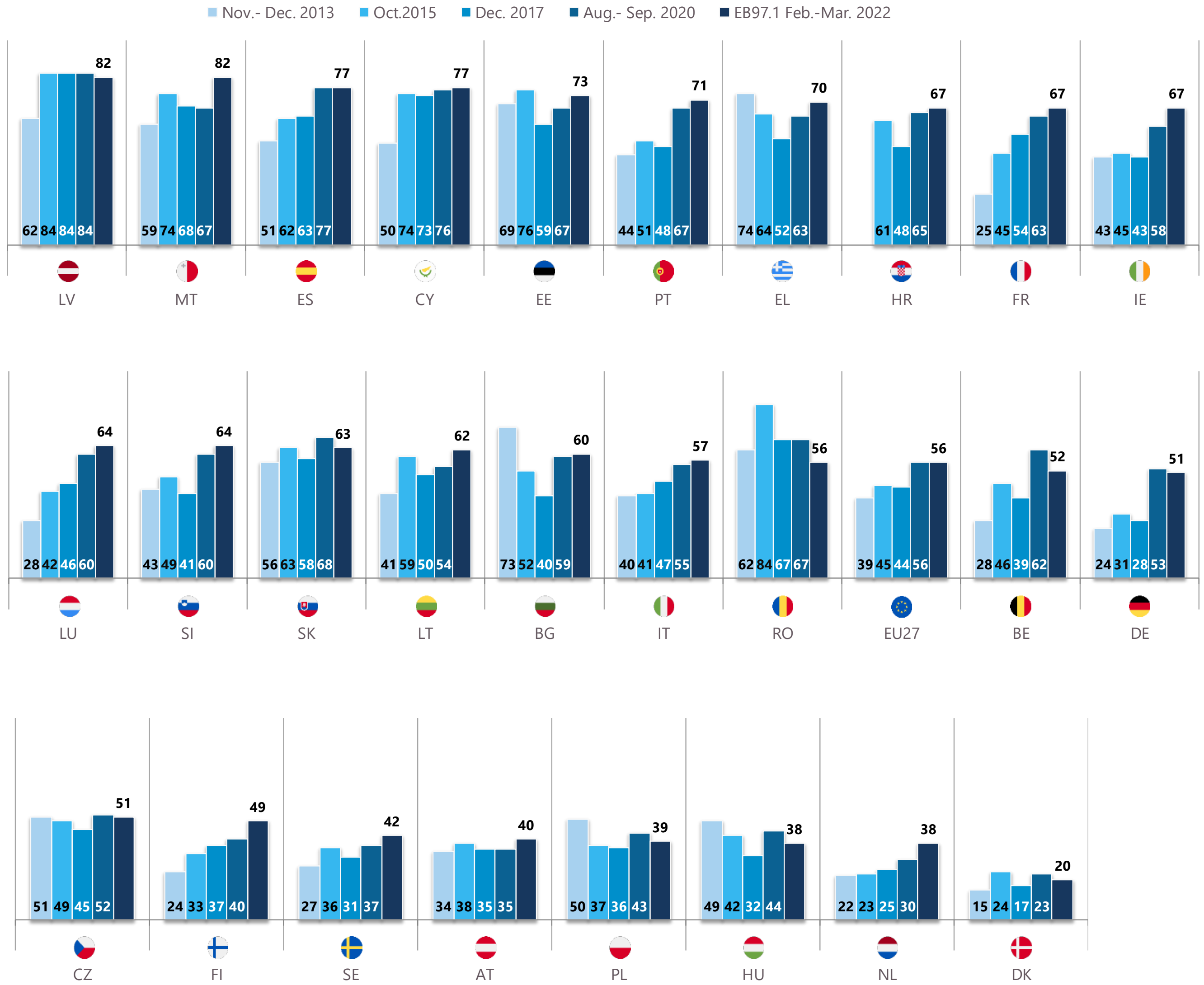
QA11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?
(%)

		EU27	MT	IE	FI	LT	NL	EL	EE	AT	SE	FR	LU	PT	SI	HR	IT	BG	CY	ES	CZ	DE	LV	DK	PL	SK	HU	BE	RO
Increase	Feb/Mar 2022	56	82	67	49	62	38	70	73	40	42	67	64	71	64	67	57	60	77	77	51	51	82	20	39	63	38	52	56
	Δ Aug/Sep 2020	=	▲15	▲9	▲9	▲8	▲8	▲7	▲6	▲5	▲5	▲4	▲4	▲4	▲4	▲2	▲2	▲1	▲1	=	▼1	▼2	▼2	▼3	▼4	▼5	▼6	▼10	▼11
Decrease	Feb/Mar 2022	11	1	4	6	5	26	2	7	16	18	4	9	3	6	14	8	6	5	5	15	11	6	32	24	13	12	14	22
	Δ Aug/Sep 2020	▼1	▼2	▼8	▼10	▼3	▼6	▼2	▼3	▼3	▼7	▼3	▼1	▼1	▼1	▲4	=	=	▲2	=	▲4	▼1	▲4	▲5	▲5	▲9	=	▲6	▲2
No change	Feb/Mar 2022	28	13	26	41	28	34	25	13	39	38	22	24	19	28	18	30	22	14	14	30	33	11	44	33	20	48	33	17
	Δ Aug/Sep 2020	▼1	▲4	▼4	▼3	▼5	▼3	▼5	▼10	▲1	▲1	▼4	▼6	=	▼3	▼6	▼2	▼7	▼2	▼2	▼6	▲1	▲1	▼3	▼2	▼5	▲5	▲4	▲5
Don't know	Feb/Mar 2022	5	4	3	4	5	2	3	7	5	2	7	3	7	2	1	5	12	4	4	4	5	1	4	4	4	2	1	5

A longer-term trend analysis reveals that, since 2013[40], the share of respondents who would like to see an increase in EU financial support to farmers over the next ten years has gained ground in 20 EU Member States, including by double digits in 16 countries, most dramatically in France (67%, +42 percentage points), Luxembourg (64%, +36), Cyprus (77%, +27), Portugal (71%, +27), and Germany (51%, +27). Conversely, it has lost ground in five countries: Bulgaria (60%, -13), Poland (39%, -11), Hungary (38%, -11) and, to a lesser extent, Romania (56%, -6), and Greece (70%, -4). It is unchanged in Czechia.

[40] Croatia is not included in 2013 as it was not part of the EU when the survey was conducted.

QA11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?
(% - Increase)



The socio-demographic data reveal that a majority of respondents would like to see an increase in EU financial support to farmers over the next ten years in all socio-demographic categories. However:

- Respondents who left school at age 15 or earlier are much more likely than those who continued in education up to age 20 or beyond to say they would like an increase in EU financial support to farmers (63% compared with 53%);
- Unemployed people (65%) and house persons (62%) are more likely than managers (53%), other white-collar workers (54%), and retired people (54%) to share this opinion;
- Europeans who have difficulties paying their bills most of the time are the most likely to hold this view, particularly when compared with those who have such difficulties from time to time (64% compared with 54%);

In addition, only a minority of Europeans who consider that agriculture and rural areas are not important for the future in the European Union would like to see an increase in EU financial support to farmers over the next ten years (28% versus 41% 'decrease' and 29% 'no change'). However, nearly six in ten of those who consider that agriculture and rural areas are important would like to see an increase in the EU financial support (58%).

QA11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers? (% - EU)

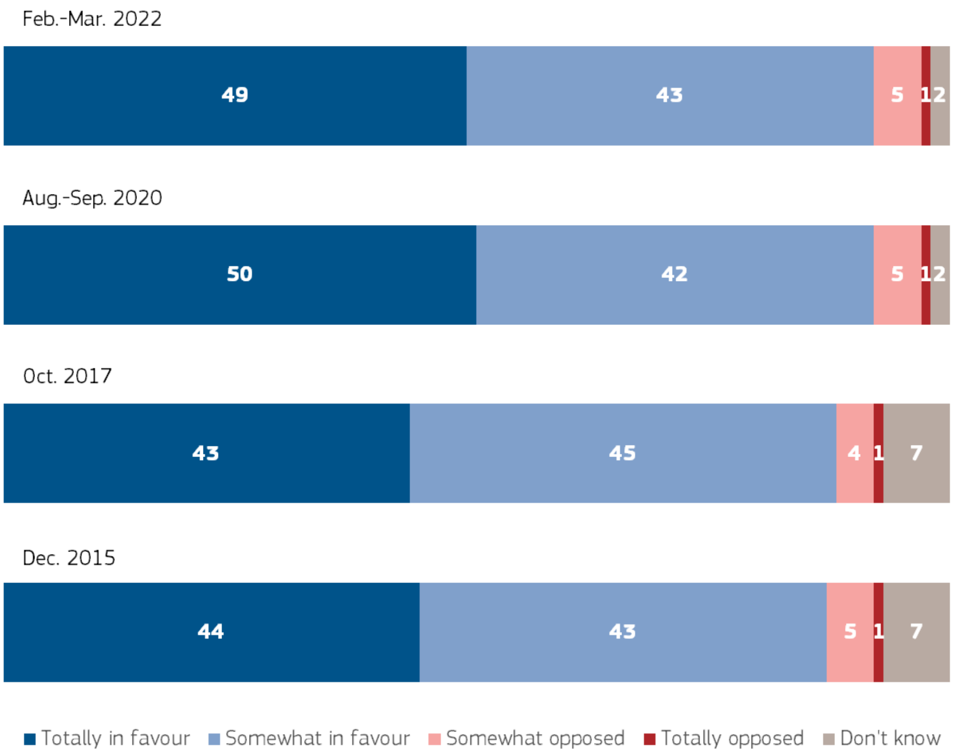
	Increase	Decrease	No change	Don't know
EU27	56	11	28	5
Education (End of)				
15-	63	7	23	7
16-19	56	11	29	4
20+	53	13	29	5
Still studying	59	9	27	5
Socio-professional category				
Self-employed	58	12	25	5
Managers	53	13	30	4
Other white collars	54	14	28	4
Manual workers	58	12	27	3
House persons	62	9	24	5
Unemployed	65	8	21	6
Retired	54	10	30	6
Students	59	9	27	5
Difficulties paying bills				
Most of the time	64	10	20	6
From time to time	54	13	28	5
Almost never/ Never	57	10	28	5
View on agriculture and rural areas in EU				
Important	58	10	27	5
Not Important	28	41	29	2

4. Opinions on payments given to farmers for implementing environmentally-friendly practices

More than nine in ten Europeans are in favour of the EU continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment

More than nine in ten respondents (92%, unchanged since 2020) answer that they are **in favour of the European Union continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment**[41]. This score includes close to half of respondents (49%, -1 percentage point) who say they are 'totally in favour' of these payments and more than four in ten (43%, +1) who are 'somewhat in favour'. Meanwhile, fewer than one in ten respondents (6%, =) are opposed to the EU continuing to do so. Just 2% (=) say they 'don't know'.

QA15. The EU is currently making subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. Are you in favour or opposed to the EU continuing to do so? (% - EU)

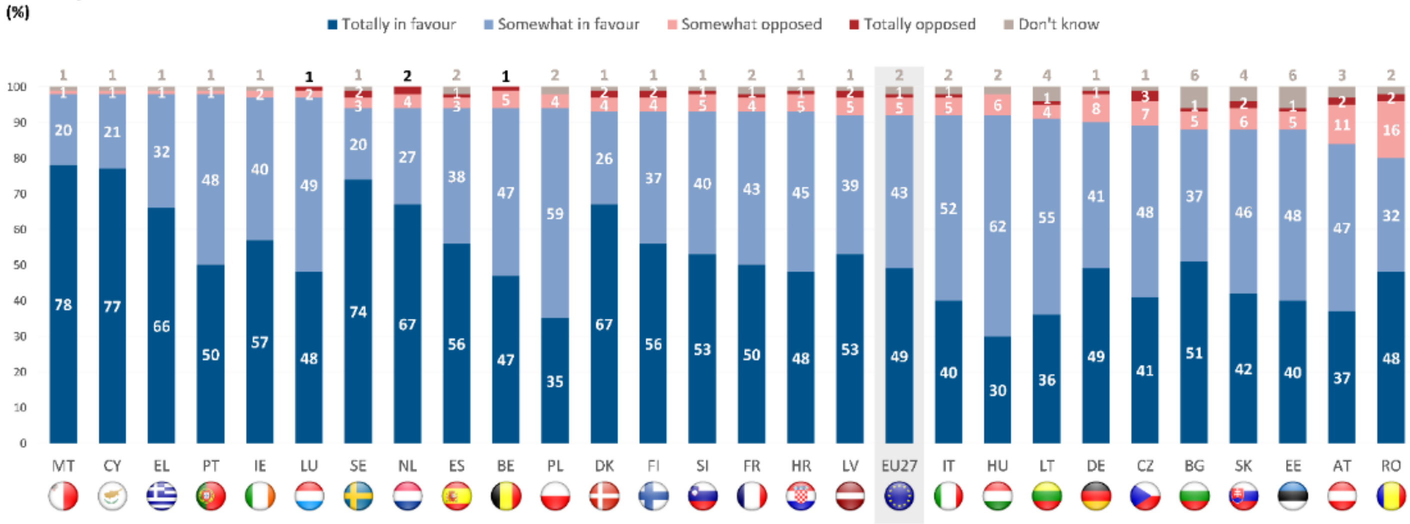


[41] QA15. The EU is currently making subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. Are you in favour or opposed to the EU continuing to do so? Totally in favour; Somewhat in favour; Somewhat opposed; Totally opposed; Don't know.

In all 27 EU Member States, at least eight in ten respondents say they are in favour of the European Union continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. Nearly all respondents share this opinion in Portugal, Greece, Malta, and Cyprus (all 98%). At the other end of the scale, fewer than nine in ten respondents hold this view in Romania (80%), Austria (84%), Bulgaria, Estonia and Slovakia (all 88%), and Czechia (89%).

At least three in ten respondents are totally in favour of the EU continuing to do so in all 27 EU Member States, and more than seven in ten in Malta (78%), Cyprus (77%), and Sweden (74%), compared with fewer than four in ten in Hungary (30%), Poland (35%), Lithuania (36%), and Austria (37%).

QA15 The EU is currently making subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. Are you in favour or opposed to the EU continuing to do so?
(%)



Since 2020, the proportion of respondents who say they are in favour of the EU continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment has increased in 12 EU Member States, most dramatically in Malta (98%, +10 percentage points). Conversely, it has decreased in 11 countries, most notably in Romania (80%, -7). It is unchanged in Spain, Belgium, France, and Slovenia.

QA15 The EU is currently making subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. Are you in favour or opposed to the EU continuing to do so?

		EU27	MT	LU	AT	FI	IT	CZ	EL	IE	CY	HU	PL	PT	BE	ES	FR	SI	LT	NL	SE	LV	DK	DE	BG	EE	SK	HR	RO
Total 'In favour'	Feb/Mar 2022	92	98	97	84	93	92	89	98	97	98	92	94	98	94	94	93	93	91	94	94	92	93	90	88	88	88	93	80
	Δ Aug/Sep 2020	=	▲10	▲4	▲4	▲4	▲3	▲2	▲2	▲1	▲1	▲1	▲1	▲1	=	=	=	=	▼1	▼1	▼1	▼2	▼3	▼3	▼4	▼4	▼4	▼5	▼7
Total 'Opposed'	Feb/Mar 2022	6	1	3	13	6	6	10	1	2	1	6	4	1	6	4	5	6	5	6	5	7	6	9	6	6	8	6	18
	Δ Aug/Sep 2020	=	=	▼4	▼3	▼5	▼1	▼2	▼2	▼2	▼1	▼2	▼2	=	=	▼2	=	=	=	▲1	=	▲3	▲3	▲3	▼1	▼2	▲2	▲4	▲6
Don't know	Feb/Mar 2022	2	1	0	3	1	2	1	1	1	1	2	2	1	0	2	2	1	4	0	1	1	1	1	6	6	4	1	2

The socio-demographic data reveal that, in all socio-demographic categories, more than eight in ten respondents are in favour of the European Union continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. However, a focus on the share of respondents who are **'totally in favour'** of these payments highlights that:

- Respondents who continued in education up to age 20 or beyond (56%) are more likely than those who left school at age 15 or earlier (48%) to be totally in favour of the EU continuing to make subsidy payments;
- Managers (55%) and students (53%) are also more likely to be totally in favour than manual workers (43%);
- Europeans who have difficulties paying their bills from time to time (51%) are the most likely to be totally in favour, particularly when compared with those who have such difficulties most of the time (42%);
- Europeans living in a large town (51%) are more likely than those living in rural villages (46%) to be totally in favour of the EU continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment.

In addition, respondents who have a positive image of the EU (96%) are much more likely than those who have a negative image of the EU (82%) to be in favour of such payments.

Similarly, Europeans who consider that agriculture and rural areas are important for the future in the EU are the most likely to be in favour of these payments (93%, compared with 62% of those who think that agriculture and rural areas are not important), and so are those who consider that the CAP benefits all European citizens and not only farmers (95%, compared with 79% of those who disagree that the CAP benefits all European citizens).

QA15 The EU is currently making subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment. Are you in favour or opposed to the EU continuing to do so? (% - EU)

	Totally in favour	Somewhat in favour	Somewhat opposed	Totally opposed	Don't know	Total 'In favour'	Total 'Opposed'
EU27	49	43	5	1	2	92	6
Education (End of)							
15-	48	43	5	1	3	91	6
16-19	44	48	6	1	1	92	7
20+	56	38	4	1	1	94	5
Still studying	53	41	3	1	2	94	4
Socio-professional category							
Self-employed	48	43	6	2	1	91	8
Managers	55	39	5	1	0	94	6
Other white collars	46	48	4	1	1	94	5
Manual workers	43	48	7	1	1	91	8
House persons	47	43	6	1	3	90	7
Unemployed	51	40	5	2	2	91	7
Retired	51	40	6	1	2	91	7
Students	53	41	3	1	2	94	4
Difficulties paying bills							
Most of the time	42	48	7	1	2	88	9
From time to time	51	42	4	1	2	90	8
Almost never/ Never	47	41	8	1	3	93	5
Image of the EU							
Total 'Positive'	56	40	3	0	1	96	3
Neutral	43	48	6	1	2	91	7
Total 'Negative'	40	42	12	4	2	82	16
View on agriculture and rural areas in EU							
Important	50	43	4	1	2	93	5
Not Important	19	43	31	6	1	62	37

IV. ATTITUDES TOWARDS INTERNATIONAL TRADE IN AGRICULTURAL PRODUCTS

This fourth chapter focuses on Europeans' attitudes towards international trade in agricultural products. It looks at respondents' views about trade barriers to imports of agricultural products. It then examines their opinions about the impact of trade agreements between the European Union and other countries of the world on EU agriculture and consumers.

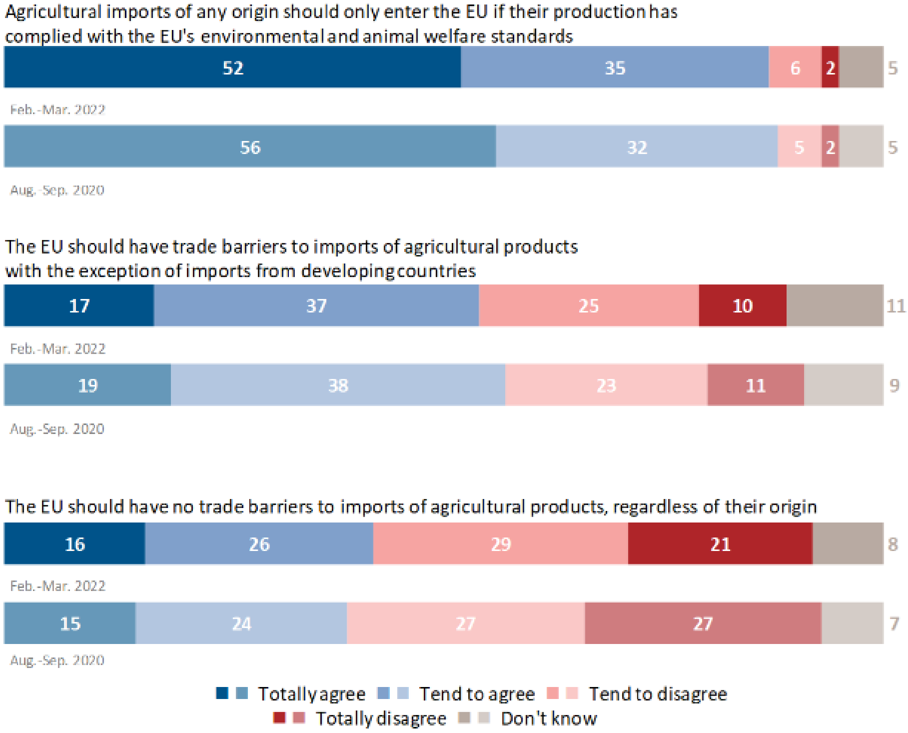
1. The European Union and trade barriers to imports of agricultural products

More than eight in ten Europeans agree that agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards

When asked whether they agree or disagree with three statements about international trade in agricultural products[42], respondents give the following answers:

- Almost nine in ten Europeans (87%, -1 percentage point since 2020) agree that **'agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards'**, with more than half (52%, -4) who 'totally agree'. Conversely, fewer than one in ten (8%, +1) disagree, and 5% (unchanged) answer 'don't know';
- More than half of respondents (54%, -3) agree that **'the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries'**, including nearly one in five (17%, -2) who 'totally agree'. Meanwhile, more than a third (35%, +1) disagree with this statement, and slightly more than one in ten (11%, +2) say they 'don't know';
- More than four in ten Europeans (42%, +3) agree that **'the EU should have no trade barriers to imports of agricultural products, regardless of their origin'**, with more than one in ten (16%, +1) totally agreeing. However, half of respondents (50%, -4) disagree with this idea, and slightly more than one in five (21%, -6) 'totally disagree' with it. Almost one in ten respondents (8%, +1) 'don't know'.

QA16 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
(% - EU)

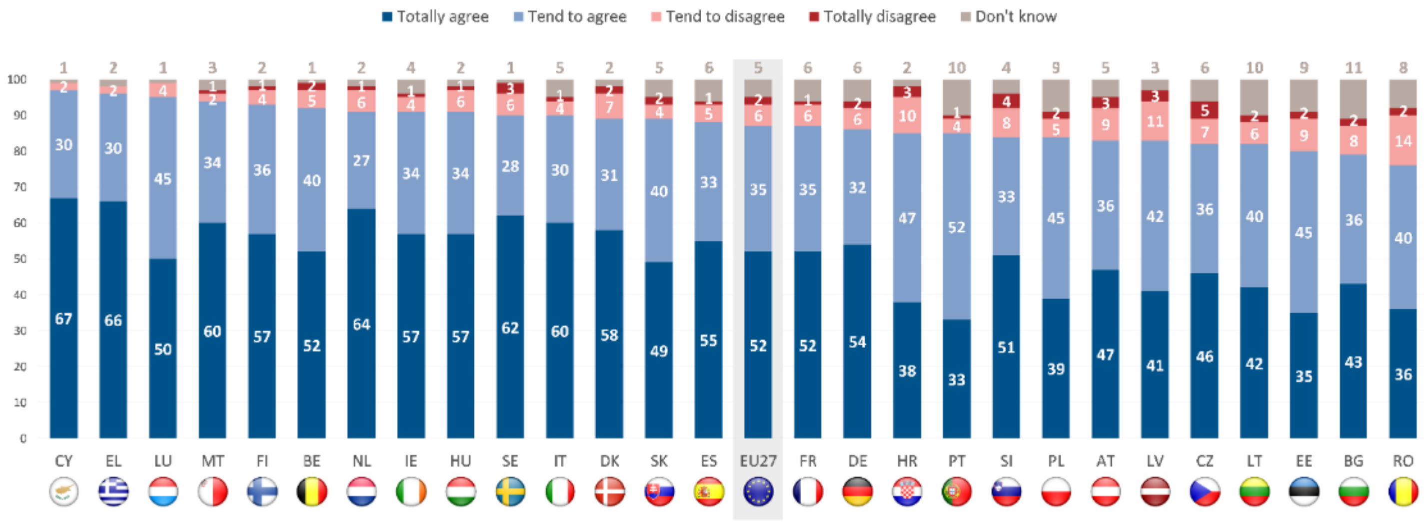


[42] QA16. Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products? 1. The EU should have no trade barriers to imports of agricultural products, regardless of their origin; 2. The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries; 3. Agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards. Totally agree; Tend to agree; Tend to disagree; Totally disagree; Don't know.

In all 27 EU Member States, more than three-quarters of respondents agree that **agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards**. The number is greatest among respondents in Cyprus (97%), Greece (96%), and Luxembourg (95%), and least in Romania (76%), Bulgaria (79%), and Estonia (80%).

At least half of respondents totally agree with this statement in 16 EU Member States, and more than six in ten in Cyprus (67%), Greece (66%), the Netherlands (64%), and Sweden (62%).

QA16.3 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
(% - Agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards)



Since 2020, the proportion of respondents who agree that agricultural imports of any origin should only enter the EU if they comply with the EU's environmental and animal welfare standards has fallen in 16 EU Member States, most notably in Estonia (80%, -8). Conversely, it has risen slightly in seven countries, most notably in Malta (94%, +6). It is unchanged in Slovakia, France, Croatia, and Poland.

QA16.3 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
Agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards (%)

		EU27	MT	IT	LT	FI	CZ	EL	CY	FR	HR	PL	SK	DK	DE	LU	HU	LV	NL	AT	PT	SI	SE	BE	RO	IE	BG	ES	EE
Total 'Agree'	Feb/Mar 2022	87	94	90	82	93	82	96	97	87	85	84	89	89	86	95	91	83	91	83	85	84	90	92	76	91	79	88	80
	Δ Aug/Sep 2020	▼1	▲6	▲5	▲3	▲3	▲2	▲2	▲2	=	=	=	=	▼1	▼1	▼1	▼1	▼2	▼3	▼3	▼3	▼3	▼3	▼4	▼4	▼5	▼6	▼6	▼8
Total 'Disagree'	Feb/Mar 2022	8	3	5	8	5	12	2	2	7	13	7	6	9	8	4	7	14	7	12	5	12	9	7	16	5	10	6	11
	Δ Aug/Sep 2020	▲1	▲2	▼3	=	▼5	▼1	▼2	▼1	=	=	=	=	▲2	=	=	▲1	▲6	▲2	=	▲2	▲3	▲2	▲4	=	▲1	▲4	▲3	▼1
Don't know	Feb/Mar 2022	5	3	5	10	2	6	2	1	6	2	9	5	2	6	1	2	3	2	5	10	4	1	1	8	4	11	6	9

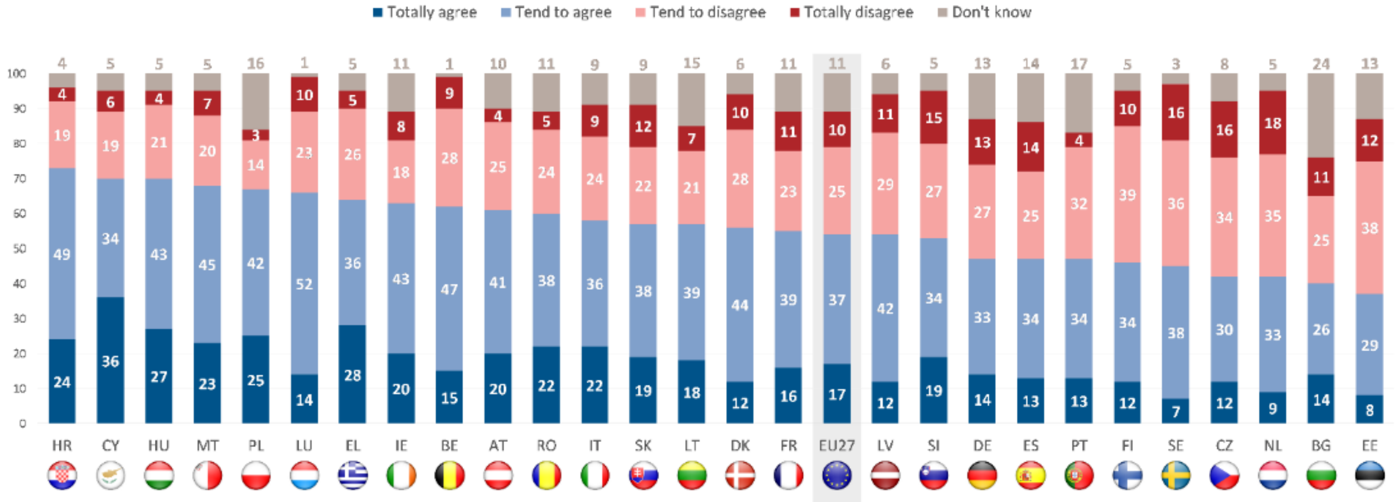
A national analysis reveals that a majority or relative majority of respondents in 22 EU Member States agree that **the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries**. At least seven in ten respondents share this opinion in Croatia (73%), and Hungary and Cyprus (both 70%). At the other end of the scale, the relative majority is narrower in Bulgaria (40% versus 36%), Germany (47% vs 40%), Spain (47% vs 39%), and Portugal (47% vs 36%).

At least one in five respondents totally agree with this idea in ten countries, including over a quarter in Cyprus (36%), Greece (28%), and Hungary (27%).

However, only a minority of respondents agree with this statement in five EU Member States: Estonia (37% versus 50%), the Netherlands (42% vs 53%), Czechia (42% vs 50%), Sweden (45% vs 52%), and Finland (46% vs 49%).

In Bulgaria, around a quarter of respondents say they 'don't know' (24%).

QA16.2 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
(% - The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries)



Since 2020, the share of respondents who agree that the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries has decreased in 17 EU Member States, most dramatically in Finland (46%, -12 percentage points). Meanwhile, it has increased in ten countries, most notably in Lithuania (57%, +9).

QA16.2 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries (%)

		EU27	LT	HR	LV	AT	DK	BE	PL	EE	IE	LU	BG	FR	NL	HU	EL	MT	IT	PT	DE	ES	SI	SK	CZ	SE	CY	RO	FI
Total 'Agree'	Feb/Mar 2022	54	57	73	54	61	56	62	67	37	63	66	40	55	42	70	64	68	58	47	47	47	53	57	42	45	70	60	46
	Δ Aug/Sep 2020	▼3	▲9	▲6	▲5	▲5	▲4	▲3	▲3	▲1	▲1	▲1	▼1	▼1	▼1	▼2	▼3	▼3	▼4	▼4	▼5	▼5	▼5	▼6	▼7	▼7	▼9	▼9	▼12
Total 'Disagree'	Feb/Mar 2022	35	28	23	40	29	38	37	17	50	26	33	36	34	53	25	31	27	33	36	40	39	42	34	50	52	25	29	49
	Δ Aug/Sep 2020	▲1	▼4	▼6	▲3	▼11	▼1	▼3	▼3	▼14	▼12	▼2	▲1	▼1	▼1	▲4	▲4	▲15	▲5	▲1	▲1	▼3	▲5	▲9	▲13	▲5	▲9	▲5	▲7
Don't know	Feb/Mar 2022	11	15	4	6	10	6	1	16	13	11	1	24	11	5	5	5	5	9	17	13	14	5	9	8	3	5	11	5

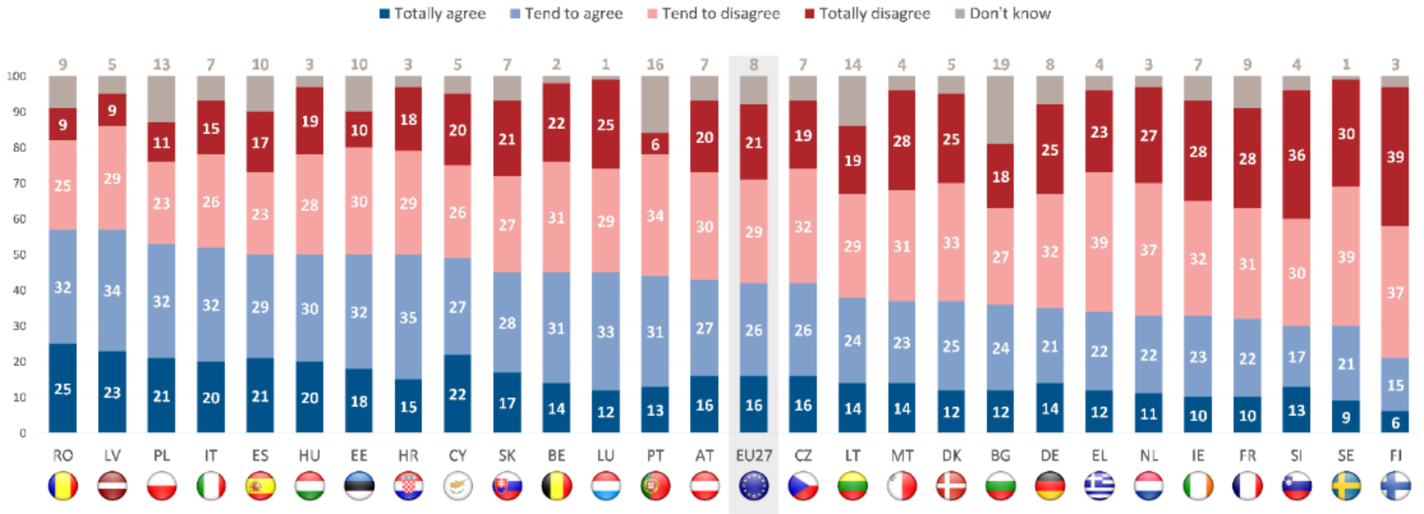
In 17 EU Member States, only a minority of respondents agree that **the EU should have no trade barriers to imports of agricultural products, regardless of their origin**. At most three in ten respondents agree with this statement in Finland (21% versus 76%), Sweden (30% vs 69%), and Slovenia (30% vs 66%), while the level of agreement is higher in Slovakia (45% vs 48%), Belgium (45% vs 53%), and Luxembourg (45% vs 54%).

At least one in five respondents totally disagree with this idea in 16 EU Member States, including at least three in ten in Finland (39%), Slovenia (36%), and Sweden (30%).

However, a majority or relative majority of respondents in ten EU Member States agree that the EU should have no trade barriers to imports of agricultural products at all, with the highest numbers in favour in Romania and Latvia (both 57%), and Poland (53%), and the lowest in Portugal (44% versus 40%) and Cyprus (49% vs 46%).

In seven countries, at least one in five respondents totally agree with this idea, with the highest proportions in Romania (25%), Latvia (23%), and Cyprus (22%).

QA16.1 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
(% - The EU should have no trade barriers to imports of agricultural products, regardless of their origin)



Since 2020, the opinion that the EU should have no trade barriers to imports of agricultural products, regardless of their origin has gained ground in 17 EU Member States, including by double digits in Spain (50%, +13 percentage points), Belgium (45%, +12), Malta (37%, +11), and Latvia (57%, +10). Meanwhile, it has lost ground slightly in six countries, most notably in Romania (57%, -5). It is unchanged in Lithuania, the Netherlands, Slovenia, and Finland.

QA16.1 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
The EU should have no trade barriers to imports of agricultural products, regardless of their origin (%)

		EU27	ES	BE	MT	LV	HU	PT	DE	IE	SK	FR	HR	PL	BG	CY	EE	AT	EL	LT	NL	SI	FI	CZ	IT	DK	SE	LU	RO
Total 'Agree'	Feb/Mar 2022	42	50	45	37	57	50	44	35	33	45	32	50	53	36	49	50	43	34	38	33	30	21	42	52	37	30	45	57
	Δ Aug/Sep 2020	▲3	▲13	▲12	▲11	▲10	▲9	▲8	▲6	▲6	▲6	▲4	▲4	▲4	▲3	▲3	▲2	▲2	▲1	=	=	=	=	▼1	▼1	▼2	▼2	▼3	▼5
Total 'Disagree'	Feb/Mar 2022	50	40	53	59	38	47	40	57	60	48	59	47	34	45	46	40	50	62	48	64	66	76	51	41	58	69	54	34
	Δ Aug/Sep 2020	▼4	▼18	▼13	▼2	▼5	▼8	▼12	▼7	▼13	▼5	▼6	▼5	▼3	▼4	▼2	▼12	▼5	▲1	▲3	▼1	▼1	▼3	▲5	▲2	▲4	▲1	▲2	▲2
Don't know	Feb/Mar 2022	8	10	2	4	5	3	16	8	7	7	9	3	13	19	5	10	7	4	14	3	4	3	7	7	5	1	1	9

The socio-demographic data reveal that:

- Respondents aged 25-39 (45%) are the most likely to agree that **the EU should have no trade barriers to imports of agricultural products, regardless of their origin**, particularly when compared with those aged 55 and over (40%);
- Europeans who continued in education up to age 20 or beyond are more likely than those who left school at age 15 or earlier to agree that **agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards** (90% compared with 85%), but they are less likely than those who left school between ages 16-19 to agree that **the EU should have no trade barriers to imports of agricultural products, regardless of their origin** (37% compared with 46%);
- Managers and self-employed people are the most likely to agree that **agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards** (both 90%, compared with 83% among house persons) and the least likely to say **the EU should have no trade barriers to imports of agricultural products, regardless of their origin** (both 39%, compared with 46% among manual workers);
- Respondents who have difficulties paying their bills from time to time (48%) are the most likely to consider that **the EU should have no trade barriers to imports of agricultural products, regardless of their origin**, particularly when compared with those who never or almost never have such difficulties (40%);

In addition, respondents who believe that agriculture and rural areas are important for the future in the European Union are more likely to agree that **agricultural imports of any origin should only enter the EU if their production has complied with the EU’s environmental and animal welfare standards** (88%, compared with 72% of those who think that agriculture and rural areas are not important). However, they are less likely to agree that **the EU should have no trade barriers to imports of agricultural products, regardless of their origin** (42% compared with 54%).

QA16 Do you agree or disagree with each of the following statements about the European Union and trade barriers to imports of agricultural products?
(% - EU)

	The EU should have no trade barriers to imports of agricultural products, regardless of their origin		The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries		Agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards	
	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'
EU27	42	50	54	35	87	8
Age						
15-24	44	47	52	37	85	9
25-39	46	48	55	37	87	9
40-54	41	52	54	37	88	8
55 +	40	50	53	34	88	5
Education (End of)						
15-	42	44	52	31	85	5
16-19	46	46	54	35	87	7
20+	37	58	54	39	90	7
Still studying	42	49	50	38	86	9
Socio-professional category						
Self-employed	39	55	53	39	90	7
Managers	39	57	54	39	90	7
Other white collars	45	49	55	36	89	7
Manual workers	46	46	56	35	87	8
House persons	43	45	50	34	83	9
Unemployed	45	43	51	36	84	9
Retired	40	50	54	32	86	6
Students	42	49	50	38	86	9
Difficulties paying bills						
Most of the time	45	44	53	34	84	8
From time to time	48	44	57	32	85	9
Almost never/ Never	40	52	53	37	88	7
Subjective urbanisation						
Rural village	43	47	55	32	85	8
Small/ mid size town	43	50	53	38	88	7
Large town	42	51	54	35	89	6
View on agriculture and rural areas in EU						
Important	42	50	54	35	88	7
Not Important	54	41	53	41	72	24

2. EU trade agreements and exchange of agricultural and food products

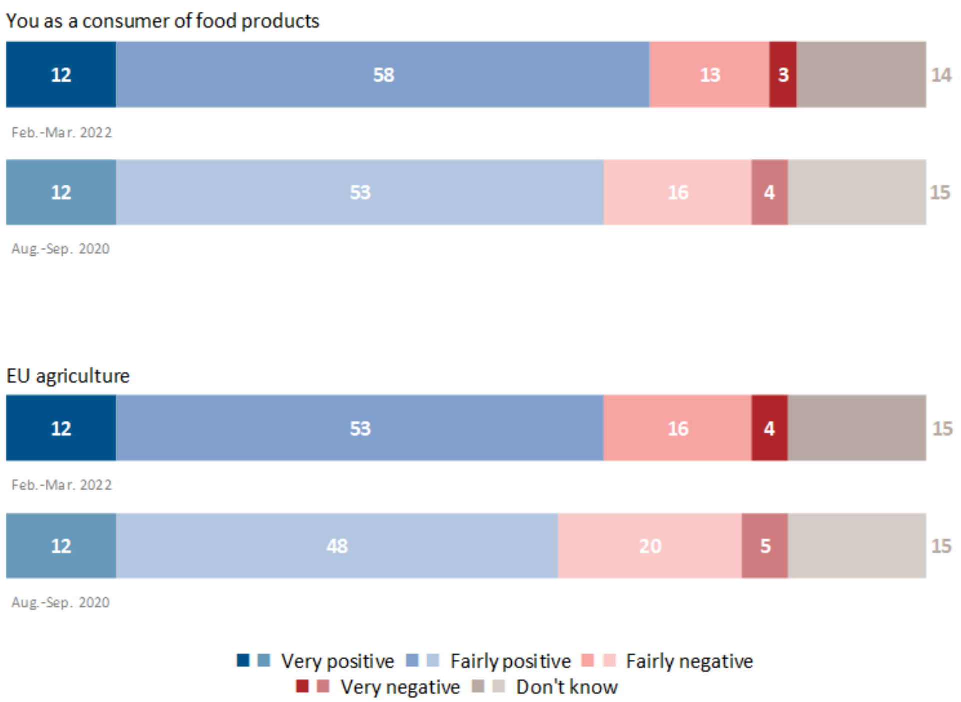
More than six in ten Europeans think that trade agreements between the EU and other countries have been positive for both EU agriculture and themselves as consumers of food products

Respondents were asked whether trade agreements between the European Union and other countries of the world, aiming among other things at facilitating the exchange of agricultural and food products, have been positive or negative for EU agriculture and for themselves as consumers of food products[43]:

- Seven in ten Europeans (70%, +5 percentage points since 2020) respond that these **trade agreements have been positive for them as consumers of food products**, with more than one in ten (12%, unchanged) who say they have been 'very positive'. Conversely, fewer than one in five (16%, -4) consider that these trade agreements have been negative, while more than one in ten (14%, -1) 'don't know';
- Close to two-thirds of respondents (65%, +5) think that these **trade agreements have been positive for EU agriculture**, including more than one in ten (12%, =) who answer 'very positive'. Meanwhile, one in five (20%, -5) believe that these agreements have been negative. More than one in ten (15%, =) answer 'don't know'.

More than six in ten Europeans say that trade agreements between the European Union and other countries of the world have been positive for both EU agriculture and themselves as consumers of food products. Moreover, the opinion that these trade agreements have been positive has gained five percentage points since 2020 for both EU agriculture and consumers of food products.

QA17 Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...?
(% - EU)



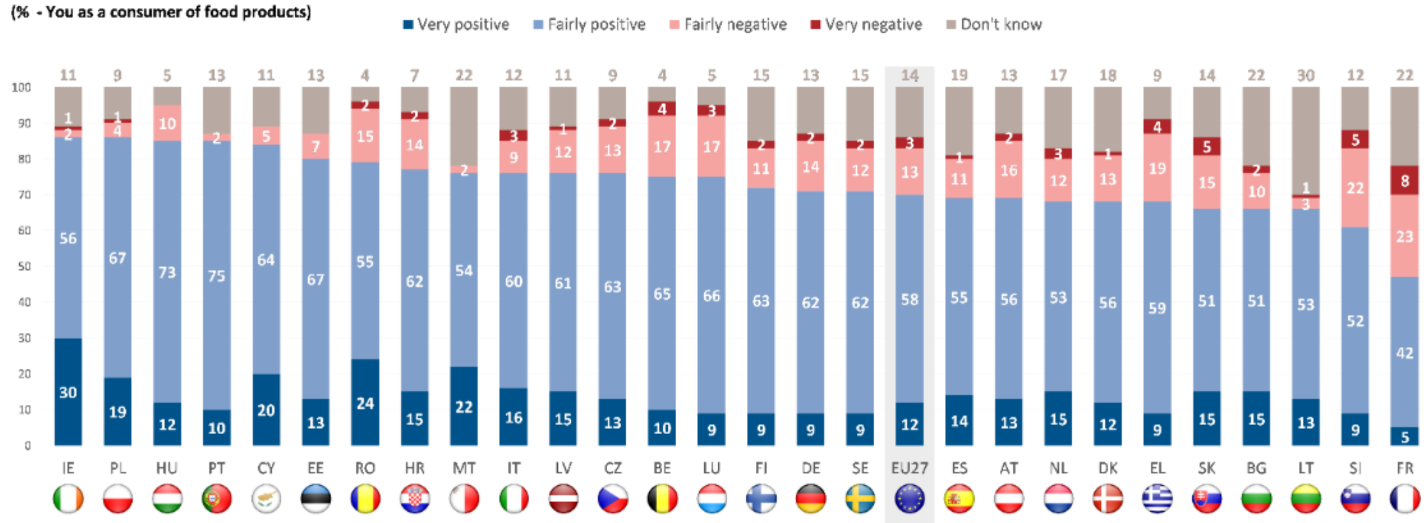
[43] QA17. Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...? 1. EU agriculture; 2. You as a consumer of food products. Very positive; Fairly positive; Fairly negative; Very negative; Don't know.

In all 27 EU Member States, a majority or relative majority of respondents believe that trade agreements between the European Union and other countries of the world have been positive for themselves as consumers of food products. More than eight in ten respondents share this opinion in Poland and Ireland (both 86%), Portugal and Hungary (both 85%), and Cyprus (84%). The majority or relative majority is smaller in France (47% versus 31%), Slovenia (61%), and Bulgaria, Lithuania and Slovakia (all 66%).

At least one in five respondents consider that these trade agreements have been very positive for themselves as consumers of food products in four countries: in Ireland (30%), Romania (24%), Malta (22%), and Cyprus (20%).

However, more than one in five respondents answer 'don't know' in Lithuania (30%), significantly ahead of France, Bulgaria, and Malta (all 22%).

QA17.2 Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...?
(% - You as a consumer of food products)



Since 2020, the proportion of respondents who believe that trade agreements between the EU and other countries of the world have been positive for themselves as consumers of food products has risen in 16 EU Member States, most dramatically in Italy (76%, +13 percentage points), Latvia (76%, +11), and Czechia (76%, +10). Meanwhile, it has fallen in eight countries, including by double digits in Finland (72%, -13), Estonia (80%, -10), and Sweden (71%, -10). It is unchanged in Luxembourg, Lithuania, and Slovenia.

QA17.2 Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...?
You as a consumer of food products (%)

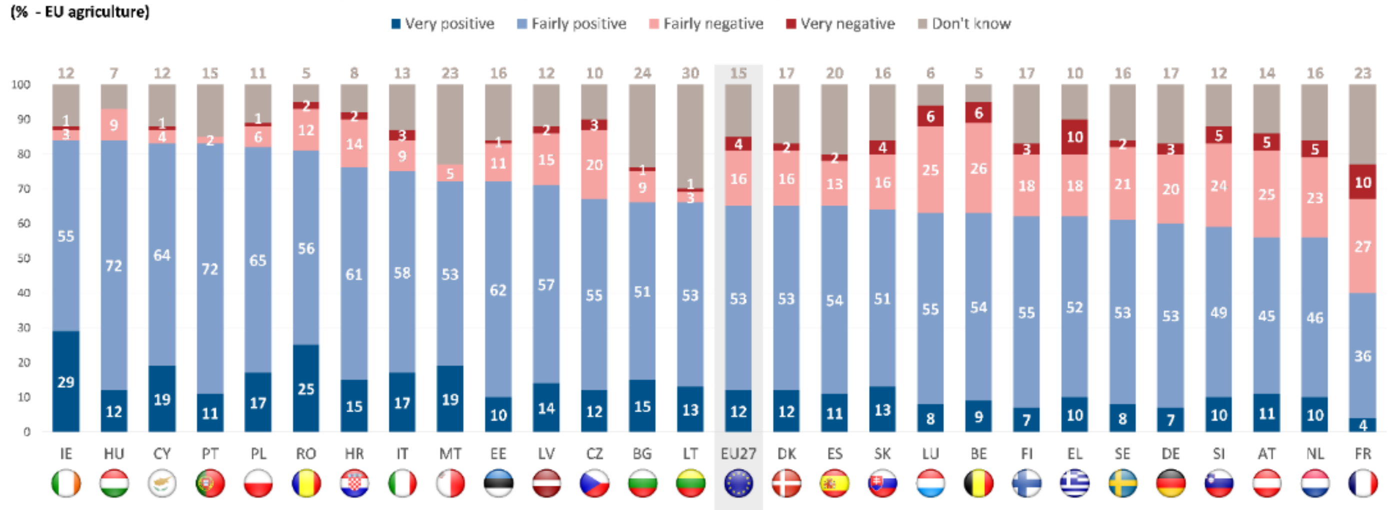
		EU27	IT	LV	CZ	PL	BG	DE	FR	HR	MT	HU	PT	DK	AT	BE	CY	SK	LT	LU	SI	EL	ES	NL	RO	IE	EE	SE	FI
Total 'Positive'	Feb/Mar 2022	70	76	76	76	86	66	71	47	77	76	85	85	68	69	75	84	66	66	75	61	68	69	68	79	86	80	71	72
	Δ Aug/Sep 2020	▲5	▲13	▲11	▲10	▲8	▲7	▲6	▲6	▲6	▲6	▲5	▲5	▲4	▲4	▲2	▲2	▲2	=	=	=	▼1	▼1	▼3	▼3	▼4	▼10	▼10	▼13
Total 'Negative'	Feb/Mar 2022	16	12	13	15	5	12	16	31	16	2	10	2	14	18	21	5	20	4	20	27	23	12	15	17	3	7	14	13
	Δ Aug/Sep 2020	▼4	▼7	▲3	▼2	▼2	▼2	▼2	▼4	▼4	▼3	▼3	▼4	▲5	▼6	▼3	▲1	▼1	▼3	▼4	▲2	▲3	▼9	=	▲3	▼7	▼2	▼2	▼1
Don't know	Feb/Mar 2022	14	12	11	9	9	22	13	22	7	22	5	13	18	13	4	11	14	30	5	12	9	19	17	4	11	13	15	15

A majority or relative majority of respondents in all 27 EU Member States consider that trade agreements between the European Union and other countries of the world have been positive for EU agriculture, with the highest scores in Ireland and Hungary (both 84%), and Portugal and Cyprus (both 83%). At the other end of the scale, fewer than six in ten respondents hold this view in France (40% versus 37%), the Netherlands and Austria (both 56%), and Slovenia (59%).

At least a quarter of respondents say these trade agreements have been very positive for EU agriculture in Ireland (29%) and Romania (25%).

In five EU Member States, at least one in five respondents say they 'don't know': Lithuania (30%), Bulgaria (24%), France and Malta (both 23%), and Spain (20%).

QA17.1 Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...?
(% - EU agriculture)



Since 2020, the share of respondents who believe that trade agreements between the EU and other countries of the world have been positive for EU agriculture has increased in 17 EU Member States, including by double digits in Italy (75%, +14 percentage points) and Latvia (71%, +13). Conversely, it has decreased in ten countries, most strikingly in Estonia (72%, -12), Sweden (61%, -12), and Finland (62%, -10).

QA17.1 Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...?
EU agriculture (%)

		EU27	IT	LV	PT	BG	DE	ES	HU	CZ	DK	HR	MT	PL	LT	CY	SK	FR	AT	IE	RO	BE	EL	SI	NL	LU	FI	EE	SE
Total 'Positive'	Feb/Mar 2022	65	75	71	83	66	60	65	84	67	65	76	72	82	66	83	64	40	56	84	81	63	62	59	56	63	62	72	61
	Δ Aug/Sep 2020	▲5	▲14	▲13	▲9	▲8	▲7	▲7	▲6	▲5	▲5	▲5	▲5	▲5	▲3	▲2	▲2	▲1	▲1	▼1	▼1	▼2	▼2	▼2	▼4	▼5	▼10	▼12	▼12
Total 'Negative'	Feb/Mar 2022	20	12	17	2	10	23	15	9	23	18	16	5	7	4	5	20	37	30	4	14	32	28	29	28	31	21	12	23
	Δ Aug/Sep 2020	▼5	▼8	▲2	▼7	▼3	▼6	▼18	▼5	▲5	▲7	▼5	▼3	=	▼3	=	▼3	▼2	▼4	▼11	=	▼1	▲5	▲5	▲1	=	▼6	▼3	▼1
Don't know	Feb/Mar 2022	15	13	12	15	24	17	20	7	10	17	8	23	11	30	12	16	23	14	12	5	5	10	12	16	6	17	16	16

The socio-demographic data reveal that at least six in ten respondents in all socio-demographic categories believe that trade agreements between the European Union and other countries of the world have been positive for both EU agriculture and for themselves as consumers of food products. However:

- Respondents aged 25-39 are the most likely to say that these trade agreements have been positive for both **EU agriculture** (68%, compared with 63% among respondents aged 55 and over) and **themselves as consumers of food products** (75% compared with 67%);
- Europeans who left school between ages 16-19 are the most likely to believe that these trade agreements have been positive for both **EU agriculture** (68%, compared with 61% among those left school at age 15 or earlier) and **themselves as consumers of food products** (72% compared with 65%);
- Other white-collar workers are the most likely to consider that these trade agreements have been positive for both **EU agriculture** (71%, compared with 61% among house persons and retired people) and **themselves as consumers of food products** (77%, compared with 65% among house persons);
- Respondents who have difficulties paying their bills most of the time are the least likely to say that these trade agreements have been positive for both **EU agriculture** (60%, compared with 68% among those who have such difficulties from time to time) and **themselves as consumers of food products** (64%, compared with 70% among other categories);
- Respondents who live in a large town are more likely than those who live in rural villages to consider that these trade agreements have been positive for **EU agriculture** (69% compared with 63%).

In addition, Europeans who have a positive image of the European Union are far more likely than those who have a negative image of the EU to say these trade agreements have been positive for both **EU agriculture** (72% compared with 46%) and **themselves as consumers of food products** (77% compared with 53%).

Similarly, respondents who think that agriculture and rural areas are important for the future in the European Union are also more likely to believe that these trade agreements have been positive for both **EU agriculture** (65% compared with 56% among those who consider that agriculture and rural areas are not important) and **themselves as consumers of food products** (71% compared with 57%).

Similarly, Europeans who believe that the CAP benefits all European citizens and not only farmers are also more likely to think that the trade agreements have been positive for both **EU agriculture** (71%, compared with 47% among those who disagree that the CAP benefits all Europeans) and **themselves as consumers of food products** (76% compared with 53%).

QA17 Currently, there are a number of trade agreements between the European Union and other countries of the world, with the aim among other things of facilitating the exchange of agricultural and food products. Overall, would you say that these trade agreements have been positive or negative for ...?
(% - EU)

	EU agriculture		You as a consumer of food products	
	Total 'Positive'	Total 'Negative'	Total 'Positive'	Total 'Negative'
EU27	65	20	70	16
Age				
15-24	66	18	73	11
25-39	68	21	75	15
40-54	65	21	71	16
55 +	63	19	67	17
Education (End of)				
15-	61	18	65	16
16-19	68	18	72	16
20+	62	23	69	17
Still studying	66	19	74	11
Socio-professional category				
Self-employed	64	22	69	18
Managers	65	22	71	16
Other white collars	71	17	77	13
Manual workers	66	20	72	16
House persons	61	17	65	15
Unemployed	63	19	67	16
Retired	61	21	66	18
Students	66	19	74	11
Difficulties paying bills				
Most of the time	60	22	64	20
From time to time	68	19	70	17
Almost never/ Never	64	21	70	16
Subjective urbanisation				
Rural village	63	20	69	16
Small/ mid size town	64	21	70	16
Large town	69	18	73	14
Image of the EU				
Total 'Positive'	72	16	77	12
Neutral	63	19	68	16
Total 'Negative'	46	37	53	32
View on agriculture and rural areas in EU				
Important	65	20	71	15
Not Important	56	34	57	33
Common Agricultural Policy (CAP) benefits citizens				
Agree	71	17	76	13
Disagree	47	38	53	33

V. PURCHASING DECISIONS, QUALITY LABELS, AND ORGANIC AGRICULTURE

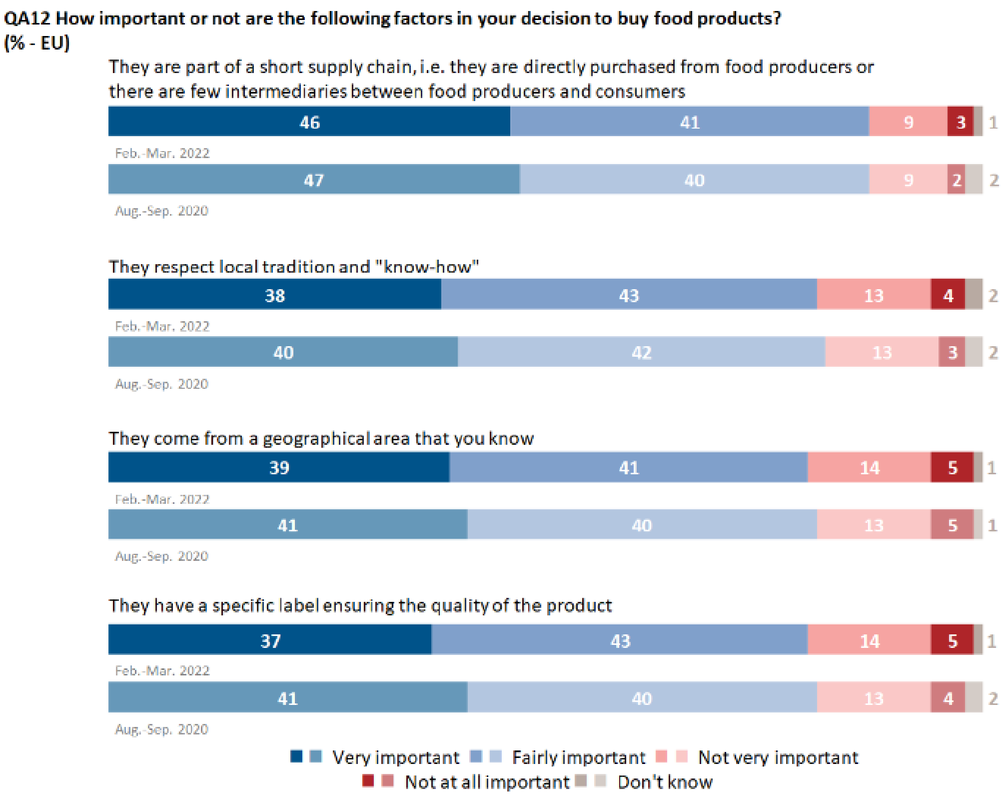
This fifth chapter examines the factors influencing Europeans' food product purchases. It examines their awareness of quality labels and explores their perceptions of food products from organic agriculture. It then assesses whether respondents personally or their children have specific dietary needs.

1. Factors influencing Europeans' food product purchases

More than eight in ten Europeans say the fact that food products are part of a short supply chain is an important factor in their decision to buy them

Respondents were asked whether four different factors are important in their decision to buy food products[44]:

- Almost nine in ten Europeans (87%, unchanged since 2020) say the fact that food products are **'part of a short supply chain, i.e. they are directly purchased from food producers or there are few intermediaries between food producers and consumers'**[45] is an important factor in their decision to buy food products. This score includes nearly half of respondents (46%, -1 percentage point) who say this factor is 'very important'. However, more than one in ten (12%, +1) say it is not important, while 1% (-1) answer 'don't know';
- Slightly more than eight in ten respondents (81%, -1) answer that the fact that food products **'respect local tradition and "know-how"'** is important in their decision to buy food products, including nearly four in ten (38%, -2) answering 'very important'. Conversely, nearly one in five (17%, +1) say this factor is not important, and 2% (=) say they 'don't know';
- Eight in ten respondents (80%, -1) say that the fact that food products **'come from a geographical area that you know'** is important when buying food products, with close to four in ten (39%, -2) say 'very important'. Meanwhile, close to one in five (19%, +1) consider that this factor is not important, while 1% (=) 'don't know';
- The same proportion (80%, -1) respond that having **'a specific label ensuring the quality of the product'** is important in their decision to buy food products, and nearly four in ten (37%, -4) say it is 'very important'. Conversely, close to one in five (19%, +1) consider that this factor is not important. 1% (=) answer 'don't know'.



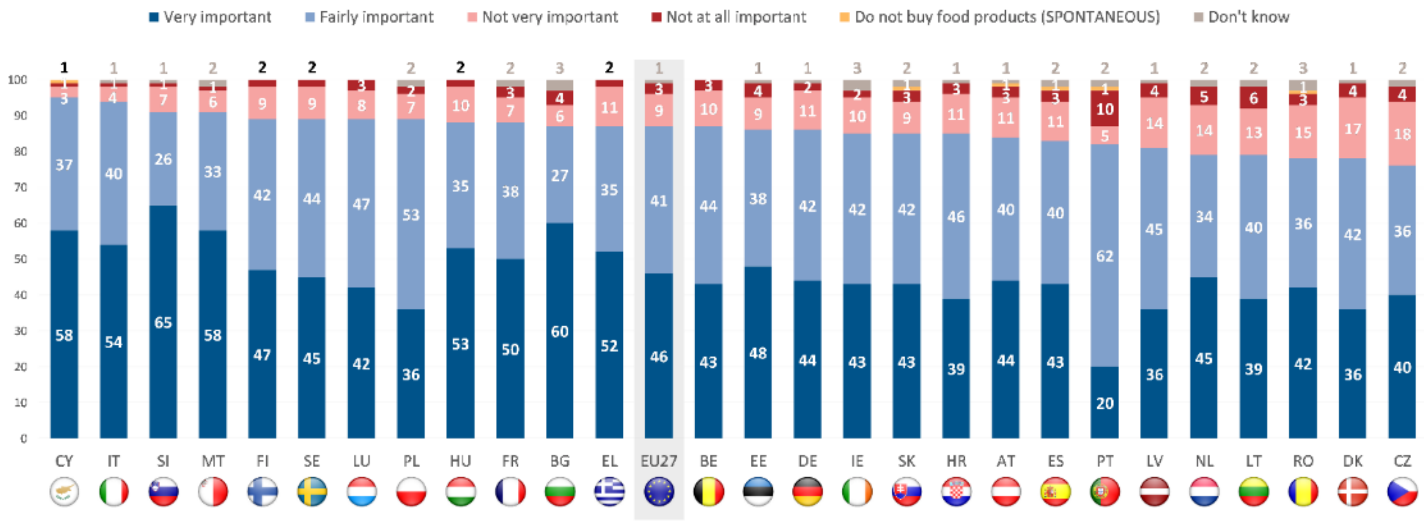
[44] QA12. How important or not are the following factors in your decision to buy food products? 1. They come from a geographical area that you know; 2. They respect local tradition and "know-how"; 3. They have a specific label ensuring the quality of the product; 4. They are part of a short supply chain, i.e. they are directly purchased from food producers or there are few intermediaries between food producers and consumers. Very important; Fairly important; Not very important; Not at all important; You do not buy food products (SPONTANEOUS); Don't know.

[45] This item has been modified since 2020, when it was: 'They are part of a short supply chain, i.e. when distances are short or there are few intermediaries between food producers and consumers.'

A national analysis reveals that, in all 27 EU Member States, more than three-quarters of respondents say **being part of a short supply chain, i.e. being directly purchased from food producers or with few intermediaries between food producers and consumers**, is an important factor in their decision to buy food products. More than nine in ten respondents share this opinion in Cyprus (95%), Italy (94%), Slovenia and Malta (both 91%), and fewer than eight in ten in Czechia (76%), Romania and Denmark (both 78%), and the Netherlands and Lithuania (both 79%).

In eight countries, at least half of respondents say that this factor is very important, with the highest numbers in Slovenia (65%), Bulgaria (60%), and Cyprus and Malta (both 58%).

QA12.4 How important or not are the following factors in your decision to buy food products?
(% - They are part of a short supply chain, i.e. they are directly purchased from food producers or there are few intermediaries between food producers and consumers)



Since 2020, the proportion of respondents who consider that being part of a short supply chain is an important factor in their decision to buy food products has decreased slightly in 13 EU Member States, most notably in Belgium (87%, -5 percentage points) and Spain (83%, -5). Conversely, it has increased in 11 countries, most notably in Cyprus (95%, +9). It is unchanged in Bulgaria, Portugal, and Romania.

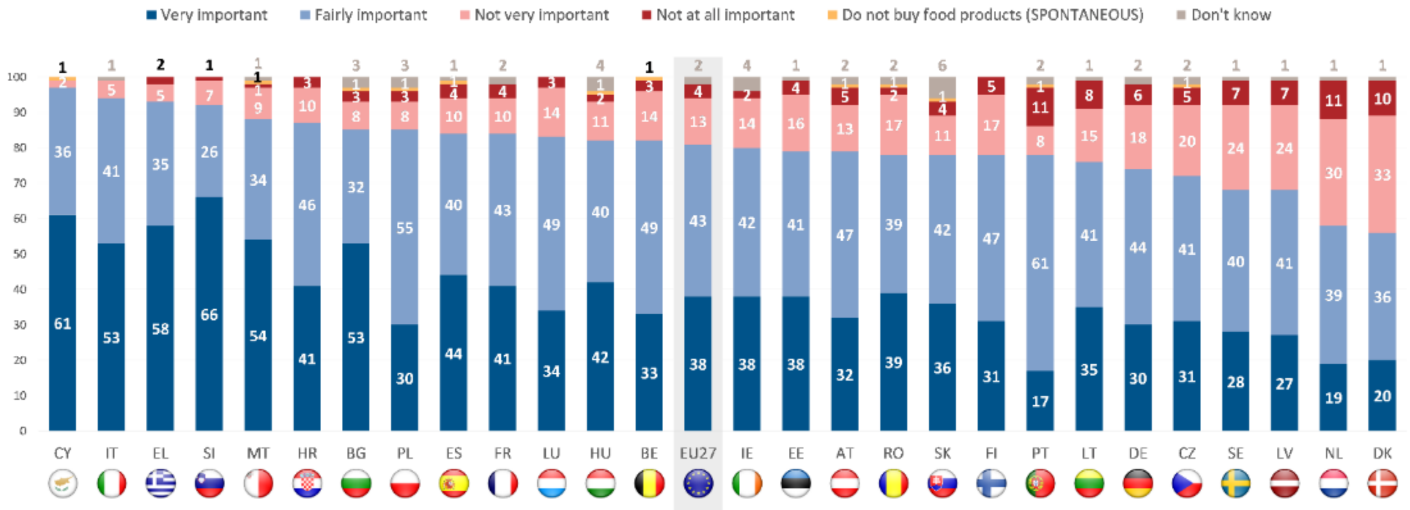
QA12.4 How important or not are the following factors in your decision to buy food products?
They are part of a short supply chain, i.e. they are directly purchased from food producers or there are few intermediaries between food producers and consumers (%)

		EU27	CY	CZ	LV	IT	EL	HR	LT	PL	FI	EE	SI	BG	PT	RO	DK	FR	HU	MT	IE	AT	LU	NL	SK	SE	DE	BE	ES
Total 'Important'	Feb/Mar 2022	87	95	76	81	94	87	85	79	89	89	86	91	87	82	78	78	88	88	91	85	84	89	79	85	89	86	87	83
	Δ Aug/Sep 2020	=	▲9	▲7	▲6	▲4	▲3	▲3	▲3	▲3	▲3	▲1	▲1	=	=	=	▼1	▼1	▼1	▼1	▼2	▼2	▼3	▼3	▼3	▼3	▼4	▼5	▼5
Total 'Not important'	Feb/Mar 2022	12	4	22	18	5	13	14	19	9	11	13	8	10	15	18	21	10	12	7	12	14	11	19	12	11	13	13	14
	Δ Aug/Sep 2020	▲1	▼4	▼3	▼5	▼2	▼1	▼4	▼2	▼2	▼3	▼2	▼1	=	=	▼2	▲1	▲2	▲3	▲3	▼1	▲2	▲3	▲2	▲2	▲3	▲4	▲5	▲4
Don't know	Feb/Mar 2022	1	0	2	1	1	0	1	2	2	0	1	1	3	2	3	1	2	0	2	3	1	0	2	2	0	1	0	2

In all 27 EU Member States, over half of respondents say that the fact that food products **respect local tradition and "know-how"** is an important factor when buying food products. More than nine in ten respondents share this opinion in Cyprus (97%), Italy (94%), Greece (93%), and Slovenia (92%), compared with fewer than seven in ten in Denmark (56%), the Netherlands (58%), and Sweden and Latvia (both 68%).

More than half of respondents say this factor is very important in six countries, with the highest scores in Slovenia (66%), Cyprus (61%), and Greece (58%).

QA12.2 How important or not are the following factors in your decision to buy food products?
(% - They respect local tradition and "know-how")



Since 2020, the share of respondents who consider the respect of local tradition and "know-how" as an important factor in their decision to buy food products has fallen in 17 EU Member States, particularly Portugal (78%, -9 percentage points). Meanwhile, it has risen in nine countries, most notably Czechia (72%, +6). It is unchanged in Greece.

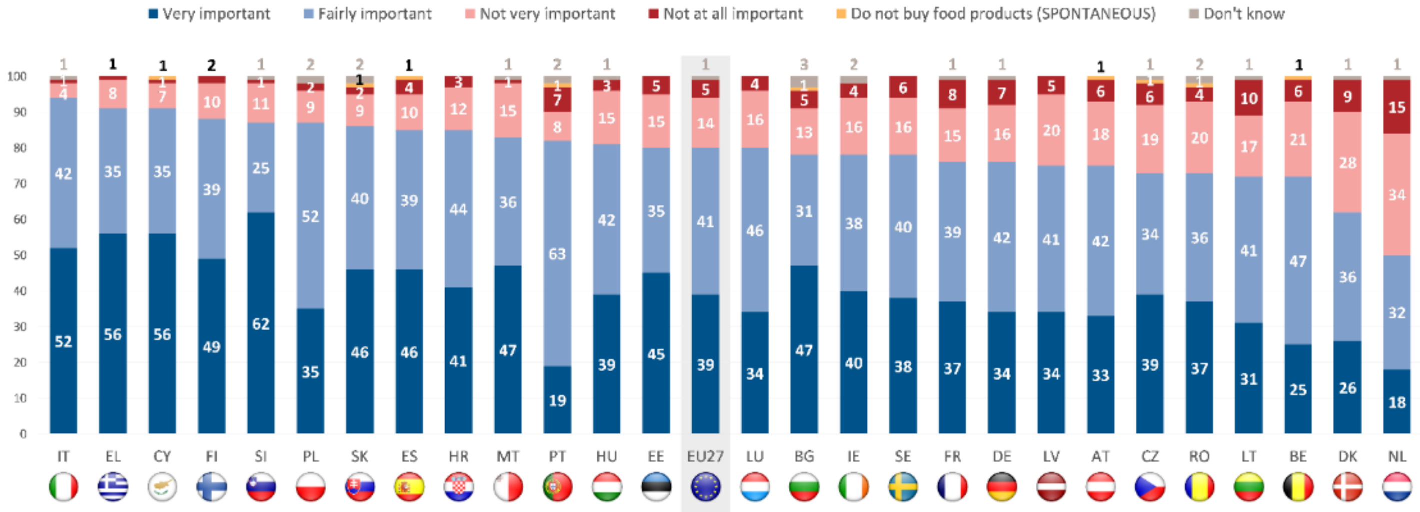
QA12.2 How important or not are the following factors in your decision to buy food products?
They respect local tradition and "know-how" (%)

		EU27	CZ	HR	CY	IT	EE	BG	LV	LT	PL	EL	BE	DE	FR	SI	ES	AT	FI	SE	IE	HU	RO	SK	LU	NL	DK	MT	PT
Total 'Important'	Feb/Mar 2022	81	72	87	97	94	79	85	68	76	85	93	82	74	84	92	84	79	78	68	80	82	78	78	83	58	56	88	78
	Δ Aug/Sep 2020	▼1	▲6	▲5	▲5	▲4	▲2	▲1	▲1	▲1	▲1	=	▼1	▼1	▼1	▼1	▼2	▼2	▼2	▼2	▼3	▼3	▼3	▼3	▼4	▼4	▼5	▼5	▼9
Total 'Not important'	Feb/Mar 2022	17	25	13	2	5	20	11	31	23	11	7	17	24	14	8	14	18	22	31	16	13	19	15	17	41	43	10	19
	Δ Aug/Sep 2020	▲1	▼2	▼5	▼6	▼2	▼3	=	▲1	=	=	=	=	▲2	▲1	▲1	▲1	▲1	▲2	▲1	▼1	▲1	▲1	▲2	▲4	▲5	▲7	▲5	▲7
Don't know	Feb/Mar 2022	2	2	0	0	1	1	3	1	1	3	0	0	2	2	0	1	2	0	1	4	4	2	6	0	1	1	1	2

At least half of respondents in all 27 EU Member States say that the fact that food products **come from a geographical area that they know** is an important factor. More than nine in ten respondents consider that this factor is important in Italy (94%), and Greece and Cyprus (both 91%). This majority is smaller in the Netherlands (50% versus 49%), Denmark (62%), and Belgium and Lithuania (both 72%).

Over half of respondents say that food products coming from a geographical area that they know is a very important factor in four countries: Slovenia (62%), Greece and Cyprus (both 56%), and Italy (52%).

QA12.1 How important or not are the following factors in your decision to buy food products?
(% - They come from a geographical area that you know)



Since 2020, the belief that coming from a geographical area that they know is an important factor in their decision to buy food products has lost ground among respondents in 17 EU Member States, most notably in Romania (73%, -8 percentage points). However, it has gained ground in six countries, particularly in Italy (94%, +5) and Croatia (85%, +5). It is unchanged in France, Czechia, Belgium, and the Netherlands.

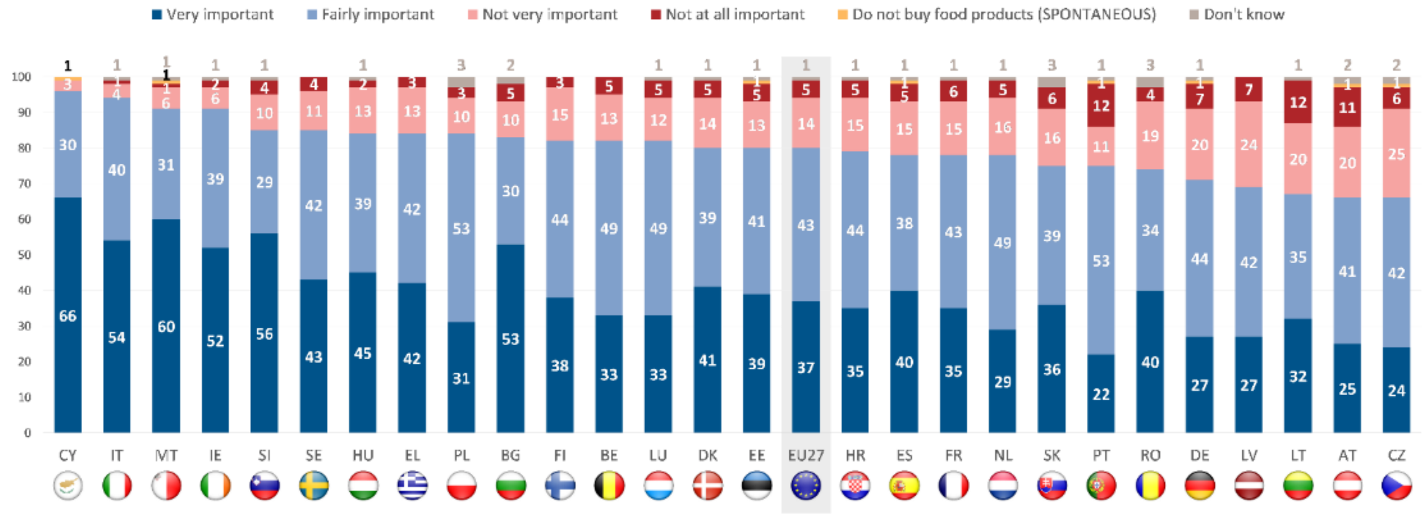
QA12.1 How important or not are the following factors in your decision to buy food products?
They come from a geographical area that you know (%)

		EU27	HR	IT	CY	BG	DK	PL	BE	CZ	FR	NL	EL	LU	SK	FI	DE	AT	SE	EE	ES	LV	LT	IE	SI	HU	PT	MT	RO
Total 'Important'	Feb/Mar 2022	80	85	94	91	78	62	87	72	73	76	50	91	80	86	88	76	75	78	80	85	75	72	78	87	81	82	83	73
	Δ Aug/Sep 2020	▼1	▲5	▲5	▲3	▲1	▲1	▲1	=	=	=	=	▼1	▼1	▼1	▼1	▼2	▼2	▼2	▼3	▼3	▼3	▼3	▼4	▼4	▼5	▼5	▼6	▼8
Total 'Not important'	Feb/Mar 2022	19	15	5	8	18	37	11	27	25	23	49	9	20	11	12	23	24	22	20	14	25	27	20	12	18	15	16	24
	Δ Aug/Sep 2020	▲1	▼5	▼3	▼3	▼1	▼1	▼1	▼1	=	=	▼1	▲1	▲1	▼1	▲1	▲2	▲3	▲2	▲3	▲2	▲4	▲4	▲2	▲4	▲5	▲4	▲7	▲5
Don't know	Feb/Mar 2022	1	0	1	0	3	1	2	0	1	1	1	0	0	2	0	1	0	0	0	0	0	1	2	1	1	2	1	2

In all 27 EU Member States, at least two-thirds of respondents say the fact that food products **have a specific label ensuring the quality of the product** is an important factor in their decision to buy food products. More than nine in ten respondents hold this view in Cyprus (96%), Italy (94%), and Ireland and Malta (both 91%), compared with fewer than seven in ten in Austria and Czechia (both 66%), Lithuania (67%), and Latvia (69%).

In six countries, more than half of respondents answer that this factor is very important when buying food products, with the highest proportions in Cyprus (66%), Malta (60%), and Slovenia (56%).

QA12.3 How important or not are the following factors in your decision to buy food products?
(% - They have a specific label ensuring the quality of the product)



Since 2020, the proportion of respondents who say that having a specific label ensuring the quality of the product is an important factor in their decision to buy food products has decreased in 21 EU Member States, most notably in Spain (78%, -9 percentage points) and Portugal (75%, -9). Meanwhile, it has increased by no more than three percentage points in four countries, most notably in Italy (94%, +3) and Croatia (79%, +3). It is unchanged in Denmark and Czechia.

QA12.3 How important or not are the following factors in your decision to buy food products?
They have a specific label ensuring the quality of the product (%)

		EU27	HR	IT	SI	PL	CZ	DK	DE	EE	CY	MT	FR	SK	SE
Total 'Important'	Feb/Mar 2022	80	79	94	85	84	66	80	71	80	96	91	78	75	85
	Δ Aug/Sep 2020	▼1	▲3	▲3	▲2	▲1	=	=	▼1	▼1	▼1	▼1	▼2	▼2	▼2
Total 'Not important'	Feb/Mar 2022	19	20	5	14	13	31	19	27	18	3	7	21	22	15
	Δ Aug/Sep 2020	▲2	▼3	▼1	▼2	▼1	▲1	▲1	▲1	▼1	=	▲2	▲3	▲1	▲2
Don't know	Feb/Mar 2022	1	1	1	1	3	2	1	1	1	0	1	1	3	0

		IE	EL	LU	HU	NL	BE	BG	AT	RO	FI	LV	LT	ES	PT
Total 'Important'	Feb/Mar 2022	91	84	82	84	78	82	83	66	74	82	69	67	78	75
	Δ Aug/Sep 2020	▼3	▼3	▼3	▼3	▼3	▼4	▼5	▼5	▼5	▼5	▼6	▼8	▼9	▼9
Total 'Not important'	Feb/Mar 2022	8	16	17	15	21	18	15	31	23	18	31	32	20	23
	Δ Aug/Sep 2020	▲2	▲4	▲2	▲3	▲2	▲4	▲5	▲4	▲3	▲5	▲7	▲9	▲8	▲9
Don't know	Feb/Mar 2022	1	0	1	1	1	0	2	2	3	0	0	1	1	1

The socio-demographic data reveal that:

- Respondents aged 55 and over are more likely than those aged 15-24 to say that these four factors are important in their decision to buy food products, particularly when they **come from a geographical area that they know** (83% compared with 71%) **and respect local tradition and "know-how"** (83% compared with 74%);
- Europeans who left school at age 15 or earlier are more likely than those who continued in education up to age 20 or beyond to say that **coming from a geographical area that they know** (85% compared with 78%) and **respecting local tradition and "know-how"** (86% compared with 80%) are important factors in their decision to buy food products;
- Self-employed people are the most likely to answer that **respecting local tradition and "know-how"** (86%, compared with 74% among students), **coming from a geographical area that they know** (83% compared with 72%) and **being part of a short supply chain** (91%, compared with 82% among both unemployed people and students) are important factors when buying food products;
- Respondents who never or almost never have difficulties paying their bills are the most likely to consider **being part of a short supply chain** as an important factor in their decision to buy food products (87%, compared with 82% among those who have such difficulties most of the time);

In addition, respondents who think that agriculture and rural areas are important for the future in the European Union are the most likely to say that these four factors are important in their decision to buy food products, particularly when it comes to **being part of a short supply chain** (87%, compared with 64% among those who consider that agriculture and rural areas are not important).

Similarly, Europeans who agree that the CAP benefits all European citizens and not only farmers are more likely than those who disagree with this statement to say that these four factors are important when buying food products, most notably when they **have a specific label ensuring the quality of the product** (83% compared with 71%).

QA12 How important or not are the following factors in your decision to buy food products?
(% - EU)

	They come from a geographical area that you know		They respect local tradition and "know-how"		They have a specific label ensuring the quality of the product		They are part of a short supply chain, i.e. they are directly purchased from food producers or there are few intermediaries between food producers and consumers	
	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'
EU27	80	19	81	17	80	19	87	12
Age								
15-24	71	28	74	24	77	21	80	18
25-39	76	23	78	21	79	20	85	14
40-54	82	17	83	16	81	18	88	10
55 +	83	15	83	14	80	18	88	10
Education (End of)								
15-	85	13	86	12	78	19	86	11
16-19	81	18	82	16	80	19	87	12
20+	78	22	80	19	80	19	88	11
Still studying	72	26	74	24	81	17	82	17
Socio-professional category								
Self-employed	83	16	86	13	81	19	91	9
Managers	80	20	80	19	82	18	89	11
Other white collars	81	18	81	18	83	16	89	10
Manual workers	79	20	80	18	77	21	85	13
House persons	82	16	81	16	77	21	83	13
Unemployed	74	25	77	21	72	26	82	16
Retired	82	16	84	13	79	18	88	10
Students	72	26	74	24	81	17	82	17
Difficulties paying bills								
Most of the time	77	22	83	16	76	23	82	15
From time to time	81	18	82	16	79	18	85	13
Almost never/ Never	80	19	80	17	80	19	87	11
View on agriculture and rural areas in EU								
Important	81	18	82	16	80	19	87	11
Not Important	59	40	60	37	64	33	64	34
Common Agricultural Policy (CAP) benefits citizens								
Agree	81	18	83	15	83	16	88	11
Disagree	73	26	75	23	71	27	82	17

2. Awareness of quality labels

Slightly more than six in ten Europeans are aware of the organic farming logo, largely ahead of any other logo

Respondents were shown five logos and asked which of them they are aware of[46]:

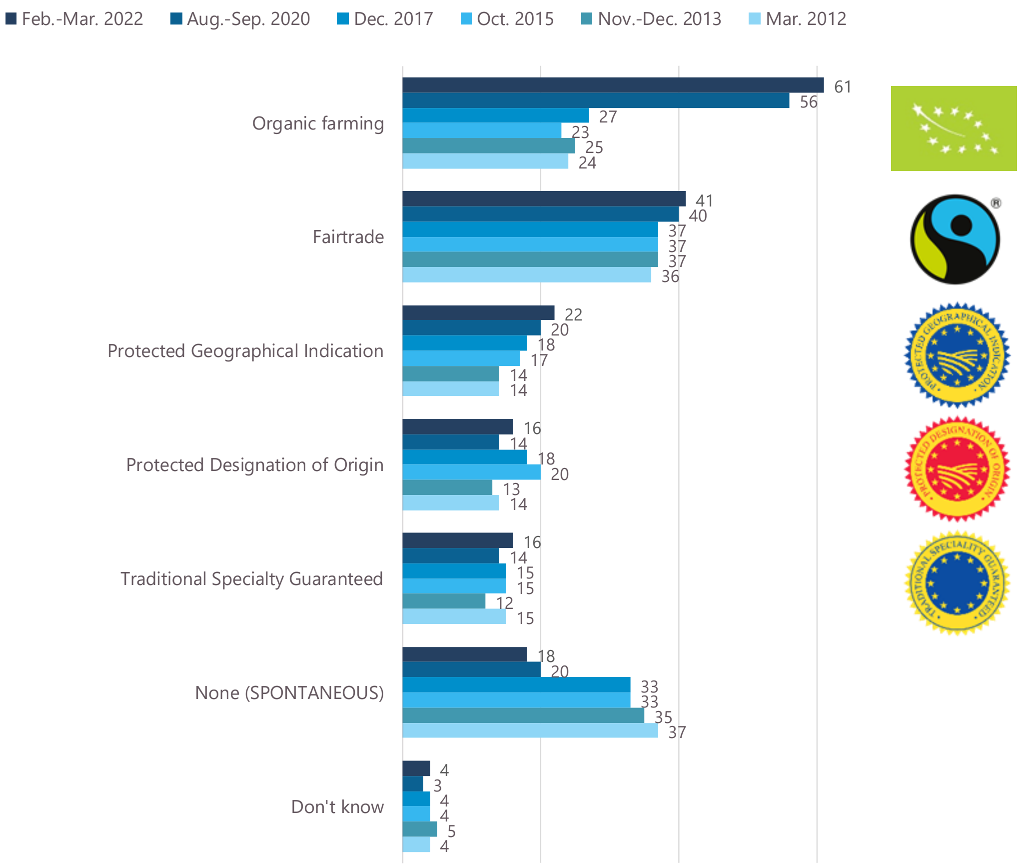
- More than six in ten Europeans (61%, +5 percentage points since 2020) say they are aware of the **'organic farming'** logo;
- Slightly more than four in ten respondents (41%, +1) know the **'Fairtrade'** logo[47];
- More than one in five Europeans (22%, +2) are aware of the **'protected geographical indication'** logo;
- Almost one in five respondents say they know the **'protected designation of origin'** (16%, +2) and the **'traditional specialty guaranteed'** logos (16%, +2).

Close to one in five Europeans (18%, -2 percentage points since 2020) say they are not aware of any of these logos, while just 4% (+1) answer 'don't know'. Consequently, over three-quarters of Europeans (78%, +1) are aware of at least one of the five logos.

Awareness of each logo has gained ground since 2020, most notably awareness of the 'organic farming' logo (+5 percentage points).

A longer-term trend analysis reveals that awareness of the five logos has risen since 2012, most strikingly for 'organic farming' (+37 percentage points, up from 24% in second position to 61% in first place) and, to a lesser extent, 'protected geographical indication' (+8 points, up from 14% to 22%) and 'Fairtrade' (+5, up from 36% to 41%). Conversely, the share of respondents who are not aware of any of these logos has fallen (-19, down from 37% to 18%).

QA13 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



[46] QA13. Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE) (Five logos shown) Organic farming; Fairtrade; Protected designation of origin; Protected geographical indication; Traditional specialty guaranteed; None (SPONTANEOUS); Don't know.
[47] The 'Fairtrade' logo is the only logo tested which is not an EU logo.

A national analysis reveals that, in 17 EU Member States, the **organic farming** logo comes first in the hierarchy of logos which respondents are aware of. At least seven in ten respondents within these countries are aware of this logo in Lithuania (75%), Latvia (74%), and Poland (70%). Moreover, the organic farming logo also achieves higher awareness rates in Luxembourg (81%), Denmark (72%), and Germany and Sweden (both 71%). Conversely, the awareness of the organic farming logo is lowest among respondents in Portugal (31%), Ireland (40%), and Spain (44%, still in first place).

In nine EU Member States, the **Fairtrade** logo is the one that respondents are most aware of: Luxembourg (93%), the Netherlands (92%), Sweden (89%), Ireland (85%), Denmark (84%), Austria and Belgium (both 77%), Germany (76%), and Finland (70%). In the 18 other countries, fewer than half of respondents say they are aware of the Fairtrade logo, with the lowest recognition rates in Spain (9%), and Bulgaria and Latvia (both 13%).

None of the three other logos heads the list of logos which respondents are most aware of in any of the 27 EU Member States. Moreover, at most a third of respondents say they are aware of these three logos in each country. However:

- In 12 EU Member States, at least one in five respondents know the **protected geographical indication** logo, including more than three in ten in France and Italy (both 33%), and Spain (31%). Conversely, fewer than one in ten respondents are aware of this logo in Denmark and Latvia (both 7%), Finland (8%), and the Netherlands and Sweden (both 9%);
- More than one in five respondents are aware of the **protected designation of origin** logo in Italy (30%), Slovakia (28%), France (27%), and Austria (22%). Fewer than one in ten recognize this logo in 11 countries, with the lowest awareness rates in the Netherlands and Latvia (both 3%), and Denmark (4%);
- More than one in five respondents know the **traditional specialty guaranteed** logo in Italy (29%), Slovakia (26%), Czechia (23%), and Austria (22%). Meanwhile, fewer than one in ten respondents are aware of this logo in eight countries, with the lowest recognition rates in Denmark and Latvia (both 4%), and the Netherlands and Sweden (both 5%).

Portugal (46%) is the only EU Member State where a relative majority of respondents *spontaneously* answer that they do not know any of these five logos. At least three in ten respondents say the same in Greece (36%), Bulgaria (34%), Cyprus (32%), Spain and Romania (both 31%), and Hungary (30%).

QA13 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Organic farming	**61**	54	**48**	**56**	72	71	**66**	40	**48**	**44**	**68**	**52**	**58**	**48**	**74**	**75**	81	**50**	**45**	64	61	**70**	**31**	**47**	**69**	**58**	69	71
Fairtrade	41	**77**	*13*	41	**84**	**76**	37	**85**	18	*9*	35	26	*20*	17	13	15	**93**	28	40	**92**	**77**	17	25	16	32	45	**70**	**89**
Protected Geographical Indication	22	13	22	27	7	16	12	13	18	31	33	20	33	13	7	21	20	*15*	11	9	25	16	22	14	25	27	8	9
Protected Designation of Origin	*16*	*11*	15	*17*	*4*	*9*	*7*	*8*	*12*	12	27	*16*	30	*8*	*3*	*8*	16	*15*	8	*3*	*22*	*10*	*10*	*11*	17	28	*7*	6
Traditional Specialty Guaranteed	*16*	*11*	19	23	*4*	11	9	12	15	15	*17*	17	29	10	4	13	*9*	*15*	*7*	5	*22*	14	14	13	*15*	*26*	*7*	*5*
None (SPONTANEOUS)	18	9	34	16	9	*9*	17	7	36	31	16	19	19	32	17	13	1	30	19	4	8	16	46	31	17	17	13	*5*
Don't know	4	1	6	3	1	3	8	1	3	4	1	7	5	*8*	4	5	0	2	13	0	3	6	3	7	3	7	2	1

Highest percentage per country
Lowest percentage per country
Highest percentage per item
Lowest percentage per item

Since 2020, awareness of the five logos has recorded changes at national level of more than five percentage points:

- The proportion of respondents who are aware of the **organic farming** logo has increased in 19 EU Member States, most dramatically in Malta (45%, +15 percentage points), Italy (58%, +10), and Hungary (50%, +10). Conversely, it has decreased in six countries, most notably in Portugal (31%, -9). It remains unchanged in Poland and Ireland;
- The share of respondents who know the **Fairtrade** logo has risen in 12 EU Member States, including by double digits in Czechia (41%, +18), Slovakia (45%, +16), and Hungary (28%, +11). Meanwhile, it has fallen in 12 countries, most notably in Estonia (37%, -11). It is unchanged in France, Poland, and Cyprus;
- Awareness of the **protected geographical indication** logo has gained ground in 19 EU Member States, most notably in Slovenia (25%, +9). However, it has lost ground slightly in six countries, with the highest decrease recorded in Portugal (22%, -5). It is unchanged in Spain and Croatia;
- The share of respondents who are aware of the **protected designation of origin** logo has risen in 18 EU Member States, notably in Italy (30%, +9). Meanwhile, it has fallen in four countries, including by double digits in Portugal (10%, -14). It is unchanged in five countries;
- Awareness of the **traditional specialty guaranteed** logo has gained ground in 16 EU Member States, most notably in Italy (29%, +9). Conversely, it has lost ground in eight countries, most dramatically in Portugal (14%, -13). It is unchanged in Bulgaria, Belgium, and the Netherlands.

At the same time, the proportion of respondents *spontaneously* saying that they are not aware of any of these five logos has decreased in 15 EU Member States, most strikingly in Malta (19%, -17 percentage points since 2020). However, the figure has increased slightly in nine countries, most notably in Ireland (7%, +5). It is unchanged in Slovenia, Germany, and the Netherlands.

QA13 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(%)

		EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Organic farming	Feb/Mar 2022	61	54	48	56	72	71	66	40	48	44	68	52	58	48	74	75	81	50	45	64	61	70	31	47	69	58	69	71
	Δ Aug/Sep 2020	▲5	▼6	▲1	▲4	▲1	▲9	▼2	=	▲7	▼1	▲4	▲5	▲10	▲9	▲1	▲2	▲7	▲10	▲15	▲1	▲2	=	▼9	▼4	▼3	▲7	▲4	▲2
Fairtrade	Feb/Mar 2022	41	77	13	41	84	76	37	85	18	9	35	26	20	17	13	15	93	28	40	92	77	17	25	16	32	45	70	89
	Δ Aug/Sep 2020	▲1	▼4	▼1	▲18	▲3	▼3	▼11	▼5	▲5	▼3	=	▲3	▲6	=	▼2	▲6	▼1	▲11	▲6	▼1	▼1	=	▲2	▲3	▲7	▲16	▼9	▼4
Protected Geographical Indication	Feb/Mar 2022	22	13	22	27	7	16	12	13	18	31	33	20	33	13	7	21	20	15	11	9	25	16	22	14	25	27	8	9
	Δ Aug/Sep 2020	▲2	▼3	▼2	▲3	▼2	▲3	▲2	▲3	▲7	=	▲4	=	▲6	▲4	▼1	▲2	▲2	▲1	▼1	▲1	▲7	▲5	▼5	▲5	▲9	▲1	▲2	▲1
Protected Designation of Origin	Feb/Mar 2022	16	11	15	17	4	9	7	8	12	12	27	16	30	8	3	8	16	15	8	3	22	10	10	11	17	28	7	6
	Δ Aug/Sep 2020	▲2	▲2	▼3	=	=	▲1	▲4	=	▲6	▼5	▲4	▲2	▲9	▲3	=	▲3	▲2	▲4	▼3	=	▲6	▲2	▼14	▲4	▲5	▲4	▲2	▲2
Traditional Specialty Guaranteed	Feb/Mar 2022	16	11	19	23	4	11	9	12	15	15	17	17	29	10	4	13	9	15	7	5	22	14	14	13	15	26	7	5
	Δ Aug/Sep 2020	▲2	=	=	▲5	▼2	▲3	▲2	▲3	▲4	▼5	▲1	▲2	▲9	▲3	▼4	▲5	▼2	▲3	▼7	=	▲5	▲2	▼13	▲2	▲3	▼2	▲1	▼1
None (SPONTANEOUS)	Feb/Mar 2022	18	9	34	16	9	9	17	7	36	31	16	19	19	32	17	13	1	30	19	4	8	16	46	31	17	17	13	5
	Δ Aug/Sep 2020	▼2	▲1	▼2	▼5	▲1	=	▲2	▲5	▼8	▲3	▼3	▼6	▼8	▼2	▲1	▼5	▼1	▼8	▼17	=	▼2	▼3	▲2	▼1	=	▼5	▲3	▲1
Don't know	Feb/Mar 2022	4	1	6	3	1	3	8	1	3	4	1	7	5	8	4	5	0	2	13	0	3	6	3	7	3	7	2	1

The socio-demographic data reveal that at least four in ten respondents in all socio-demographic categories are aware of the **organic farming** logo. However:

- Women (63%) are more likely than men (58%) to be aware of the **organic farming** logo;
- Respondents aged 55 and over are the least likely to be aware of any logo, most notably of the **organic farming** (54%, compared with 64% among those aged 15-24) and **Fairtrade** (35% compared with 45%) logos;
- Europeans who left school at age 15 or earlier are the least likely to know any of these five logos, for instance the **Fairtrade** (20%, compared with 54% among those who continued in education up to age 20 or beyond) and **organic farming** (40% compared with 69%) logos;
- Managers are the most likely to be aware of the **organic farming** (71%), **Fairtrade** (61%) and **protected geographical indication** (27%) logos, while at least a quarter of house persons (27%) and retired people (25%) say *spontaneously* that they are not aware of any of the five logos;
- Respondents who never or almost never have difficulties paying their bills are the most likely to be aware of the **organic farming** (64%) and **Fairtrade** (46%) logos, while those who have such difficulties most of the time are slightly more likely to know the **protected geographical indication** logo (23%);
- Respondents who live in a large town are more likely than those who live in a rural village to answer that they are aware of each logo, particularly the **organic farming** logo (65% compared with 55%).

Moreover, Europeans who think that agriculture and rural areas are important for the future in the European Union are the most likely to be aware of the five logos, most notably the **organic farming** logo (61%, compared with 47% among respondents who consider that agriculture and rural areas are not important).

QA13 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)

	Organic farming	Fairtrade	Protected Designation of Origin	Protected Geographical Indication	Traditional Specialty Guaranteed	None (SPONTANEOUS)	Don't know
EU27	61	41	16	22	16	18	4
Gender							
Man	58	41	16	22	17	19	4
Woman	63	42	15	23	15	17	4
Age							
15-24	64	45	16	24	16	18	2
25-39	66	49	19	28	19	11	3
40-54	65	44	17	25	18	13	3
55 +	54	35	13	18	13	24	5
Education (End of)							
15-	40	20	10	16	11	38	6
16-19	60	38	16	22	17	17	4
20+	69	54	18	25	16	10	2
Still studying	68	50	16	26	18	15	3
Socio-professional category							
Self-employed	67	47	24	25	22	13	3
Managers	71	61	20	27	18	7	2
Other white collars	66	47	18	25	17	11	3
Manual workers	59	37	16	24	18	18	3
House persons	54	27	16	23	16	27	5
Unemployed	57	33	13	25	14	19	5
Retired	52	34	10	15	10	25	5
Students	68	50	16	26	18	15	3
Difficulties paying bills							
Most of the time	50	33	16	25	17	25	5
From time to time	55	31	18	23	16	22	5
Almost never/ Never	64	46	15	22	16	16	3
Subjective urbanisation							
Rural village	55	39	12	18	12	21	4
Small/ mid size town	62	41	18	24	17	17	3
Large town	65	45	17	24	17	15	3
View on agriculture and rural areas in EU							
Important	61	42	16	22	16	18	4
Not Important	47	35	14	21	12	21	4

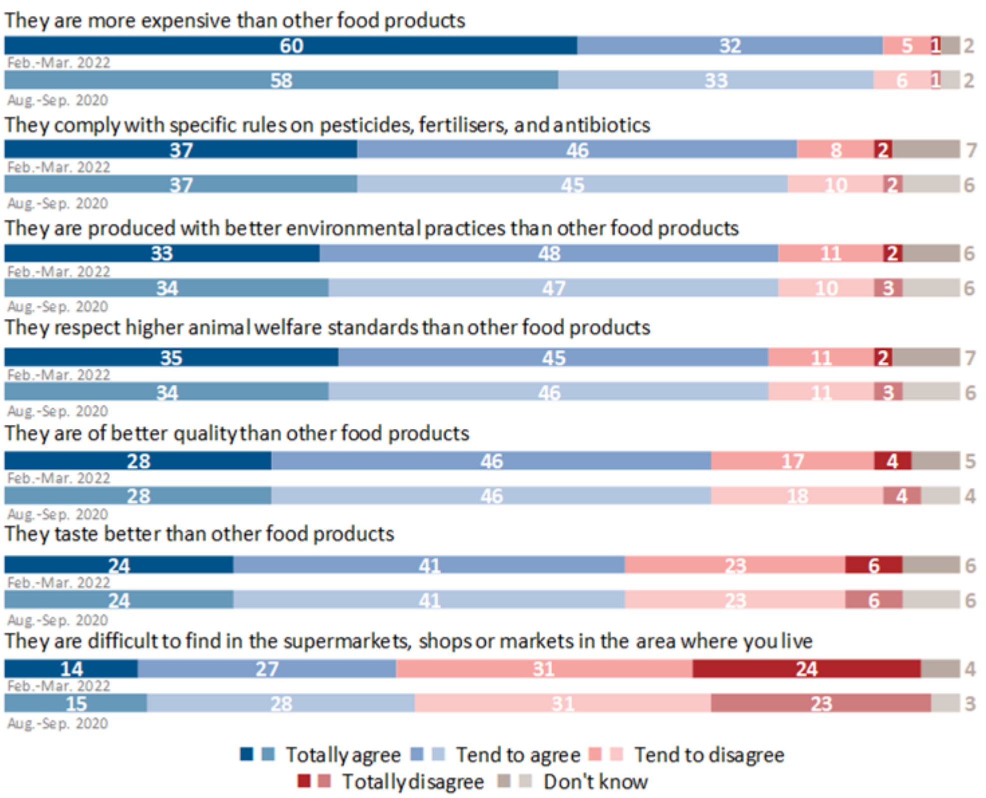
3. Perceptions of organic agriculture

More than nine in ten Europeans agree that food products coming from "organic" agriculture are more expensive than other food products

Respondents were asked whether they agree or disagree with seven statements related to food products from "organic" agriculture[48]:

- More than nine in ten Europeans (92%, +1 percentage point since 2020, with 60%, +2, 'totally agree') consider that food products coming from "organic" agriculture **'are more expensive than other food products'**;
- At least eight in ten respondents agree with three statements: they think that organic food products **'comply with specific rules on pesticides, fertilisers, and antibiotics'** (83%, +1, including 37%, unchanged, 'totally agree'), **'are produced with better environmental practices than other food products'** (81%, =, with 33%, -1, 'totally agree' and 47% 'tend to agree') and **'respect higher animal welfare standards than other food products'** (80%, =, including 35%, +1, 'totally agree');
- Close to three-quarters of Europeans believe that these products **'are of better quality than other food products'** (74%, =, with 28%, =, 'totally agree');
- Nearly two-thirds of respondents (65%, =, including 24%, =, 'totally agree') think that organic food products **'taste better than other food products'**;
- However, slightly more than four in ten Europeans (41%, -2, with 14%, -1, 'totally agree') say **'they are difficult to find in the supermarkets, shops or markets in the area where you live'**, while a majority of respondents (55%, +1, including 24%, +1, who 'totally disagree') disagree with this statement.

QA14. Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - EU)

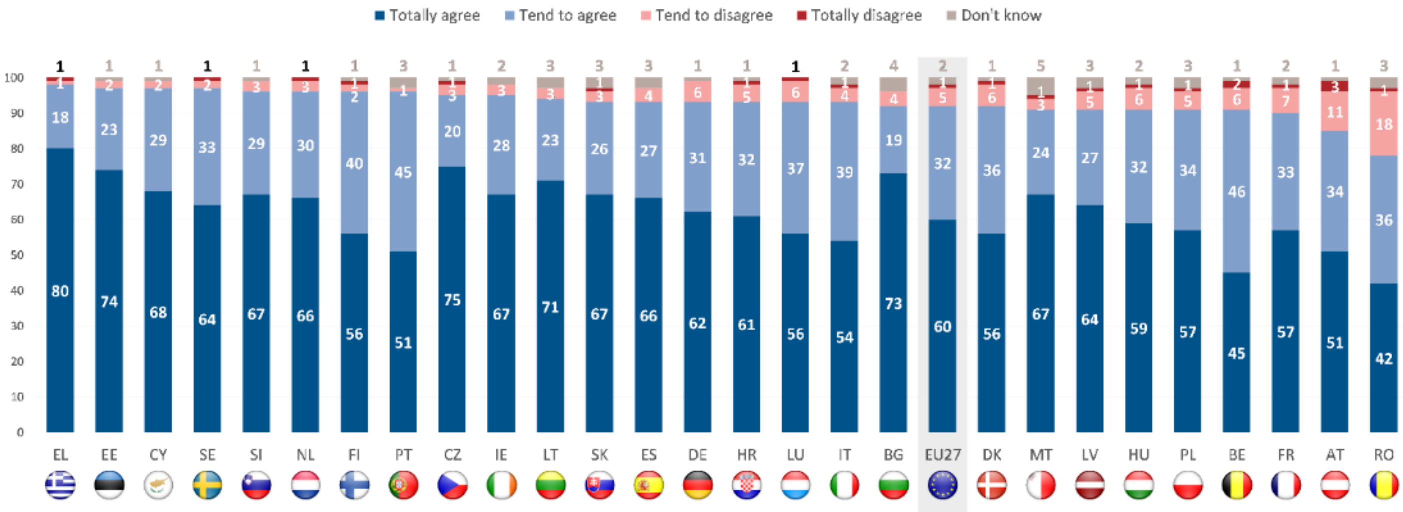


[48] QA14. Do you agree or not with the following statements related to food products coming from "organic" agriculture...? 1. They are of better quality than other food products; 2. They are more expensive than other food products; 3. They taste better than other food products; 4. They are produced with better environmental practices than other food products; 5. They comply with specific rules on pesticides, fertilisers, and antibiotics; 6. They respect higher animal welfare standards than other food products; 7. They are difficult to find in the supermarkets, shops or markets in the area where you live

A national analysis reveals that more than three-quarters of respondents consider that organic food products **are more expensive than other food products** in all 27 EU Member States, with the highest proportions among respondents in Greece (98%), and Sweden, Estonia and Cyprus (all 97%), and the lowest in Romania (78%), Austria (85%), and France (90%).

In 25 EU Member States, more than half of respondents totally agree that organic food products are more expensive than other food products, with the highest scores in Greece (80%), Czechia (75%), and Estonia (74%).

QA14.2 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They are more expensive than other food products)



Since 2020, the proportion of respondents who believe that organic food products are **more expensive than other food products** has increased in 14 EU Member States, most notably in Cyprus (97%, +5 percentage points) and Croatia (93%, +5). Conversely, it has decreased by no more than two percentage points in nine countries, including Spain (93%, -2), Bulgaria (92%, -2), and Belgium (91%, -2). The proportion is unchanged in Ireland, Luxembourg, Poland, and Romania.

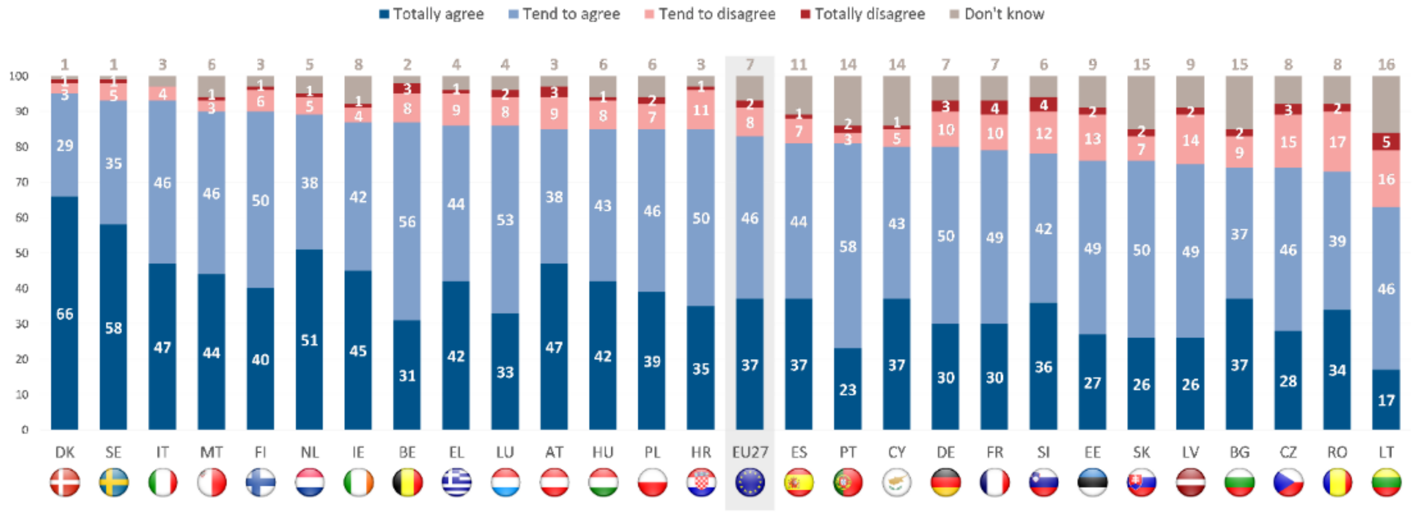
QA14.2 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They are more expensive than other food products (%)

		EU27	HR	CY	DK	IT	HU	MT	LT	PT	CZ	EL	FR	LV	SI	SE	IE	LU	PL	RO	DE	EE	NL	AT	SK	FI	BE	BG	ES
Total 'Agree'	Feb/Mar 2022	92	93	97	92	93	91	91	94	96	95	98	90	91	96	97	95	93	91	78	93	97	96	85	93	96	91	92	93
	Δ Aug/Sep 2020	▲1	▲5	▲5	▲4	▲4	▲3	▲3	▲2	▲2	▲1	▲1	▲1	▲1	▲1	▲1	=	=	=	=	▼1	▼1	▼1	▼1	▼1	▼1	▼2	▼2	▼2
Total 'Disagree'	Feb/Mar 2022	6	6	2	7	5	7	4	3	1	4	2	8	6	3	3	3	7	6	19	6	2	4	14	4	3	8	4	4
	Δ Aug/Sep 2020	▼1	▼5	▼2	▼4	▼3	▼1	▲2	▼3	▼2	=	=	▼1	=	▼1	▼1	▼2	=	=	▲1	=	=	▲1	▲2	▲1	=	▲2	▲1	=

In all 27 EU Member States, more than six in ten respondents believe that organic food products **comply with specific rules on pesticides, fertilisers, and antibiotics**. Over nine in ten respondents agree with this in Denmark (95%), and Italy and Sweden (both 93%). At the other end of the scale, fewer than three-quarters of respondents share this opinion in Lithuania (63%), Romania (73%), and Bulgaria and Czechia (both 74%).

More than half of respondents totally agree with this statement in Denmark (66%), Sweden (58%), and the Netherlands (51%).

QA14.5 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They comply with specific rules on pesticides, fertilisers, and antibiotics)



Since 2020, the share of respondents who agree that organic food products **comply with specific rules on pesticides, fertilisers, and antibiotics** has risen in 15 EU Member States, particularly in Italy (93%, +6 percentage points). Meanwhile, it has fallen in eight countries, most notably in Spain (81%, -8). It is unchanged in Denmark, Malta, Germany, and Slovenia.

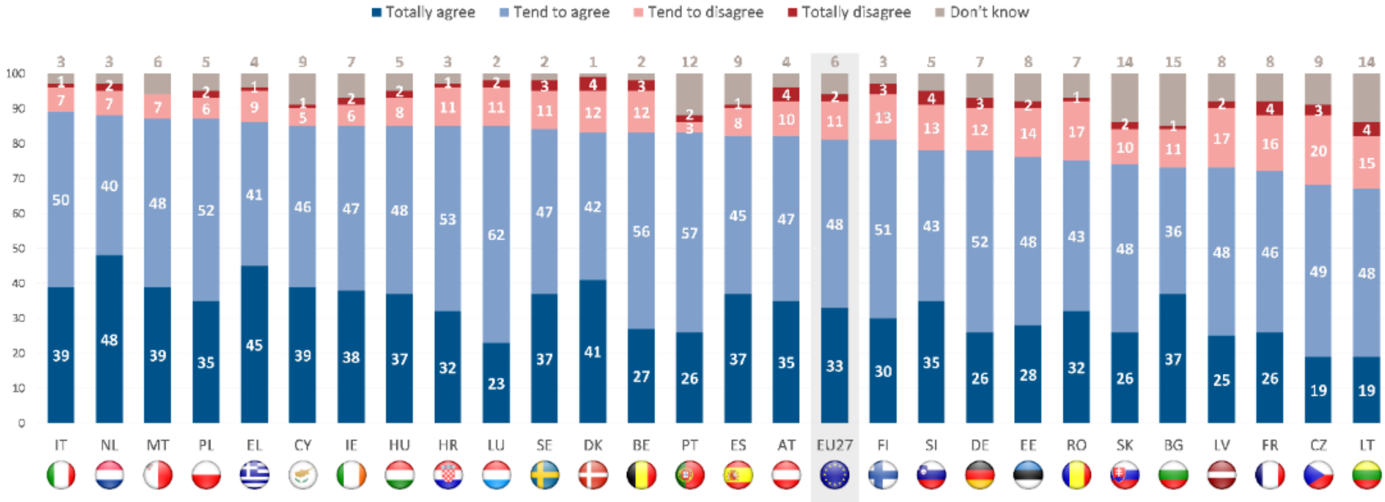
QA14.5 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They comply with specific rules on pesticides, fertilisers, and antibiotics (%)

		EU27	IT	FR	HR	BG	LV	PL	PT	SK	LU	CZ	EL	LT	HU	NL	RO	DK	DE	MT	SI	SE	BE	FI	AT	IE	CY	EE	ES
Total 'Agree'	Feb/Mar 2022	83	93	79	85	74	75	85	81	76	86	74	86	63	85	89	73	95	80	90	78	93	87	90	85	87	80	76	81
	Δ Aug/Sep 2020	▲1	▲6	▲5	▲4	▲3	▲3	▲3	▲3	▲3	▲2	▲1	▲1	▲1	▲1	▲1	▲1	=	=	=	=	▼1	▼2	▼2	▼4	▼6	▼6	▼7	▼8
Total 'Disagree'	Feb/Mar 2022	10	4	14	12	11	16	9	5	9	10	18	10	21	9	6	19	4	13	4	16	6	11	7	12	5	6	15	8
	Δ Aug/Sep 2020	▼2	▼5	▼4	▼4	▼2	▼1	▼1	▼5	▼6	▼6	▲3	=	▼5	=	▼2	=	▲1	▼1	▲3	▼1	▲1	▲1	▼1	▲3	▼2	▼2	▼2	=

Over two-thirds of respondents in all 27 EU Member States, agree that organic food products **are produced with better environmental practices than other food products**, with the highest numbers in Italy (89%), the Netherlands (88%), and Poland and Malta (both 87%), and the lowest in Lithuania (67%), Czechia (68%), and France (72%).

More than four in ten respondents totally agree that organic food products are produced with better environmental practices than other food products in the Netherlands (48%), Greece (45%), and Denmark (41%).

QA14.4 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They are produced with better environmental practices than other food products)



Since 2020, the opinion that organic food products **are produced with better environmental practices than other food products** has lost ground in 14 EU Member States, particularly Spain and Austria (82%, -6 percentage points in both countries). However, it has gained ground in 11 countries, most dramatically in Czechia (68%, +10). Views are unchanged in the Netherlands and Malta.

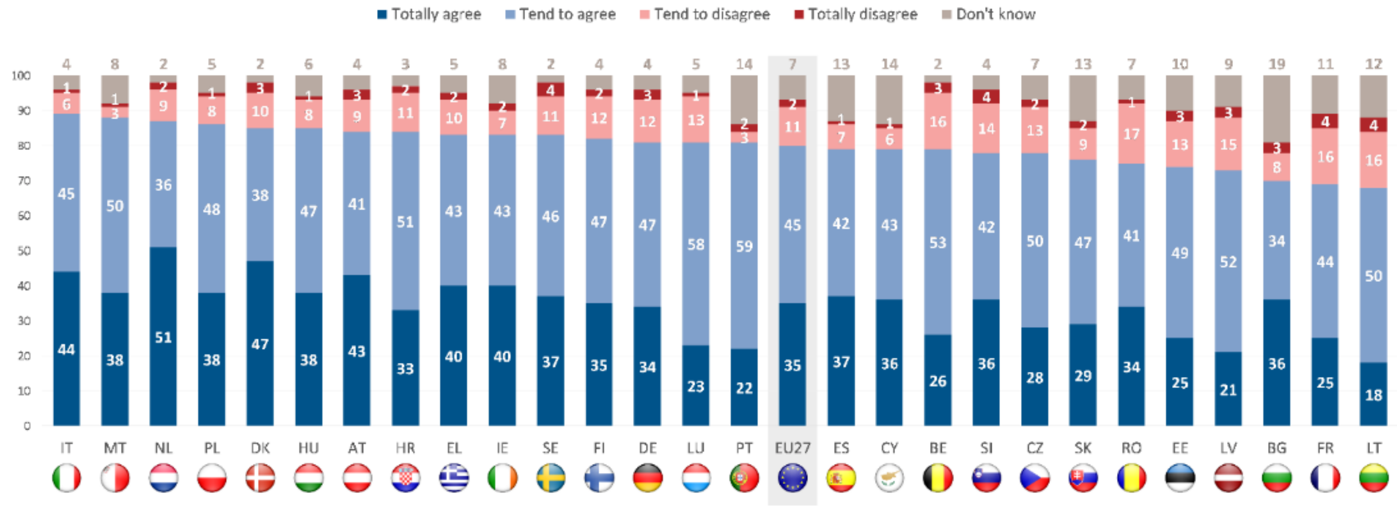
QA14.4 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They are produced with better environmental practices than other food products (%)

		EU27	CZ	EL	HR	HU	IT	PL	SK	FI	BG	FR	LU	MT	NL	LT	PT	RO	DK	EE	CY	SE	DE	LV	SI	BE	IE	ES	AT
Total 'Agree'	Feb/Mar 2022	81	68	86	85	85	89	87	74	81	73	72	85	87	88	67	83	75	83	76	85	84	78	73	78	83	85	82	82
	Δ Aug/Sep 2020	=	▲10	▲6	▲5	▲5	▲4	▲4	▲4	▲3	▲1	▲1	▲1	=	=	▼1	▼1	▼1	▼2	▼2	▼2	▼2	▼3	▼3	▼3	▼4	▼5	▼6	▼6
Total 'Disagree'	Feb/Mar 2022	13	23	10	12	10	8	8	12	16	12	20	13	7	9	19	5	18	16	16	6	14	15	19	17	15	8	9	14
	Δ Aug/Sep 2020	=	▲3	▼3	▼5	▼3	▼2	▼2	▼5	▼6	=	=	▼3	▲4	▼1	▼3	▼2	▲1	▲4	▼6	▼2	=	▲1	▲6	▲1	▲3	▼2	▲1	▲4

In all 27 EU Member States, more than two-thirds of respondents agree that organic food products **respect higher animal welfare standards than other food products**, with proportions varying between 89% in Italy, 88% in Malta, 87% in the Netherlands, 68% in Lithuania, 69% in France, and 70% in Bulgaria.

More than four in ten respondents totally agree with this in the Netherlands (51%), Denmark (47%), Italy (44%), and Austria (43%).

QA14.6 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They respect higher animal welfare standards than other food products)



Since 2020, the proportion of respondents who consider that organic food products **respect higher animal welfare standards than other food products** has increased in 16 EU Member States, most notably in Italy (89%, +8 percentage points). Conversely, it has decreased in ten countries, most notably in Spain (79%, -8). It is unchanged in Slovakia.

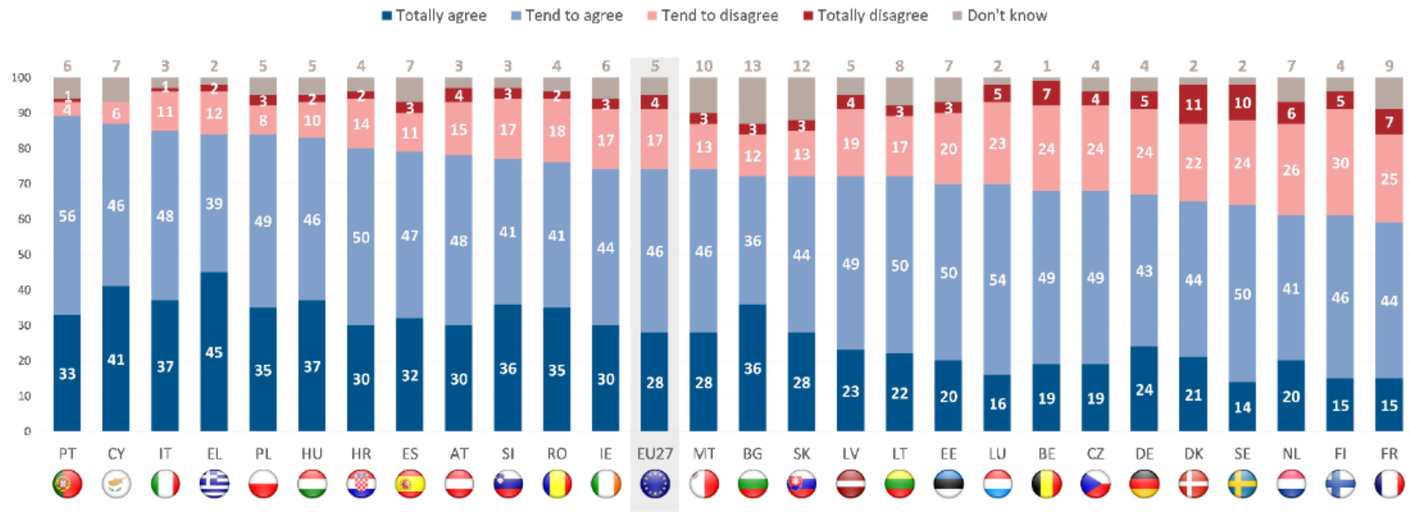
QA14.6 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They respect higher animal welfare standards than other food products (%)

		EU27	IT	HR	LV	HU	BG	LT	DK	FR	LU	PT	RO	FI	CZ	EL	MT	PL	SK	DE	AT	SE	IE	CY	NL	SI	BE	EE	ES
Total 'Agree'	Feb/Mar 2022	80	89	84	73	85	70	68	85	69	81	81	75	82	78	83	88	86	76	81	84	83	83	79	87	78	79	74	79
	Δ Aug/Sep 2020	=	▲8	▲7	▲4	▲4	▲3	▲3	▲2	▲2	▲2	▲2	▲2	▲2	▲1	▲1	▲1	▲1	=	▼2	▼2	▼2	▼3	▼3	▼3	▼3	▼4	▼6	▼8
Total 'Disagree'	Feb/Mar 2022	13	7	13	18	9	11	20	13	20	14	5	18	14	15	12	4	9	11	15	12	15	9	7	11	18	19	16	8
	Δ Aug/Sep 2020	▼1	▼6	▼6	=	▼2	▼1	▼3	▲1	▼1	▼7	▼4	▼2	▼6	=	▲1	▲2	▲1	▼3	▲1	=	=	▼5	▼2	▲3	▲2	▲4	▼4	▼1

In all 27 EU Member States, over half of respondents agree that organic food products **are of better quality than other food products**, with proportions ranging from 89% in Portugal, 87% in Cyprus and 85% in Italy, to 59% in France, and 61% in both Finland and the Netherlands.

More than four in ten respondents totally agree with this idea in Greece (45%) and Cyprus (41%).

QA14.1 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They are of better quality than other food products)



Since 2020, the share of respondents who believe that products coming from "organic" agriculture **are of better quality than other food products** has fallen in 16 EU Member States, particularly in Germany (67%, -8 percentage points). Meanwhile, it has risen slightly in ten countries, most notably in Italy (85%, +4), Poland (84%, +4), and Finland (61%, +4). It is unchanged in Lithuania.

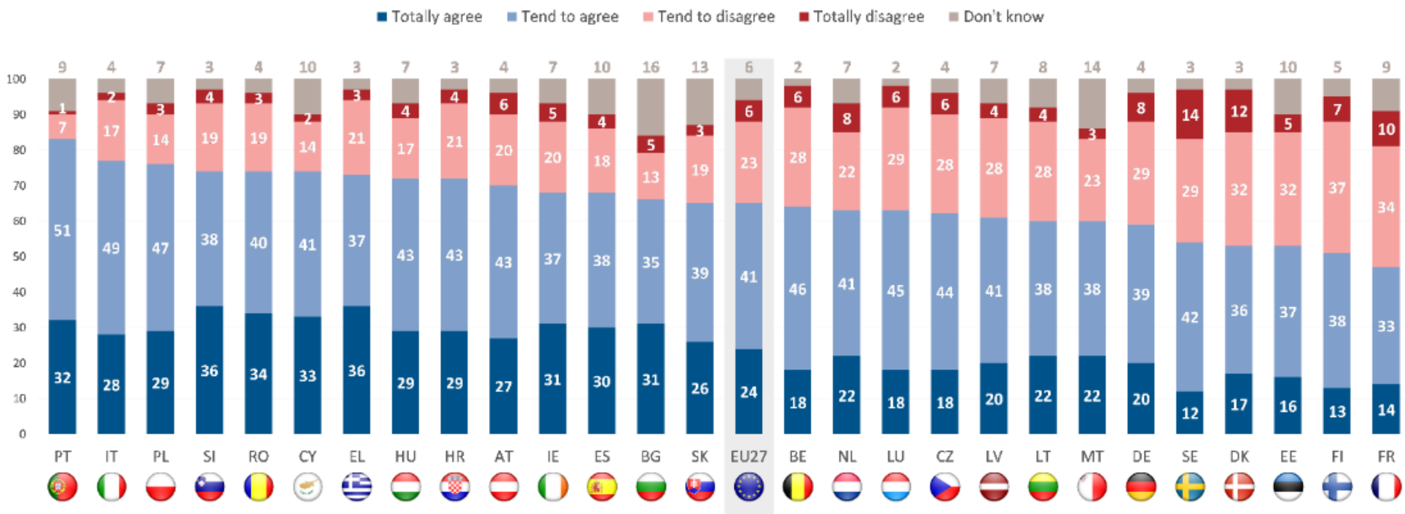
QA14.1 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They are of better quality than other food products (%)

		EU27	IT	PL	FI	EE	HR	HU	PT	EL	FR	NL	LT	LU	RO	ES	CY	SI	SK	BG	CZ	DK	IE	AT	LV	SE	BE	MT	DE
Total 'Agree'	Feb/Mar 2022	74	85	84	61	70	80	83	89	84	59	61	72	70	76	79	87	77	72	72	68	65	74	78	72	64	68	74	67
	Δ Aug/Sep 2020	=	▲4	▲4	▲4	▲3	▲3	▲2	▲2	▲1	▲1	▲1	=	▼1	▼1	▼2	▼2	▼2	▼2	▼3	▼3	▼3	▼3	▼4	▼5	▼5	▼6	▼7	▼8
Total 'Disagree'	Feb/Mar 2022	21	12	11	35	23	16	12	5	14	32	32	20	28	20	14	6	20	16	15	28	33	20	19	23	34	31	16	29
	Δ Aug/Sep 2020	▼1	▼2	▼2	▼8	▼10	▼4	▼2	▼2	▼1	▼2	▼5	▼3	▼1	▲2	▼4	=	▲1	=	▲2	▲7	▲4	▼3	▲2	▲6	▲3	▲6	▲7	▲7

A majority or relative majority of respondents agree that organic food products **taste better than other food products** in all 27 EU Member States. More than three-quarters of respondents hold this view in Portugal (83%), Italy (77%), and Poland (76%). The relative majority is narrower in France (47% versus 44%), Finland (51%), and Denmark and Estonia (both 53%).

At least a third of respondents totally agree with this statement in Greece and Slovenia (both 36%), Romania (34%), and Cyprus (33%).

QA14.3 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They taste better than other food products)



Since 2020, the belief that organic food products **taste better than other food products** has lost ground in 15 EU Member States, including by double digits in Sweden (54%, -10 percentage points). However, it has gained ground in nine countries, most notably in Croatia (72%, +6). It is unchanged in Slovakia, Lithuania, and Finland.

QA14.3 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They taste better than other food products (%)

		EU27	HR	IT	PL	CZ	HU	NL	BG	CY	EE	LT	SK	FI	PT	DK	FR	SI	LU	RO	BE	DE	EL	MT	IE	ES	LV	AT	SE
Total 'Agree'	Feb/Mar 2022	65	72	77	76	62	72	63	66	74	53	60	65	51	83	53	47	74	63	74	64	59	73	60	68	68	61	70	54
	Δ Aug/Sep 2020	=	▲6	▲5	▲5	▲3	▲3	▲3	▲2	▲2	▲1	=	=	=	▼1	▼2	▼2	▼2	▼3	▼3	▼4	▼4	▼4	▼4	▼5	▼5	▼5	▼7	▼10
Total 'Disagree'	Feb/Mar 2022	29	25	19	17	34	21	30	18	16	37	32	22	44	8	44	44	23	35	22	34	37	24	26	25	22	32	26	43
	Δ Aug/Sep 2020	=	▼6	▼4	▼5	▲1	▼2	▼4	▼1	▼3	▼11	=	=	▼5	=	▲5	▲2	▲1	▲1	▲4	▲4	▲6	▲4	▲8	▼2	=	▲7	▲5	▲7

National differences are more significant regarding the statement that organic food products **are difficult to find in the supermarkets, shops or markets in the area where respondents live**.

A majority or relative majority of respondents agree with this statement in 13 EU Member States, with the highest scores in Hungary (69%), Croatia (67%) and Cyprus (65%). The majority is smaller in Italy and Portugal (50% versus 46% in both countries), and Latvia (51%).

More than a quarter of respondents totally agree with this statement in Hungary and Malta (both 29%), Romania (28%), and Croatia (26%).

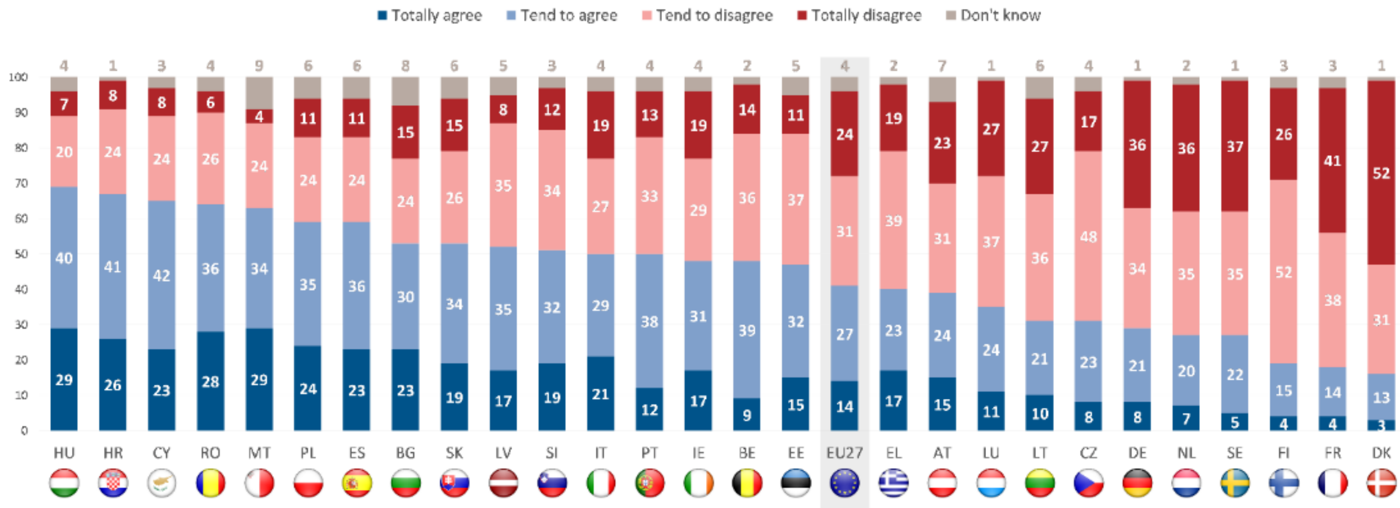
Conversely, only a minority of respondents think that organic food products are difficult to find in the supermarkets, shops or markets in the area where they live in 13 EU Member States. Fewer than one in five respondents share this opinion in Denmark (16% versus 83%), France (18% vs 79%), and Finland (19% vs 78%), compared with at least four in ten in Belgium (48% vs 50%), Estonia (47% vs 48%), and Greece (40% vs 58%).

More than a third of respondents totally disagree that organic food products are difficult to find in the supermarkets, shops or markets in the area where they live in Denmark (52%), France (41%), Sweden (37%), and Germany and the Netherlands (both 36%).

Respondents in Ireland are divided on the issue (48% agree versus 48% disagree).

Since 2020, the proportion of respondents who agree that organic food products **are difficult to find in the supermarkets, shops or markets in the area where they live** has decreased in 15 EU Member States, most strikingly in Portugal (50%, -13 percentage points), Greece (40%, -12), Austria (39%, -12), and Czechia (31%, -10). However, it has increased in ten countries, most notably in Malta (63%, +9) and Cyprus (65%, +6). It is unchanged in Germany and France.

QA14.7 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - They are difficult to find in the supermarkets, shops or markets in the area where you live)



QA14.7 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
They are difficult to find in the supermarkets, shops or markets in the area where you live (%)

		EU27	MT	CY	BE	IE	PL	DK	NL	HR	LV	LU	DE	FR	IT	BG	ES	EE	HU	RO	SI	SK	SE	LT	FI	CZ	EL	AT	PT
Total 'Agree'	Feb/Mar 2022	41	63	65	48	48	59	16	27	67	52	35	29	18	50	53	59	47	69	64	51	53	27	31	19	31	40	39	50
	Δ Aug/Sep 2020	▼2	▲9	▲6	▲5	▲5	▲5	▲4	▲3	▲2	▲2	▲1	=	=	▼2	▼3	▼3	▼5	▼5	▼5	▼5	▼6	▼6	▼7	▼7	▼10	▼12	▼12	▼13
Total 'Disagree'	Feb/Mar 2022	55	28	32	50	48	35	83	71	32	43	64	70	79	46	39	35	48	27	32	46	41	72	63	78	65	58	54	46
	Δ Aug/Sep 2020	▲1	▼7	▼4	▼6	▼9	▼4	▼3	▼3	▼1	=	▼2	=	=	▲3	▲4	=	=	▲7	▲6	▲4	▲4	▲5	▲7	▲4	▲11	▲11	▲7	▲13

The socio-demographic data reveal that over half of respondents agree with six statements related to food products from "organic" agriculture in all socio-demographic categories:

- Respondents aged 15-24 (77%) are more likely than those aged 55 and over (70%) to agree that organic food **products are of better quality than other food products**;
- Europeans who continued in education up to age 20 or beyond are more likely than those who left school at age 15 or earlier to agree with these six statements, particularly the statements that organic food products **comply with specific rules on pesticides, fertilisers, and antibiotics** (88% compared with 76%) and **are produced with better environmental practices than other food products** (85% compared with 74%);
- Similarly, respondents who never or almost never have difficulties paying their bills are more likely than those who have such difficulties most of the time to agree that organic food products **are produced with better environmental practices than other food products** (82% compared with 73%) and **comply with specific rules on pesticides, fertilisers, and antibiotics** (84% compared with 76%);

Moreover, respondents who think that agriculture and rural areas are important for the future in the European Union are the most likely to agree with the six statements, particularly with the statements that organic food products **are produced with better environmental practices than other food products** (82%, compared with 63% among those who believe that agriculture and rural areas are not important) and **respect higher animal welfare standards than other food products** (81% compared with 64%).

Similarly, Europeans who consider that the CAP benefits all European citizens and not only farmers are also the most likely to agree with these six statements.

However, in most socio-demographic categories, a minority of respondents agree that organic food products **are difficult to find in the supermarkets, shops or markets in the area where they live**:

- The level of agreement on this statement are lowest among Europeans who continued in education up to age 20 or beyond (35%) and managers (33%);
- However, a relative majority agree with this statement among respondents who left school at age 15 or earlier (48%), and those who have difficulties paying their bills most of the time or from time to time (49% in both demographics).

QA14 Do you agree or not with the following statements related to food products coming from « organic » agriculture...?
(% - EU)

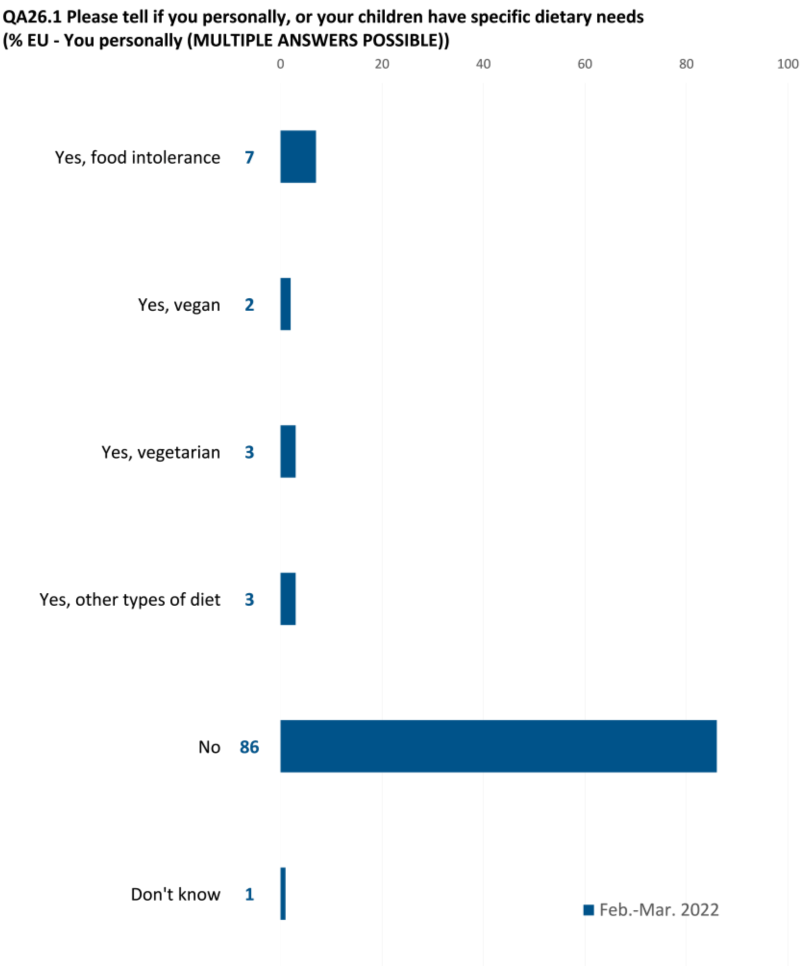
	They are of better quality than other food products		They are more expensive than other food products		They taste better than other food products		They are produced with better environmental practices than other food products		They comply with specific rules on pesticides, fertilisers, and antibiotics		They respect higher animal welfare standards than other food products		They are difficult to find in the supermarkets, shops or markets in the area where you live	
	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'
EU27	74	21	92	6	65	29	81	13	83	10	80	13	41	55
Age														
15-24	77	19	90	7	66	26	83	11	83	10	83	11	39	57
25-39	76	20	91	8	66	30	81	15	84	11	80	15	43	55
40-54	74	21	93	6	67	28	83	12	85	10	82	12	41	57
55 +	70	23	92	5	63	29	79	13	81	11	79	12	41	54
Education (End of)														
15-	69	22	91	5	63	27	74	14	76	12	76	11	48	45
16-19	73	22	93	6	64	30	80	14	83	11	81	13	44	53
20+	74	22	93	6	67	29	85	11	88	8	82	13	35	63
Still studying	77	18	90	7	65	28	83	11	84	9	84	10	37	59
Socio-professional category														
Self-employed	76	20	93	6	70	26	85	11	88	8	83	13	43	56
Managers	75	22	95	4	68	29	85	11	89	8	84	12	33	66
Other white collars	77	20	92	7	69	27	84	12	88	8	84	12	42	56
Manual workers	75	21	92	7	65	29	80	14	82	12	82	13	46	51
House persons	72	20	88	8	64	25	73	15	78	10	72	15	42	50
Unemployed	66	26	91	7	58	33	76	17	78	13	73	17	42	55
Retired	69	23	92	5	61	31	77	14	80	11	78	13	40	54
Students	77	18	90	7	65	28	83	11	84	9	84	10	37	59
Difficulties paying bills														
Most of the time	71	22	93	5	59	32	73	18	76	16	76	15	49	46
From time to time	76	19	90	8	69	25	81	13	81	12	79	14	49	48
Almost never/ Never	73	22	93	5	64	30	82	12	84	10	81	12	38	59
View on agriculture and rural areas in EU														
Important	74	21	92	6	65	29	82	12	83	10	81	12	41	55
Not Important	61	35	78	20	54	41	63	34	68	28	64	32	47	50
Common Agricultural Policy (CAP) benefits citizens														
Agree	77	19	93	5	68	27	84	11	86	8	84	11	44	53
Disagree	64	31	87	11	56	38	71	23	75	20	70	23	38	59

4. Having individual dietary needs

More than eight in ten Europeans say that neither they personally nor their children have specific dietary needs

Respondents were asked whether they personally or their children have specific dietary needs, meaning they can't consume certain products, e.g. they are vegetarian or vegan, or have food intolerances (lactose, nuts, gluten, etc.)[49]:

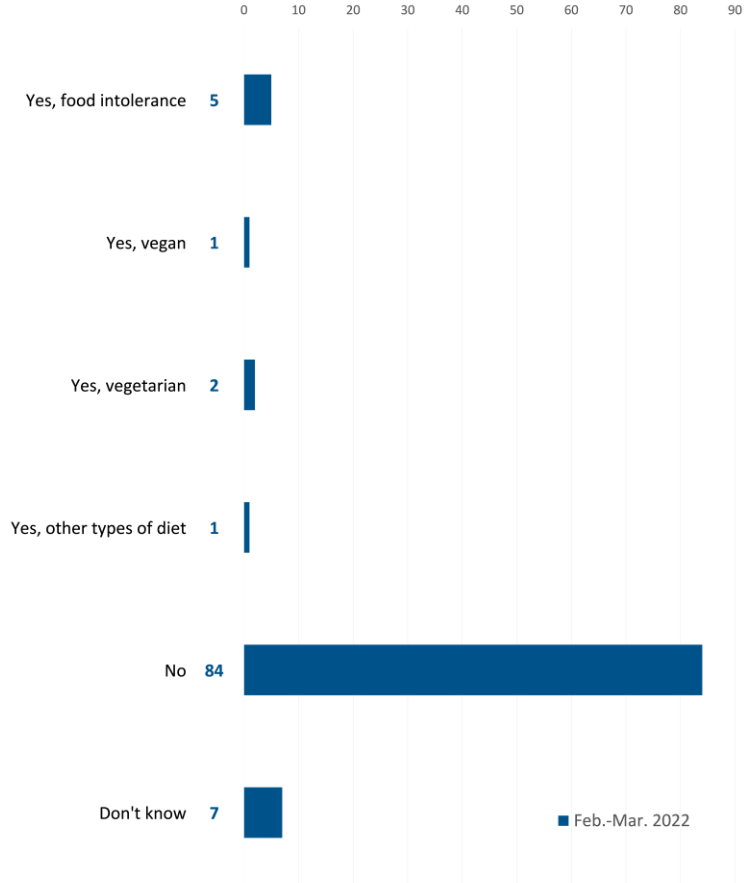
More than eight in ten Europeans (86%) say **they personally don't have any specific dietary need**. Conversely, more than one in ten (13%) do have such dietary needs. More specifically, 7% say they have **'food intolerance'**, 3% have **'other types of diet'**, 3% are **'vegetarian'** and 2% are **'vegan'**. 1% say they 'don't know'.



[49] QA26. Some people have specific dietary needs which means they can't consume certain products, e.g. vegetarian or vegan, or food intolerances (lactose, nuts, gluten, etc.). Please tell if you personally, or your children have specific dietary needs: 1. You personally; 2. Your children or one of your children. Yes, food intolerance; Yes, vegan; Yes, vegetarian; Yes, other types of diet; No; Don't know (MULTIPLE ANSWERS POSSIBLE)

A similar proportion (84%) say **their children or one of their children don't have any specific dietary need**. However, close to one in ten (9%) answer that at least one of their children has such dietary needs, including 5% with **'food intolerance'**, 2% who are **'vegetarian'**, 1% who have **'other types of diet'** and 1% who are **'vegan'**. Almost one in ten (7%) say they 'don't know'.

QA26.2 Please tell if you personally, or your children have specific dietary needs
(% EU - Your children or one of your children (MULTIPLE ANSWERS POSSIBLE))



A national analysis reveals that, in all 27 EU Member States, at least seven in ten respondents say **they personally don't have any specific dietary need**. Over nine in ten respondents hold this view in Portugal (95%), Greece (93%), and Ireland and Hungary (both 92%). The proportion is lower in Finland (70%), and Belgium, the Netherlands and Sweden (all 77%).

However, at least one in ten respondents say they do have such dietary needs in 23 EU Member States, with the highest proportions in Finland (29%), the Netherlands (23%), and Belgium, Sweden and Malta (all 22%). More precisely:

- At least one in ten respondents have **'food intolerance**' in eight EU Member States, with the highest levels in Finland (17%), and Malta and Sweden (both 12%);
- Respondents in Malta (8%), Cyprus (7%), and the Netherlands (6%) are the most likely to have **'other types of diet'**;
- Respondents in Austria, Finland, and the Netherlands (all 8%) are the most likely to say they are **'vegetarian'**;
- Those in Austria and Romania (both 4%) are the most likely to be **'vegan'**.

QA26.1 Please tell if you personally, or your children have specific dietary needs
You personally (MULTIPLE ANSWERS POSSIBLE) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Yes, food intolerance	7	10	3	9	10	8	11	4	3	6	5	7	7	4	7	7	10	4	12	10	8	5	1	3	6	6	17	12
Yes, vegan	2	2	1	1	0	2	1	0	1	0	1	2	2	1	1	1	3	0	0	0	4	3	0	4	2	0	2	2
Yes, vegetarian	3	5	2	2	4	4	2	1	1	1	2	2	2	2	3	1	7	0	2	8	8	0	1	4	4	1	8	7
Yes, other types of diet	3	5	5	1	3	4	3	1	2	4	4	5	1	7	1	4	1	4	8	6	2	2	1	3	4	4	4	1
No	**86**	**77**	**87**	**86**	**81**	**83**	**82**	**92**	**93**	**88**	**88**	**84**	**88**	**83**	**87**	**86**	**79**	**92**	**78**	**77**	**79**	**88**	**95**	**85**	**85**	**87**	**70**	**77**
Don't know	1	1	2	1	2	0	2	1	0	0	1	1	1	3	1	1	0	0	1	0	1	2	1	1	1	2	1	1
Total 'Yes'	14	22	11	13	17	17	16	6	7	12	10	15	12	14	12	12	21	8	22	23	20	10	4	14	14	11	29	22
Total 'Yes, vegan or vegetarian'	4	8	3	3	4	6	3	1	2	1	2	3	4	3	4	2	10	1	2	8	11	3	1	8	5	2	9	9

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

In all 27 EU Member States, more than seven in ten respondents say **their children or one of their children don't have any specific dietary need**, with proportions ranging from 91% in Hungary, 90% in Ireland and 89% in Spain and Portugal, to 73% in the Netherlands, Finland, and Lithuania.

Meanwhile, in 16 EU Member States, at least one in ten respondents say their children or one of their children have such dietary needs, while the figure is as much as one in five in the Netherlands (21%), and Finland and Belgium (both 20%). In detail:

- In seven EU Member States, at least one in ten respondents say their children or one of their children have **'food intolerance**', most notably in Estonia, Finland, and Luxembourg (all 12%);
- Belgium and the Netherlands (both 6%) have the highest proportion of respondents with at least one child who is **'vegetarian'**;
- Respondents in Finland, the Netherlands, Bulgaria, Croatia, and Cyprus (all 4%) are the most likely to answer that their children or one of their children have **'other types of diet'**;
- Respondents in Romania (4%) are the most likely to have at least one of their children who is **'vegan'**.

QA26.2 Please tell if you personally, or your children have specific dietary needs
Your children or one of your children (MULTIPLE ANSWERS POSSIBLE) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Yes, food intolerance	5	10	2	8	8	4	12	2	1	2	5	6	4	2	8	4	12	3	11	11	3	5	1	2	7	5	12	10
Yes, vegan	1	2	1	2	1	2	2	0	0	0	1	1	2	2	0	1	3	0	2	2	2	3	0	4	1	0	2	1
Yes, vegetarian	2	6	1	2	3	4	2	1	1	1	1	2	2	1	2	1	4	0	2	6	3	1	1	4	4	2	4	3
Yes, other types of diet	1	3	4	1	1	1	2	1	1	2	1	4	1	4	1	2	0	1	1	4	2	1	1	2	2	2	4	1
No	84	75	83	84	82	88	76	90	84	89	78	83	84	84	86	73	78	91	82	73	79	87	89	84	85	85	73	80
Don't know	7	4	9	3	6	2	8	6	13	6	14	3	8	7	3	20	3	5	3	7	12	4	9	4	2	5	7	5
Total 'Yes'	9	20	9	12	12	10	16	4	3	5	7	13	8	9	11	7	19	4	15	21	10	9	2	11	13	10	20	15
Total 'Yes, vegan or vegetarian'	4	8	2	4	4	5	3	1	1	1	2	3	3	3	3	1	7	0	3	7	5	3	1	8	5	2	6	4

Highest percentage per country
Lowest percentage per country
Highest percentage per item
Lowest percentage per item

The socio-demographic data reveal that more than seven in ten respondents in every socio-demographic category say that neither they personally nor their children have specific dietary needs. However:

- Women (16%) are more likely than men (11%) to have such dietary needs;
- Respondents aged 15-24 (18%) are the most likely to say that they have such dietary needs compared with 11% among those aged 55 and over;
- Europeans who continued in education up to age 20 or beyond are the most likely to have such dietary needs (16%, compared with 8% among those who left school at age 15 or earlier) or to have at least one child with such dietary needs (13% compared with 5%);
- Students (21%) are by far the most likely to have specific dietary needs compared with 11% among retired people;
- Respondents who have difficulties paying their bills most of the time (19%) are the most likely to have specific dietary needs compared with 13% among other categories;
- Respondents who live in a large town (16%) are also more likely than those who live in a rural village (11%) to have specific dietary needs.

In addition, respondents who think that agriculture and rural areas are important for the future in the European Union are the least likely to have specific dietary needs (13%, compared with 29% among those who believe that agriculture and rural areas are not important) or to have at least one child with such dietary needs (9% compared with 24%). They are also far less likely to be **vegan or vegetarian** (4% compared with 15%).

QA26 Please tell if you personally, or your children have specific dietary needs (MULTIPLE ANSWERS POSSIBLE) (% - EU)

	You personally				Your children or one of your children			
	No	Don't know	Total 'Yes'	Total 'Yes, vegan or vegetarian'	No	Don't know	Total 'Yes'	Total 'Yes, vegan or vegetarian'
EU27	86	1	14	4	84	7	9	4
Gender								
Man	88	1	11	3	84	8	8	3
Woman	83	1	16	5	84	6	10	4
Age								
15-24	80	1	18	8	81	15	4	2
25-39	84	1	15	6	84	7	9	3
40-54	85	0	14	4	84	4	12	4
55 +	88	1	11	2	85	6	9	4
Education (End of)								
15-	91	1	8	1	88	7	5	2
16-19	88	1	12	3	85	6	9	3
20+	83	1	16	5	82	5	13	5
Still studying	78	1	21	10	81	14	4	2
Socio-professional category								
Self-employed	84	1	16	4	82	5	13	4
Managers	85	1	14	5	83	4	12	5
Other white collars	86	0	14	5	86	5	10	4
Manual workers	87	1	13	4	84	7	10	4
House persons	87	0	12	2	88	4	9	2
Unemployed	85	1	14	4	79	12	9	3
Retired	88	1	11	3	85	6	8	3
Students	78	1	21	10	81	14	4	2
Difficulties paying bills								
Most of the time	79	2	19	5	79	9	12	4
From time to time	86	1	13	5	84	7	9	4
Almost never/ Never	86	1	13	4	85	6	9	3
Subjective urbanisation								
Rural village	88	1	11	3	85	6	9	4
Small/ mid size town	85	1	14	5	83	7	10	4
Large town	84	1	16	5	85	7	8	3
View on agriculture and rural areas in EU								
Important	86	1	13	4	85	7	9	3
Not Important	70	1	29	15	71	5	24	15

VI. THE EU SCHOOL SCHEME

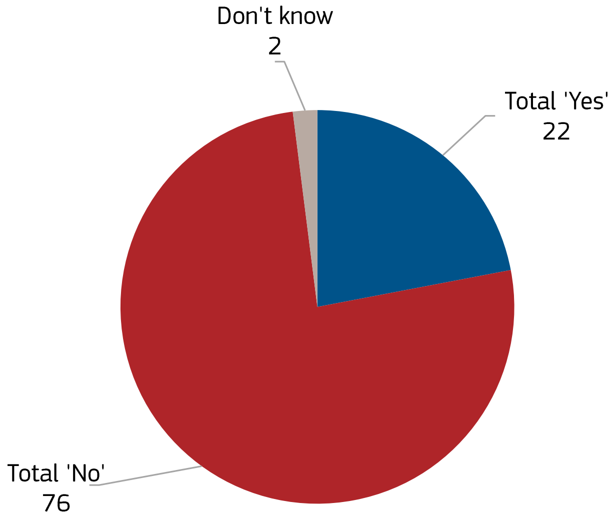
This sixth and final chapter focuses on the EU school scheme. First, it assesses whether respondents currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme. It then examines Europeans' preferences for products distributed through the EU school scheme. It concludes with an overview of opinions on the topics that should be covered by the educational measures in the EU school scheme.

1. Benefitting from the EU school scheme

More than a fifth of Europeans say they currently have children who benefit from the distribution of fruits, vegetables, milk and milk products through the EU school scheme

More than a fifth of respondents (22%) say that **they currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme**[50]. Conversely, almost eight in 10 respondents (76%) say they don't currently have children who benefit from the EU school scheme. 2% say they 'don't know'.

QA22 Do you have currently children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme?
(% - EU)



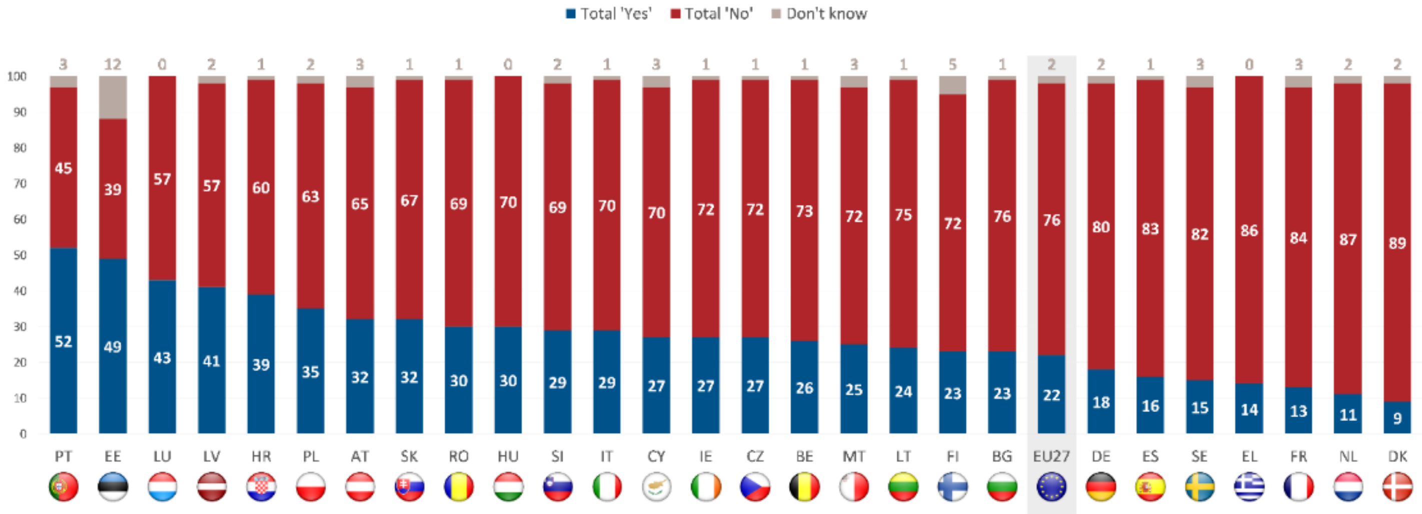
(Feb. -Mar. 2022)

[50] QA22. Currently the EU school scheme finances the distribution of fruits, vegetables, milk and certain milk products to schoolchildren, from nursery to secondary school, generally outside school meals. Do you have currently children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme? Yes, definitely; Yes, probably; No, probably not; No, definitely not; Don't know.

A national analysis reveals that, in 25 EU Member States, more than half of respondents say that they don't currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme, with the highest proportions in Denmark (89%), the Netherlands (87%), and Greece (86%), and the lowest in Latvia (57%), Luxembourg (57%), and Croatia (60%).

Conversely, in two countries, a majority or relative majority of respondents say they currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme. This is the case in Portugal (52%) and Estonia (49% versus 39%).

QA22 Do you have currently children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme? (%)



The socio-demographic data show that at least two-thirds of respondents say they don't currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme in all socio-demographic categories. However:

- Respondents who continued in education up to age 20 or beyond (24%) are more likely than those who left school at age 15 or earlier (19%) to say they have children who benefit from the EU school scheme;
- Other white-collar workers (30%) are more likely than unemployed people (21%) to say this;
- Europeans who have difficulties paying their bills most of the time (28%) or from time to time (29%) are more likely than those who have never or almost never such difficulties (20%) to say that they have children who benefit from the EU school scheme.

Moreover, respondents who have a positive image of the European Union are the most likely to say that they currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme (24%, compared with 18% among those who have a negative image of the EU).

Europeans who agree that the CAP benefits all European citizens and not only farmers are more likely than those who disagree with this statement to say that they currently have children who benefit from the EU school scheme (25% compared with 18%).

QA22 Do you have currently children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme? (% - EU)

	Total 'Yes'	Total 'No'
EU27	22	76
Age		
15-24	16	82
25-39	32	66
40-54	32	66
55 +	14	84
Education (End of)		
15-	19	79
16-19	25	74
20+	24	74
Still studying	14	83
Socio-professional category		
Self-employed	28	70
Managers	28	70
Other white collars	30	68
Manual workers	28	71
House persons	24	75
Unemployed	21	77
Retired	13	85
Students	14	83
Difficulties paying bills		
Most of the time	28	71
From time to time	29	70
Almost never/ Never	20	78
Consider belonging to		
The working class	20	78
The lower middle class	21	77
The middle class	24	74
The upper middle class	21	77
The upper class	21	79
Image of the EU		
Total 'Positive'	24	74
Neutral	22	76
Total 'Negative'	18	80
View on agriculture and rural areas in EU		
Important	23	75
Not Important	22	76
Common Agricultural Policy (CAP) benefits citizens		
Agree	25	73
Disagree	18	80

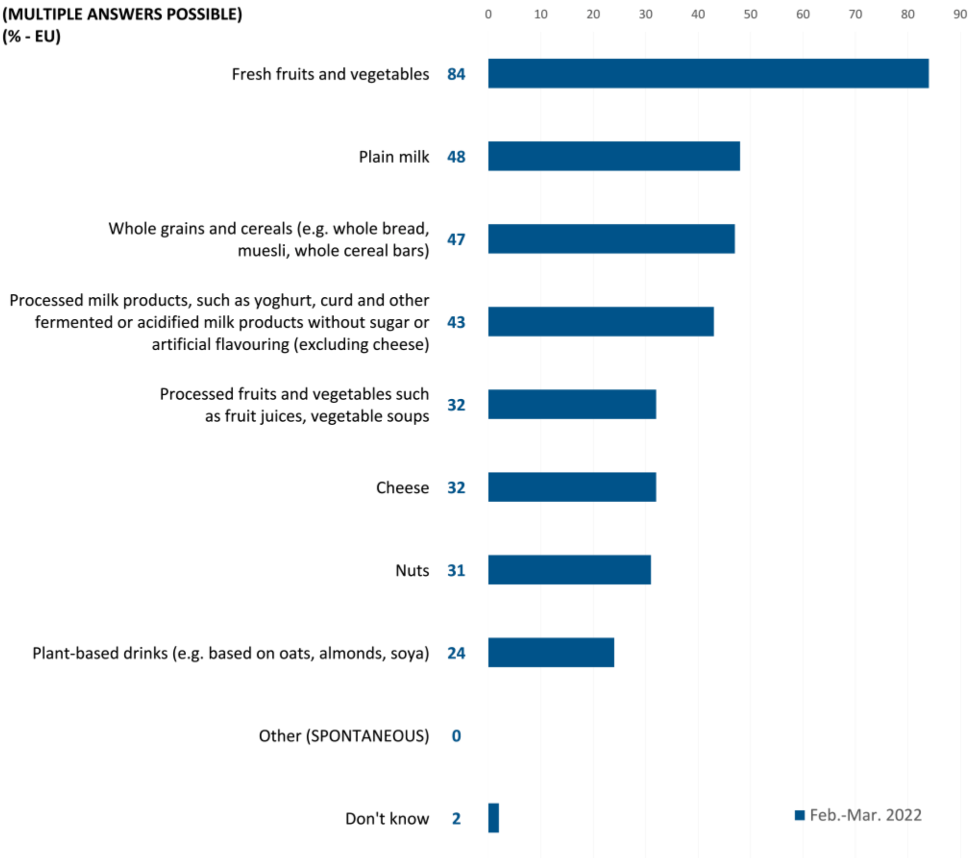
2. Preferences for products distributed through the EU school scheme

More than eight in ten Europeans consider that fresh fruits and vegetables should be distributed through the EU school scheme, somewhat ahead of any other products

All respondents – whether or not they said they currently have children who benefit from the distribution of fruits, vegetables, milk and milk products at their school through the EU school scheme in the previous question – were asked to identify the products which should be distributed through the EU school scheme, considering children's needs for healthy diets, by choosing from a list of eight products[51]. They place fresh fruits and vegetables at the top of the ranking by a wide margin:

- More than eight in ten Europeans say that **'fresh fruits and vegetables'** (84%) should be distributed through the EU school scheme;
- Almost half of respondents mention **'plain milk'** (48%) and **'whole grains and cereals (e.g. whole bread, muesli, whole cereal bars)'** (47%);
- More than four in ten Europeans include **'processed milk products, such as yoghurt, curd and other fermented or acidified milk products without sugar or artificial flavouring (excluding cheese)'** (43%) among the products that should be distributed through the EU school scheme;
- Nearly a third of respondents cite **'processed fruits and vegetables such as fruit juices, vegetable soups'** (32%), **'cheese'** (32%), and **'nuts'** (31%);
- **'Plant-based drinks (e.g. based on oats, almonds, soya)'** (24%) are mentioned by around a quarter of Europeans.

QA23 In your opinion, considering children's needs for healthy diets, which of the following products should be distributed through the EU school scheme?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



[51] QA23. In your opinion, considering children's needs for healthy diets, which of the following products should be distributed through the EU school scheme? (MULTIPLE ANSWERS POSSIBLE) Fresh fruits and vegetables; Processed fruits and vegetables such as fruit juices, vegetable soups; Plain milk; Processed milk products, such as yoghurt, curd and other fermented or acidified milk products without sugar or artificial flavouring (excluding cheese); Cheese; Plant-based drinks (e.g. based on oats, almonds, soya); Nuts; Whole grains and cereals (e.g. whole bread, muesli, whole cereal bars); Other (SPONTANEOUS); Don't know.

Fresh fruits and vegetables are the most cited products for distribution through the EU school scheme in all 27 EU Member States. More than nine in ten respondents mention fresh fruits and vegetables in the Netherlands (94%), Sweden (93%), and France (91%). Meanwhile, fewer than three-quarters of respondents share this opinion in Romania (58%), Poland (68%), and Croatia (73%).

None of the seven other items heads the list of products that respondents believe should be distributed through the EU school scheme in any of the 27 EU Member States. However:

- **Plain milk** is cited by at least half of respondents in 12 EU Member States, including close to three-quarters in Portugal (74%), significantly ahead of Greece (62%), and Ireland and Austria (both 61%);
- At least half of respondents mention **whole grains and cereals (e.g. whole bread, muesli, whole cereal bars)** in 13 EU Member States, with the highest levels in Greece (74%), Finland (73%), and Cyprus (64%);
- In 12 countries, at least half of respondents cite **processed milk products, such as yoghurt, curd and other fermented or acidified milk products without sugar or artificial flavouring (excluding cheese)**, most notably in Slovakia (60%), Estonia (59%), and Slovenia and Czechia (both 58%);
- More than four in ten respondents mention **processed fruits and vegetables such as fruit juices, vegetable soups** in seven EU Member States, most notably in Greece (52%), Slovakia (48%), and Portugal (45%);
- **Cheese** is cited by at least four in ten respondents in seven countries, with the highest proportions in Greece (60%), Bulgaria (52%), and Cyprus (49%);
- At least four in ten respondents mention **nuts** in Cyprus (50%), Lithuania (49%), Greece (46%), Spain (44%), and Slovenia (40%);
- **Plant-based drinks (e.g. based on oats, almonds, soya)** gets most mentions in Portugal (47%), Cyprus (43%), and Croatia (35%).

QA23 In your opinion, considering children's needs for healthy diets, which of the following products should be distributed through the EU school scheme? (MULTIPLE ANSWERS POSSIBLE)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Fresh fruits and vegetables	84	85	84	85	88	89	90	85	76	86	91	73	80	82	89	88	85	77	84	94	82	68	88	58	90	80	84	93
Plain milk	48	37	60	31	50	45	48	61	62	59	40	41	48	54	52	33	38	55	51	42	61	45	74	36	47	48	36	60
Whole grains and cereals (e.g. whole bread, muesli, whole cereal bars)	47	35	49	38	41	60	57	49	74	42	43	61	41	64	41	39	44	50	52	47	54	36	58	27	63	50	73	54
Processed milk products, such as yoghurt, curd and other fermented or acidified milk products without sugar or artificial flavouring (excluding cheese)	43	31	43	58	28	46	59	32	52	44	38	53	50	32	50	56	36	50	44	28	38	41	52	34	58	60	52	32
Processed fruits and vegetables such as fruit juices, vegetable soups	32	31	37	32	16	33	28	29	52	31	26	41	39	36	30	42	28	43	24	12	36	32	45	26	41	48	32	12
Cheese	32	20	52	28	14	22	26	40	60	42	45	32	41	49	23	29	26	37	28	12	30	13	37	23	35	34	31	28
Nuts	31	27	32	24	25	32	32	26	46	44	28	36	33	50	33	49	34	18	27	31	37	17	30	23	40	27	21	21
Plant-based drinks (e.g. based on oats, almonds, soya)	24	25	19	15	19	28	18	26	31	26	22	35	26	43	18	20	29	24	30	17	25	13	47	21	30	24	21	25
Other (SPONTANEOUS)	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1	1	0	0	1	0	0	0	0
Don't know	2	1	1	1	2	2	3	2	1	1	3	0	1	2	2	3	0	0	5	2	2	3	0	3	0	1	1	1

Highest percentage per country
Lowest percentage per country
Highest percentage per item
Lowest percentage per item

The socio-demographic data reveal that at least three-quarters of respondents mention fresh fruits and vegetables in every socio-demographic category. Moreover, it is the most cited product in all categories. However:

- Respondents aged 15-24 are more likely than those aged 55 and over to mention **whole grains and cereals (e.g. whole bread, muesli, whole cereal bars** (50% compared with 45%) and **plant-based drinks (e.g. based on oats, almonds, soya)** (29% compared with 22%), but less likely to cite **plain milk** (41% compared with 51%);
- Europeans who left school at age 15 or earlier are much more likely than those who continued in education up to age 20 or beyond to cite **plain milk** (58% compared with 44%), **cheese** (40% compared with 29%), but less likely to mention **whole grains and cereals (e.g. whole bread, muesli, whole cereal bars)** (43% compared with 49%);
- Respondents who have difficulties paying their bills most of the time are more likely than those who have never or almost never such difficulties to consider that **processed fruits and vegetables such as fruit juices, vegetable soups** should be distributed through the EU school scheme (38% compared with 29%), but they are less likely to share this opinion about **fresh fruits and vegetables** (75% compared with 86%);
- Respondents who live in a large town are more likely than those who live in a rural village to cite **whole grains and cereals (e.g. whole bread, muesli, whole cereal bars)** (51% compared with 43%) and **plant-based drinks (e.g. based on oats, almonds, soya)** (28% compared with 20%).

Respondents who think that agriculture and rural areas are important for the future in the European Union are the most likely to cite each of the eight products, particularly **fresh fruits and vegetables** (85%, compared with 58% among those who believe that agriculture and rural areas are not important), **plain milk** (48% compared with 30%) and **processed milk products, such as yoghurt, curd and other fermented or acidified milk products without sugar or artificial flavouring (excluding cheese)** (44% compared with 34%).

QA23 In your opinion, considering children's needs for healthy diets, which of the following products should be distributed through the EU school scheme?

	Fresh fruits and vegetables	Processed fruits and vegetables such as fruit juices, vegetable soups	Plain milk	Processed milk products, such as yoghurt, curd and other fermented or acidified milk products without sugar or artificial flavouring (excluding cheese)	Cheese	Plant-based drinks (e.g. based on oats, almonds, soya)	Nuts	Whole grains and cereals (e.g. whole bread, muesli, whole cereal bars)
EU27	84	32	48	43	32	24	31	47
Age								
15-24	83	34	41	41	31	29	33	50
25-39	83	33	45	41	29	26	31	50
40-54	84	33	47	44	31	24	32	47
55 +	84	31	51	45	34	22	29	45
Education (End of)								
15-	84	33	58	45	40	21	30	43
16-19	81	34	49	45	33	24	29	46
20+	87	28	44	41	29	23	32	49
Still studying	85	34	38	40	31	33	37	53
Difficulties paying bills								
Most of the time	75	38	52	45	36	28	31	50
From time to time	79	39	49	46	37	28	32	49
Almost never/ Never	86	29	47	42	30	22	30	46
Subjective urbanisation								
Rural village	83	32	48	42	30	20	29	43
Small/ mid size town	84	31	47	44	34	24	31	48
Large town	84	34	48	43	32	28	32	51
View on agriculture and rural areas in EU								
Important	85	32	48	44	32	24	31	47
Not Important	58	28	30	34	23	21	23	36

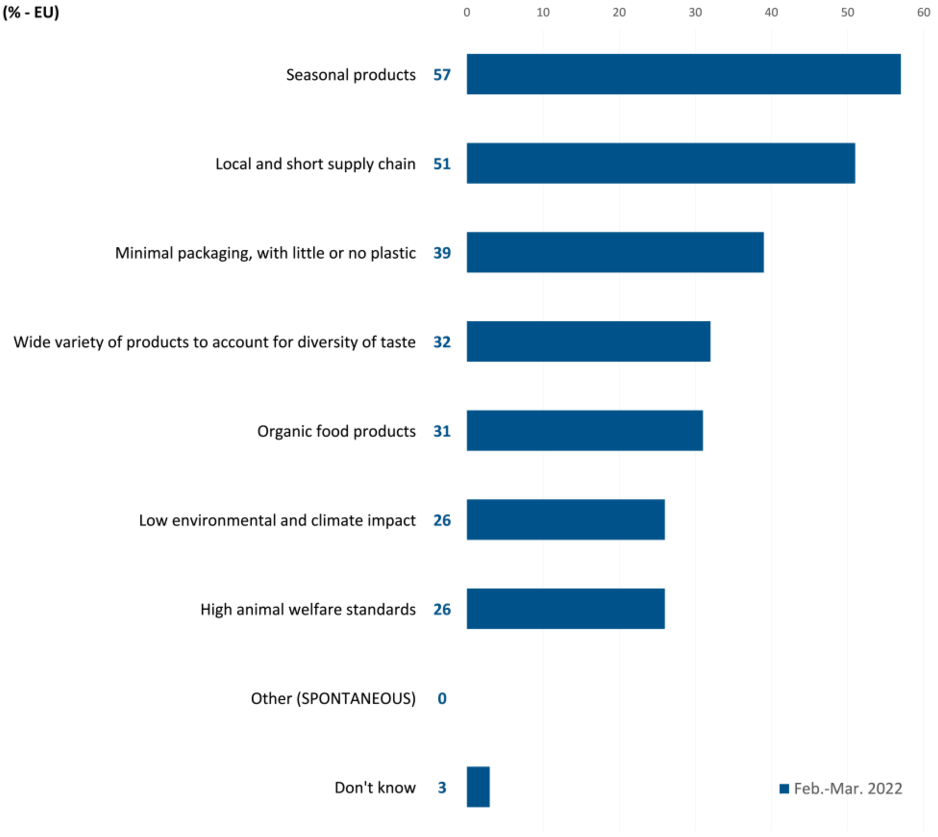
3. Important aspects for product choice under the EU School scheme

More than half of Europeans consider that seasonal products and local and short supply chains are among the most important aspects for the choice of products under the EU school scheme

When asked to identify the most important aspects for the choice of products under the EU school scheme[52] by choosing up to three items from a list of seven, respondents place seasonal products at the top of the ranking, slightly ahead of short supply chains:

- Almost six in ten Europeans mention **'seasonal products'** (57%) as one of the most important aspects for the choice of products that schoolchildren receive under the EU school scheme;
- Slightly more than half of respondents cite **'local and short supply chain'** (51%);
- Close to four in ten Europeans mention **'minimal packaging, with little or no plastic'** (39%);
- Nearly a third of respondents consider that **'wide variety of products to account for diversity of taste'** (32%) and **'organic food products'** (31%) are among the most important aspects for the choice of products under the EU school scheme;
- Slightly more than a quarter of Europeans mention **'low environmental and climate impact'** (26%) and **'high animal welfare standards'** (26%).

QA24T Which of the following do you consider to be the most important to you for the choice of products under the EU school scheme? Firstly? And then? (MAX. 3 ANSWERS)
(% - EU)



[52] QA24T. Currently, seasonality, variety, availability, health and environmental aspects underpin the choice of products that schoolchildren receive. Local and short supply chains, organic and quality scheme products may have priority. Which of the following do you consider to be the most important to you for the choice of products under the EU school scheme? Firstly? And then? (MAX. 3 ANSWERS) Wide variety of products to account for diversity of taste; Seasonal products; Organic food products; Low environmental and climate impact; Local and short supply chain; Minimal packaging, with little or no plastic; High animal welfare standards; Other (SPONTANEOUS); Don't know.

A national analysis reveals that **seasonal products** are cited most among the choices for schoolchildren to receive under the EU school scheme in 12 EU Member States: France (72%), Cyprus (71%), Greece (69%), Italy (68%), Belgium (66%), Bulgaria (63%, same score as wide variety of products to account for diversity of taste), Luxembourg (61%), Spain (59%), Czechia (57%), Latvia (56%), Croatia (53%), and Denmark (52%). In addition, more than half of respondents also mention seasonal products in Slovenia (59%), the Netherlands (55%), Germany (52%), and Finland (51%).

Local and short supply chain is the most common answer in six EU Member States: Finland (72%), Slovenia and Sweden (both 65%), Estonia (62%), Germany (56%), and Poland (44%). More than half of respondents also cite local and short supply chain in seven countries, most notably in Czechia (56%), and Italy, Latvia and Luxembourg (all 55%).

Minimal packaging, with little or no plastic is the most cited aspect for the choice of products under the EU school scheme in four EU Member States: the Netherlands (61%), Austria (54%), Malta (51%), and Ireland (46%). At least four in ten respondents also mention minimal packaging, with little or no plastic in nine countries, most notably in Germany (49%), Luxembourg (48%), and Slovenia (47%).

Wide variety of products to account for diversity of taste comes top of the list in four EU Member States: Bulgaria (63%, same score as seasonal products), Slovakia (56%), Portugal (55%), and Hungary (53%). More than half of respondents also mention it in Greece (57%) and Latvia (51%).

Organic food products is the most mentioned aspect in Lithuania (56%) and Romania (44%). It also records higher scores in Greece (50%) and Cyprus (46%).

Neither of the two other items heads the list of the most important aspects for the choice of products that schoolchildren receive under the EU school scheme in any of the 27 EU Member States. However:

- **Low environmental and climate impact** is cited by at least a third of respondents in Sweden (48%), the Netherlands (42%), Denmark (39%), and Finland (33%);
- More than three in ten respondents mention **high animal welfare standards** in Sweden (37%), Ireland (33%), Greece (32%), and Germany (31%).

QA24T Which of the following do you consider to be the most important to you for the choice of products under the EU school scheme? Firstly? And then?
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Seasonal products	57	66	63	57	52	52	41	42	69	59	72	53	68	71	56	46	61	46	44	55	50	42	41	41	59	50	51	49
Local and short supply chain	51	54	45	56	43	56	62	43	31	51	54	49	55	16	55	39	55	47	26	48	46	44	50	37	65	48	72	65
Minimal packaging, with little or no plastic	39	46	26	46	36	49	42	46	32	28	41	29	31	37	35	34	48	46	51	61	54	38	40	28	47	36	35	29
Wide variety of products to account for diversity of taste	32	23	63	42	25	24	49	41	57	32	28	48	26	49	51	43	23	53	43	21	29	41	55	38	31	56	28	11
Organic food products	31	21	34	17	32	30	34	26	50	29	21	42	37	46	40	56	26	25	33	22	35	43	32	44	34	24	15	25
Low environmental and climate impact	26	31	13	19	39	26	14	29	19	30	21	20	30	20	10	16	21	25	27	42	30	20	22	19	19	15	33	48
High animal welfare standards	26	20	13	17	21	31	11	33	32	24	28	24	25	28	10	15	29	20	29	21	29	23	27	26	16	22	27	37
Other (SPONTANEOUS)	0	0	0	0	0	1	0	0	0	0	1	0	0	0	0	2	0	0	0	1	2	0	0	0	0	0	0	0
Don't know	3	1	4	2	3	1	4	2	0	4	3	0	1	1	3	5	0	1	5	2	2	5	3	6	1	2	3	2

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

The socio-demographic data reveal that **seasonal products** are cited most among the choice of products for schoolchildren to receive under the EU school scheme in all socio-demographic categories but two:

- **Seasonal products** achieves its higher scores among respondents aged 55 and over (61%), those who left school at age 15 or earlier (63%), self-employed people (61%) and retired people (62%);
- Conversely, the relative majority of respondents who mention **seasonal products** is smaller among respondents aged 15-24 (48%) and students (49%);
- **Local and short supply chain** is the most cited aspect among managers (55%, ahead of **seasonal products**, 54% and **minimal packaging, with little or no plastic**, 41%).
- Respondents who think that agriculture and rural areas are important for the future in the European Union are much more likely than those who consider that agriculture and rural areas are not important for the future in the EU to mention **seasonal products** (58% compared with 43%), as well as **local and short supply chain** (52% compared with 39%), but they are less likely to cite **high animal welfare standards** (25% compared with 35%).

QA24T Which of the following do you consider to be the most important to you for the choice of products under the EU school scheme? Firstly? And then?
(% - EU)

	Wide variety of products to account for diversity of taste	Seasonal products	Organic food products	Low environmental and climate impact	Local and short supply chain	Minimal packaging, with little or no plastic	High animal welfare standards
EU27	32	57	31	26	51	39	26
Age							
15-24	33	48	33	31	44	42	33
25-39	31	54	34	29	49	41	26
40-54	31	58	31	26	55	39	24
55 +	33	61	28	23	53	38	24
Education (End of)							
15-	36	63	26	20	50	36	24
16-19	34	56	31	24	51	40	26
20+	28	58	32	29	55	40	24
Still studying	30	49	34	35	47	39	32
Socio-professional category							
Self-employed	30	61	33	27	56	36	23
Managers	25	54	33	32	55	41	26
Other white collars	31	54	33	29	52	40	27
Manual workers	36	57	31	24	50	40	26
House persons	30	59	32	23	46	36	24
Unemployed	33	56	28	25	47	44	28
Retired	33	62	27	21	54	39	23
Students	30	49	34	35	47	39	32
View on agriculture and rural areas in EU							
Important	32	58	31	26	52	39	25
Not Important	38	43	23	27	39	40	35

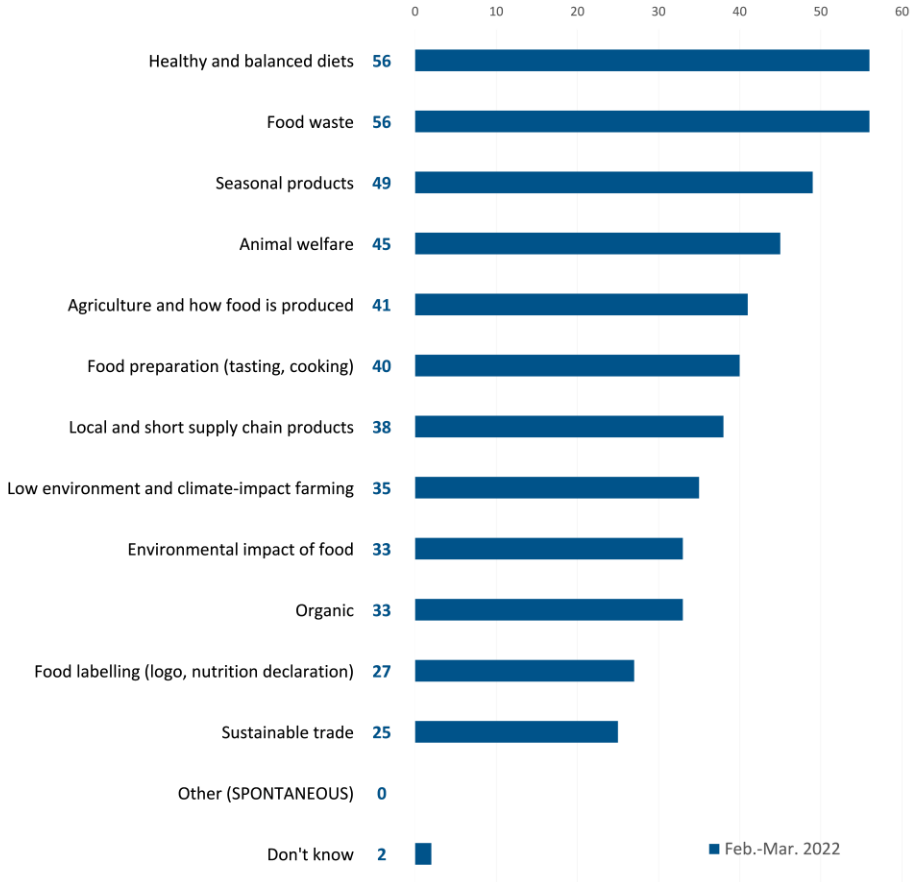
4. Educational objectives of the EU school scheme

Healthy and balanced diets and food waste are the main topics which should be covered by the educational measures in the EU school scheme according to almost six in ten Europeans

Respondents were asked to choose from a list of 12 the topics that should be covered by the educational measures in the EU school scheme[53]:

- More than half of Europeans say that **'healthy and balanced diets'** and **'food waste'** (both 56%) head the list of topics which should be covered by the educational measures in the EU school scheme;
- Around half of respondents mention **'seasonal products'** (49%);
- At least four in ten Europeans include **'animal welfare'** (45%), **'agriculture and how food is produced'** (41%) and **'food preparation (tasting, cooking)'** (40%) among the topics which should be covered in the EU school scheme;
- At least a third of respondents also cite **'local and short supply chain products'** (38%), **'low environment and climate-impact farming'** (35%), **'environmental impact of food'** (33%) and **'organic'** (33%);
- The remaining two topics are cited by at least a quarter of Europeans: **'food labelling (logo, nutrition declaration)'** (27%) and **'sustainable trade** (25%).

QA25 In your opinion, which of the following topics should be covered by the educational measures in the EU school scheme?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



[53] QA25. Currently, the EU school scheme supports educational measures on agriculture and encouraging healthy eating habits. These can include lessons but also farm visits, school gardens, tasting and cooking workshops, theme days and games. In your opinion, which of the following topics should be covered by the educational measures in the EU school scheme? (MULTIPLE ANSWERS POSSIBLE) Agriculture and how food is produced; Healthy and balanced diets; Environmental impact of food; Food labelling (logo, nutrition declaration); Food preparation (tasting, cooking); Local and short supply chain products; Seasonal products; Organic; Low environment and climate-impact farming; Sustainable trade; Animal welfare; Food waste; Other (SPONTANEOUS); Don't know.

Healthy and balanced diets is the most cited topic which should be covered by the educational measures in the EU school scheme in 14 EU Member States, with the highest proportions among respondents in Greece (80%), Cyprus (79%), and Germany and Malta (both 71%).

Food waste is the most common response in 12 EU Member States, with the most mentions in France (73%), the Netherlands (70%), and Portugal and Denmark (both 67%). More than two-thirds of respondents also cite food waste in Malta (68%).

Seasonal products is the most mentioned topic, which should be covered in the EU school scheme in Italy (58%). However, more than six in ten respondents cite seasonal products in France (65%), Greece (64%), and Cyprus (61%).

Agriculture and how food is produced comes in first place in Finland (61%, same score as **food waste**). Six in ten respondents also mention this aspect in Portugal (60%).

None of the eight remaining items heads the list of topics, which should be covered by the educational measures in the EU school scheme in any of the 27 EU Member States. However:

- **Animal welfare** is cited by at least half of respondents in six EU Member States, most notably Greece (61%), Sweden (58%) and Cyprus (57%);
- At least half of respondents mention **food preparation (tasting, cooking)** in nine EU Member States, with the highest scores in Lithuania (54%), the Netherlands (53%), and Germany and Austria (both 52%);
- More than four in ten respondents cite **local and short supply chain products** in seven countries, most notably in Slovenia (56%), Sweden (48%), and Germany (47%);
- At least half of respondents mention **low environment and climate-impact farming** in the Netherlands (52%) and Greece (50%), ahead of Sweden and Portugal (both 45%);
- Half of respondents cite **environmental impact of food** in Greece (50%), and more than four in ten in Cyprus (48%), Portugal (45%), Austria (43%), and Sweden and Malta (both 42%);
- Over half of respondents include **organic** among the topics, which should be covered by the EU school scheme in Greece (57%), Cyprus (56%), and Slovenia (53%);
- **Food labelling (logo, nutrition declaration)** is mentioned by over a third of respondents in Cyprus (45%), Ireland (40%), Malta (35%), and Germany and Austria (both 34%);
- **Sustainable trade** achieves its highest levels in Germany (33%), Ireland (31%), and Austria (30%).

QA25 In your opinion, which of the following topics should be covered by the educational measures in the EU school scheme? (MULTIPLE ANSWERS POSSIBLE)
(%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Healthy and balanced diets	56	46	63	61	53	71	70	60	80	57	48	50	53	79	67	39	45	56	71	60	57	42	48	42	68	58	48	52
Food waste	56	60	39	65	67	62	39	51	54	44	73	31	52	47	33	63	64	49	68	70	61	44	67	34	30	50	61	64
Seasonal products	49	54	45	34	48	48	29	36	64	49	65	44	58	61	27	34	57	38	40	41	53	32	41	29	53	32	28	46
Animal welfare	45	36	31	37	45	55	31	41	61	45	50	31	45	57	19	41	44	27	48	49	53	29	46	31	48	31	38	58
Agriculture and how food is produced	41	38	48	38	45	44	39	39	54	44	37	46	37	55	33	51	30	36	40	57	49	27	60	32	59	34	61	52
Food preparation (tasting, cooking)	40	33	45	38	41	52	44	51	47	32	41	40	27	50	43	54	43	47	48	53	52	25	50	36	51	36	50	29
Local and short supply chain products	38	35	35	34	34	47	36	34	34	33	38	42	43	39	23	33	38	35	25	36	44	30	36	25	56	41	33	48
Low environment and climate-impact farming	35	36	28	30	37	39	30	33	50	35	32	35	38	43	19	34	32	30	39	52	41	19	45	22	43	25	31	45
Environmental impact of food	33	35	26	24	32	37	24	34	50	30	32	32	33	48	20	32	29	28	42	39	43	27	45	24	36	17	28	42
Organic	33	21	38	17	40	36	27	28	57	32	27	28	38	56	34	49	25	23	43	28	41	35	37	30	53	23	18	30
Food labelling (logo, nutrition declaration)	27	22	21	20	27	34	20	40	31	25	22	22	30	45	18	25	16	25	35	26	34	23	29	29	31	24	17	22
Sustainable trade	25	25	18	16	27	33	21	31	24	28	23	18	25	23	9	23	18	24	28	22	30	20	25	20	24	18	22	26
Other (SPONTANEOUS)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Don't know	2	0	2	1	2	1	2	1	0	3	2	0	1	0	2	2	0	1	3	1	2	2	1	2	0	1	1	1

Highest percentage per country
Lowest percentage per country
Highest percentage per item
Lowest percentage per item

The socio-demographic data reveal that **healthy and balanced diets** and **food waste** are the only topics to achieve top ranking in all socio-demographic categories. However:

- Respondents aged 55 and over are much more likely than those aged 15-24 to mention **seasonal products** (51% compared with 42%) and **local and short supply chain products** (40% compared with 33%);
- Europeans who continued in education up to age 20 or beyond are more likely than those who left school at age 15 or earlier to cite **environmental impact of food** (36% compared with 29%) and **food preparation (tasting, cooking)** (43% compared with 37%);
- Self-employed people (44%) and managers (43%) are more likely than house persons (34%) to mention **local and short supply chain products**;
- Respondents who never or almost never have difficulties paying their bills are more likely than those who have such difficulties most of the time to believe that **healthy and balanced diets** (58% compared with 49%) and **local and short supply chain products** (40% compared with 32%) are among the topics that should be covered in the EU school scheme;
- Respondents who live in a large town are more likely than those who live in a rural village to cite **animal welfare** (50% compared with 41%), **healthy and balanced diets** (60% compared with 52%), **organic** (37% compared with 29%) and **environmental impact of food** (37% compared with 29%).

Respondents who believe that agriculture and rural areas are important for the future in the European Union are the most likely to cite all of the 12 topics, most strikingly **healthy and balanced diets** (57%, compared with 35% among those who think that agriculture and rural areas are not important) and **food waste** (57% compared with 36%).

QA25 In your opinion, which of the following topics should be covered by the educational measures in the EU school scheme? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)

	Agriculture and how food is produced	Healthy and balanced diets	Environmental impact of food	Food labelling (logo, nutrition declaration)	Food preparation (tasting, cooking)	Local and short supply chain products	Seasonal products	Organic	Low environment and climate-impact farming	Sustainable trade	Animal welfare	Food waste
EU27	41	56	33	27	40	38	49	33	35	25	45	56
Age												
15-24	36	55	37	27	38	33	42	35	34	28	49	58
25-39	43	56	34	27	39	37	46	33	36	27	45	55
40-54	42	56	34	28	41	40	50	33	35	27	45	55
55 +	42	56	31	27	40	40	51	32	35	23	44	58
Education (End of)												
15-	43	53	29	27	37	36	53	31	34	24	43	56
16-19	39	56	31	27	39	38	48	32	33	24	44	55
20+	45	58	36	28	43	41	50	35	38	27	46	58
Still studying	39	58	40	29	36	35	43	37	38	30	52	61
Socio-professional category												
Self-employed	45	58	36	28	39	44	54	38	41	26	46	51
Managers	44	61	37	27	41	43	48	34	39	29	47	58
Other white collars	40	57	34	28	38	39	47	33	38	27	45	54
Manual workers	40	53	31	27	41	36	46	31	32	26	44	53
House persons	38	54	31	28	34	34	47	32	30	22	42	55
Unemployed	44	53	34	27	45	36	51	33	39	26	48	55
Retired	41	56	29	27	40	39	52	32	33	21	43	60
Students	39	58	40	29	36	35	43	37	38	30	52	61
Difficulties paying bills												
Most of the time	45	49	35	26	42	32	46	28	34	22	43	55
From time to time	41	52	33	28	39	36	49	34	36	26	43	53
Almost never/ Never	41	58	33	27	40	40	49	33	34	25	46	58
Subjective urbanisation												
Rural village	42	52	29	24	38	38	47	29	33	23	41	54
Small/ mid size town	41	56	33	28	39	39	50	33	34	25	45	58
Large town	41	60	37	29	42	37	48	37	39	28	50	57
View on agriculture and rural areas in EU												
Important	42	57	33	28	40	39	49	34	36	26	46	57
Not Important	26	35	24	17	27	22	35	16	22	19	33	36

CONCLUSION

Since 2009, Europeans have strongly believed that agriculture and rural areas are important for the future in the European Union.

Around eight in ten Europeans believe that the EU, through the CAP, fulfils its role in securing, at all times, a stable supply of food in the EU, slightly ahead of providing safe, healthy and sustainable food of high quality.

Almost four in ten believe that agriculture is one of the major causes of climate change. Two-thirds think that EU farmers need to change the way they work to fight climate change even if that means that EU agriculture will be less competitive, while almost six in ten believe that agriculture has already made a major contribution to this. Six in ten Europeans say that they are prepared to pay 10% more for agricultural products that are produced in a way that limits their carbon footprint, a reduction of 6 percentage points since 2020, .

Most think that the level of food security has stayed the same or increased compared with ten years ago both in their own country and in the EU. However, more than half of respondents cite extreme weather events and climate change among the most significant risks to food security in the EU, almost ten-percentage points ahead of natural resource scarcity or degradation.

Europeans are somewhat positive about the quality of services and infrastructure in rural areas in their own countries, with at least half rating six services and infrastructures as good. Conversely, almost six in ten consider that job opportunities are bad in rural areas in their countries.

One in two Europeans believe that providing safe, healthy, and sustainable food of high quality is the main responsibility of farmers in our society.

Concerning the main EU objectives for the CAP,, a large majority (60%) also say that safe, healthy, and sustainable food of high quality should be one of the main objectives;. more than half of respondents cite ensuring reasonable food prices for consumers (55%, +6 percentage points, one of the largest increases since 2020)., just ahead of ensuring a fair standard of living for farmers.

Seven in ten Europeans have heard of the support that the EU gives farmers through the common agricultural policy (CAP), its second highest level of recognition since 2013. However, fewer than one in ten know the details. Slightly more than three-quarters of respondents believe that the CAP benefits all European citizens, not just farmers, the level of support for this view being at its second highest since 2013.

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More than eight in ten Europeans think that the nine priorities of the CAP tested in the survey are important, and at least nine in ten highlight the CAP's role in securing a stable supply of food in the EU at all times, ensuring sustainable management of natural resources and reasonable food prices for consumers, and strengthening the farmer's role in the food chain. In addition, more than half of Europeans agree that the CAP contributes to the nine areas under test, and slightly more than eight in ten agree it helps secure a stable supply of food.

Almost half of Europeans think that the financial support the EU gives to farmers to help stabilise their incomes is about right, while around four in ten believe that this support is too little. More than half of respondents would like to see an increase in this financial support to farmers over the next ten years. In addition, more than nine in ten Europeans are in favour of the EU continuing to make subsidy payments to farmers for carrying out agricultural practices beneficial to the climate and the environment.

More than a third of Europeans consider that one of the main reasons why the EU spends a significant proportion of its budget on the CAP is to guarantee the food supply of Europeans.

Although more than six in ten Europeans consider that trade agreements between the EU and other countries have been positive for both EU agriculture and themselves as consumers of food products, nearly nine in ten think that agricultural imports of any origin should only enter the EU if their production has complied with the EU's environmental and animal welfare standards. Moreover, over half of respondents believe that the EU should have trade barriers to imports of agricultural products except for imports from developing countries.

Almost nine in ten Europeans say that food products being part of a short supply chain is important for their decision to buy them., At least eight in ten hold a similar view about products respecting local tradition and "know-how", coming from a geographical area that they know, and which bear a specific label ensuring quality. Regarding quality labelling, slightly more than six in ten Europeans are aware of the organic farming logo, which has seen a growth of public recognition by 34 percentage points since 2017..

More than nine in ten Europeans believe that organic food products are more expensive than other food products. Meanwhile, around three-quarters believe that they are of better quality and more than four in ten experience difficulties finding them in their home areas.

More than eight in ten Europeans say that neither they personally, nor their children, have specific dietary needs. The main reason for having individual dietary needs is food intolerance.

More than one in 5 Europeans say they have children who benefit from fruits, vegetables, milk and milk products being distributed through the EU school scheme. More than eight in ten consider that fresh fruits and vegetables should be distributed through the EU school scheme, significantly ahead of any other products. In addition, over half of Europeans consider that seasonal products and local and short supply chains are among the most important aspects for the choice of products under the EU school scheme.

Finally, healthy and balanced diets and food waste are the main issues which should be covered by the educational measures in the EU school scheme according to nearly six in ten Europeans, while around half of respondents mention seasonal products.

TECHNICAL SPECIFICATIONS

Between the 21st of February and 21st of March 2022, Kantar carried out wave 97.1 of the EUROBAROMETER survey, at the request of the European Commission, Directorate-General for Communication, “Media monitoring and Eurobarometer” Unit.

Wave 97.1 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and aged 15 years and over.

The basic sample design applied in all countries and territories is a multi-stage, random (probability) one. In each country, a number of sampling points were drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas[54].

In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). If no one answered the interviewer in a household, or if the respondent selected was not available (not present or busy), the interviewer revisited the same household up to three additional times (four contact attempts in total). Interviewers never indicate that the survey is conducted on behalf of the European Commission beforehand; they may give this information once the survey is completed, upon request.

The recruitment phase was slightly different in the Netherlands, Finland, and Sweden. In these countries, a sample of addresses within each areal sampling point (1km2 grid) were selected from the address or population register (in Finland, selection is not done in all sample points, but in some where response rates are expected to improve). The selection of addresses was done in a random manner. Households were then contacted by telephone and recruited to take part in the survey. In the Netherlands a dual frame RDD sample (mobile and landline numbers) are used. The selection of numbers on both frames is done in a random manner with each number getting an equal probability of selection. Unlike Sweden and Finland, the sample is un-clustered.

[54] Urban Rural classification based on DEGURBA (https://ec.europa.eu/eurostat/web/degree-of-urbanisation/background)

	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	PROPORTION EU27
BE	Belgium	Mobiel Centre Market Research	1,033	21/02/2022	14/03/2022	9,915,439	2.53%
BG	Bulgaria	Kantar TNS BBSS	1,035	22/02/2022	14/03/2022	6,094,974	1.55%
CZ	Czechia	Kantar Czechia	1,017	22/02/2022	20/03/2022	9,190,342	2.34%
DK	Denmark	Kantar Gallup	1,024	21/02/2022	20/03/2022	4,994,008	1.27%
DE	Germany	Kantar Deutschland	1,521	22/02/2022	20/03/2022	74,162,306	18.89%
EE	Estonia	Kantar Estonia	1,018	28/02/2022	20/03/2022	1,145,208	0.29%
IE	Ireland	B and A Research	1,004	21/02/2022	21/03/2022	4,039,401	1.03%
EL	Greece	Kantar Greece	1,013	21/02/2022	19/03/2022	9,568,462	2.44%
ES	Spain	TNS Investigación de Mercados y Opinión	1,001	21/02/2022	20/03/2022	42,022,835	10.70%
FR	France	Kantar Public France	1,008	21/02/2022	17/03/2022	57,553,554	14.66%
HR	Croatia	Hendal	1,014	21/02/2022	18/03/2022	3,569,904	0.91%
IT	Italy	Kantar Italia	1,018	22/02/2022	14/03/2022	54,102,101	13.78%
CY	Rep. Of Cyprus	CYMAR Market Research	504	21/02/2022	11/03/2022	759,844	0.19%
LV	Latvia	Kantar TNS Latvia	1,016	21/02/2022	13/03/2022	1,649,459	0.42%
LT	Lithuania	TNS LT	1,003	21/02/2022	20/03/2022	2,445,153	0.62%
LU	Luxembourg	TNS Ilres	505	21/02/2022	11/03/2022	538,288	0.14%
HU	Hungary	Kantar Hoffmann	1,028	21/02/2022	09/03/2022	8,547,786	2.18%
MT	Malta	MISCO International	528	21/02/2022	20/03/2022	455,041	0.12%
NL	Netherlands	Kantar Netherlands	1,015	21/02/2022	14/03/2022	15,067,518	3.84%
AT	Austria	Das Österreichische Gallup Institut	1,012	21/02/2022	19/03/2022	7,844,329	2.00%
PL	Poland	Kantar Polska	1,025	21/02/2022	16/03/2022	32,904,839	8.38%
PT	Portugal	Marktest – Marketing, Organização e Formação	1,006	22/02/2022	20/03/2022	9,221,533	2.35%
RO	Romania	Centrul Pentru Studierea Opiniei si Pietei (CSOP)	1,065	21/02/2022	15/03/2022	16,701,193	4.25%
SI	Slovenia	Mediana DOO	1,012	21/02/2022	14/03/2022	1,834,195	0.47%
SK	Slovakia	Kantar Czechia	1,020	22/02/2022	20/03/2022	4,677,729	1.19%
FI	Finland	Taloustutkimus Oy	1,003	22/02/2022	20/03/2022	4,805,266	1.22%
SE	Sweden	Kantar Sifo	1064	21/02/2022	20/03/2022	8,756,024	2.23%
		TOTAL EU27	26,512	21/02/2022	21/03/2022	392,566,731	100%

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding.

	COUNTRIES	N° OF CAPI INTERVIEWS	N° OF CAWI INTERVIEWS	TOTAL N° INTERVIEWS
BE	Belgium	779	254	1,033
BG	Bulgaria	1,035		1,035
CZ	Czechia	563	454	1,017
DK	Denmark	509	515	1,024
DE	Germany	1,521		1,521
EE	Estonia	504	514	1,018
IE	Ireland	1,004		1,004
EL	Greece	1,013		1,013
ES	Spain	1,001		1,001
FR	France	1,008		1,008
HR	Croatia	1,014		1,014
IT	Italy	1,018		1,018
CY	Rep. Of Cyprus	504		504
LV	Latvia	526	490	1,016
LT	Lithuania	1,003		1,003
LU	Luxembourg	255	250	505
HU	Hungary	1,028		1,028
MT	Malta	338	190	528
NL	Netherlands	1,015		1,015
AT	Austria	1,012		1,012
PL	Poland	1,025		1,025
PT	Portugal	1,006		1,006
RO	Romania	1,065		1,065
SI	Slovenia	701	311	1,012
SK	Slovakia	872	148	1,020
FI	Finland	494	509	1,003
SE	Sweden	517	547	1,064
	TOTAL EU27	22,330	4,182	26,512

CAPI : Computer-Assisted Personal interviewing
CAWI : Computer-Assisted Web interviewing

Consequences of the coronavirus pandemic on fieldwork

Face-to-face interviewing

Where feasible, interviews were conducted face to face in people's homes or on their doorstep and in the appropriate national language. In all countries and territories where face-to-face interviewing was not feasible CAPI (Computer Assisted Personal Interviewing) was used.

For face-to-face all interviews conducted, hygiene and physical distancing measures were respected at all times in line with government regulations, and whenever possible, interviews were conducted outside homes, on doorsteps, in order to stay outside and maintain social distance.

Face-to-face and online interviewing

In Belgium, Czechia, Denmark, Estonia, Latvia, Luxembourg, Malta, Slovenia, Slovakia, Finland and Sweden, face-to-face interviewing was feasible, but it was not possible to reach the target number of face-to-face interviews within the fieldwork period due to the impact of COVID-19 restrictions: many potential respondents are reluctant to open their homes to interviewers, even if they respect hygiene rules and physical distancing, such as wearing masks and using hydroalcoholic gel. Therefore, to hit the target number of interviews within the fieldwork period, additional interviews were conducted online with Computer-Assisted Web Interviewing (CAWI) technique.

Recruitment for online interviews

The online design in each country differed based on what was feasible within the fieldwork period. Where feasible, the online sample was based on a probabilistic sample design. Those recruited to the online survey were recruited through a single mobile frame or dual frame Random Digit Dialling (RDD) design. In this way the entire phone owning population in each country had a non-zero chance of being sampled. The choice of whether to use a single mobile frame or dual frame (mobile and landline) was dependent on the countries' landline infrastructure. Where the landline infrastructure is suitably advanced to support a significant minority of residential households with landline phones a dual frame design is employed. The mix of mobile and landline sample is designed to maximise the representation of the responding sample. The RDD sample for both the mobile and landline sample is drawn from the country's telephone numbering plan. The landline sample frame is stratified by NUTS3 regions based on their prefix and the mobile by operator before a systematic random sample of numbers is generated proportional in size to the total generatable numbers in each stratum. Respondents were recruited using this sample design in Belgium, Czechia, Estonia, Latvia, Luxembourg, Malta and Slovenia.

In Finland, Denmark, and Sweden, RDD samples were not used, instead the telephone sample was drawn from the country telephone directory. In these three countries the telephone directories offer comprehensive coverage of the phone owning population, storing both landline and mobile phone numbers for each individual.

Response rates

For each country a comparison between the responding sample and the universe (i.e. the overall population in the country) is carried out. Weights are used to match the responding sample to the universe on gender by age, region and degree of urbanisation. For European estimates (i.e. EU average), an adjustment is made to the individual country weights, weighting them up or down to reflect their 15+ population as a proportion of the EU 15+ population.

The response rates are calculated by dividing the total number of complete interviews with the number of all the addresses visited, apart from ones that are not eligible but including those where eligibility is unknown. For wave 97.1 of the EUROBAROMETER survey, the response rates for the EU27 countries, calculated by Kantar, are:

	COUNTRIES	CAPI Response rates	CAWI Response rates
BE	Belgium	50.4%	15.8%
BG	Bulgaria	46.3%	
CZ	Czechia	44.5%	30.8%
DK	Denmark	46.8%	17.8%
DE	Germany	22.1%	
EE	Estonia	35.4%	20.7%
IE	Ireland	43.0%	
EL	Greece	28.3%	
ES	Spain	33.9%	
FR	France	32.1%	
HR	Croatia	40.9%	
IT	Italy	42.4%	
CY	Rep. Of Cyprus	43.3%	
LV	Latvia	42.8%	19.4%
LT	Lithuania	42.4%	
LU	Luxembourg	29.0%	46.4%
HU	Hungary	58.8%	
MT	Malta	92.4%	21.3%
NL	Netherlands	73.0%	
AT	Austria	43.6%	
PL	Poland	46.3%	
PT	Portugal	37.4%	
RO	Romania	56.9%	
SI	Slovenia	45.7%	35.3%
SK	Slovakia	62.9%	21.2%
FI	Finland	56.7%	33.1%
SE	Sweden	70.2%	24.7%

CAPI : Computer-Assisted Personal interviewing

CAWI : Computer-Assisted Web interviewing (CAWI RRs do not include the recruitment phase)

Margins of error

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process

(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	**1,4**	**1,9**	**2,2**	**2,5**	**2,7**	**2,8**	**3,0**	**3,0**	**3,1**	**3,1**	**N=1000**
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

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