



Special Eurobarometer 473

Report

Europeans, Agriculture and the CAP

Fieldwork

December 2017

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Survey requested by the European Commission,
Directorate-General for Agriculture and Rural Development and co-ordinated
by the Directorate-General for Communication

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Directorate-General for Agriculture and Rural Development

Survey co-ordinated by the European Commission, Directorate-General for Communication
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INTRODUCTION

Agriculture and the agri-food sector are important in the eyes of Europeans. One of the key policies in this area of the economy is the Common Agricultural Policy (CAP) – a common policy for all Member States of the European Union, funded from the resources of the EU annual budget, of which the CAP constitutes almost 40% of the total budget.

The main aims of the policy are to:

- Ensure a decent standard of living for farmers through income support and market measures;
- Ensure sustainable rural development according to the needs of each Member State.

Significant reforms have been made in recent years to adjust the CAP to the challenges ahead. The last reform of the policy was implemented in 2014 for the period 2014-2020.

With the Communication adopted on "The Future of Food and Farming – for a flexible, fair and sustainable Common Agricultural Policy" on 29th November 2017¹, the European Commission is outlining the ways to ensure that the oldest EU common policy remains future-proof in the period post 2020. It is important to note that this was released just before fieldwork commenced on 2nd December.

The current survey was commissioned by the Directorate-General for Agriculture and Rural Development, to explore public opinion about agriculture, rural areas and the CAP. It follows on from previous surveys on this topic in October 2015², November-December 2013³, May 2011⁴, November 2009⁵ and November-December 2007⁶. It covers the following topics:

- Opinions about the importance of agriculture and rural areas, and how things have changed over the past 10 years;
- The responsibilities of farmers;
- The appropriate level of to deal with agricultural issues (European, national or regional/local);
- What should be the main objectives of agriculture and rural development policies;
- Awareness of the CAP, opinions about how it is performing, and views on its priorities;
- Who benefits most from the CAP;
- Financial support for farmers now and in the future, including justifications for the CAP's budget;
- Factors that influence the purchase of food products, including the role of quality labels;
- Attitudes towards products from organic farming;
- Opinions about international trade in agricultural products including trade barriers and trade agreements.

Where possible, results from the current survey are compared to those of previous surveys on this topic.

¹ https://ec.europa.eu/agriculture/future-cap_en

² <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/SPECIAL/surveyKy/2087>

³ <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/SPECIAL/surveyKy/1081/p/2>

⁴ <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/SPECIAL/surveyKy/996/p/3>

⁵ <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/SPECIAL/surveyKy/777/p/3>

⁶ <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/SPECIAL/surveyKy/629/p/4>

This survey was carried out by the TNS Opinion & Social network in the 28 Member States of the European Union between 2nd and 11th December 2017. 28.031 EU citizens from different social and demographic categories were interviewed face-to-face at home and in their native language on behalf of the Directorate-General for Agriculture and Rural Development.

The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Media monitoring and analysis" Unit). A technical note on the manner in which the interviews were conducted by the institutes within the TNS Opinion & Social network is appended as an annex to this report. Also included are the interview methods and the confidence intervals.

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

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czech Republic	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	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28

* Cyprus as a whole is one of the 28 European Union Member States. However, the "acquis communautaire" has been suspended in the part of the country which is 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 EU28 average.

*We wish to thank the people throughout the European Union
who have given their time to take part in this survey.*

Without their active participation, this study would not have been possible.

EXECUTIVE SUMMARY

A large majority think agriculture and rural areas are important for the future, but there is no clear consensus about whether several aspects of rural life are improving or getting worse

- More than nine in ten (92%) think agriculture and rural areas are important for the future, with 53% saying they are very important.
- At least 85% in every Member State think these are important, and in 19 countries the majority think they are very important. Almost two thirds (64%) say broadband Internet coverage and mobile phone services have improved in rural areas during the last ten years.
- Opinion is divided about access to social, health and cultural services: 34% say this has improved, while 32% say access has become worse.
- There is also a lack of consensus when it comes to social inclusion: 30% think this has improved while 30% say it has got worse in the last ten years.
- Three in ten (30%) think the environment and landscape has improved, but 36% say it has become worse.
- In the case of economic growth and jobs 27% think these have improved, while more than four in ten think they have got worse (43%).
- Opinions about the situation of rural areas compared to 10 years ago vary across countries – sometimes widely.

Providing safe, healthy food of high quality is considered to be the main responsibility of farmers, as well as the main objective for agricultural and rural policy

- The three main responsibilities of farmers are considered to be providing safe, healthy food of high quality (55%), ensuring the welfare of farmed animals (28%), and protecting the environment and tackling climate change (25%).
- Respondents consider the European level is the best decision-making level to ensure agricultural products are of good quality, healthy and safe (51% vs 34% who think this should be managed at a national level), securing food supply (48% vs 37%), and ensuring a fair standard of living for farmers (44% vs 40%). Opinion is divided regarding ensuring reasonable food prices for consumers: 42% think this should be dealt with at a European level, and 42% think this should be dealt with at a national level.
 - At a country level, the proportion of respondents who think each of these issues should be managed at a European level varies, and in some cases a majority prefers decisions to be made at a national level.
- The main objectives of agricultural and rural policy should be providing safe, healthy food of high quality (62%, +6 pp since 2015), protecting the environment and tackling climate change (50%, +6 pp since 2015), and ensuring reasonable food prices for consumers (49%).

Awareness of the CAP is high, and the majority think the CAP is fulfilling its role in a number of areas, and is contributing positively to EU society. There is strong support for the CAP's priorities

- More than two thirds (67%) of respondents have heard of the support the EU gives farmers through the CAP: 10% know the details, while 57% have heard of it but don't really know the details.

- At least half of the respondents in all but one country has heard of the support the EU gives farmers through the CAP.
- Almost three quarters (72%) agree the CAP is fulfilling its role in securing a stable supply of food in the EU, 64% think the CAP is fulfilling its role in providing safe, healthy food of high quality and 62% think the CAP is ensuring a sustainable way to produce food. Almost as many (60%) think the CAP is ensuring reasonable food prices for consumers.
- More than half agree the CAP is protecting the environment and tackling climate change (57%), ensuring a fair standard of living for farmers (56%) and creating growth and jobs in rural areas (52%).
- In terms of the CAP's priorities 88% think strengthening the farmer's role in the food chain is important, 84% think developing research and innovation to support the agri-food sector is important and 84% also think encouraging young people to enter the agricultural sector is important.
- More than two thirds of respondents agree the CAP contributes to the smooth running of the EU Single Market (67%), while 66% agree it contributes by improving trade relations between the EU and the rest of the world, or by boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors. Just over six in ten say the CAP contributes to extending coverage of broadband Internet and communication services in rural areas (62%), while the same proportion (62%) agree the CAP contributes to mitigating the impact of climate change.
- There has been an eight-point increase in the proportion who agree the CAP contributes to extending coverage of broadband Internet and communication services in rural areas, compared to 2015.
- More than six in ten respondents (61%) agree the CAP benefits all European citizens and not only farmers.

The majority think the financial support for farmers is just right or too low, and more than seven in ten want no change or to be increased over the next 10 years

- More than four in ten (45%) think the financial support given to farmers support is about right. Just over one quarter (26%) say it is too low and 11% that it is too high.
- Compared to 2015, respondents are more likely to think the support is about right (+4 pp) and less likely to think it is too low (-3 pp) or too high (-2 pp).
- The main reasons the EU spends a significant proportion of its budget on the CAP are: financial aid to farmers makes it possible to ensure sustainable farming (30%), financial aid to farmers makes it possible to guarantee the food supply of Europeans, or that agriculture requires heavy human and financial investments (both 28%).
- More than four in ten respondents (44%) want to see an increase in EU financial support to farmers over the next 10 years, 12% want to see a decrease while 29% want no change.
- Opinions vary widely between Member States.
- The majority of respondents think it is justified to reduce subsidy payments to farmers who do not respect food safety standards (90%), because environmental standards are not respected (88%) or because animal welfare standards are not respected (88%).
- Almost nine in ten (88%) are in favour of the EU making subsidy payments to farmers for farming practices that are beneficial to the climate and the environment.

Quality labels are an important factor in food purchasing decisions. Organic food products are seen as more expensive, but having better quality, safety, and standards than other food products

- More than three quarters (77%) say a respect for local tradition and “know-how” is an important factor in their decision to buy food products, 76% say having a specific label ensuring quality is important while 75% say coming from a known geographic area is important in their decision to buy food products.
- Of the labels tested, the Fairtrade logo has the highest recognition (37%), followed by organic farming (27%), the protected designation of origin and protected geographical indication logos (both 18%) and the traditional specialty guaranteed logo (15%).
- Awareness of the organic farming logo has increased four points since 2015.
- The presence of quality labels would be an important reason to buy food products for large proportions of the respondents who are aware of each logo: 77% say this about the protected designation of origin logo or the protected geographical indication. Almost three quarters (74%) say the traditional specialty guaranteed would be important while 66% say the organic farming logo would be important.
- Nine in ten (90%) say organic food products are more expensive, 79% agree they are produced with a very restricted use of pesticides, fertilisers or antibiotics and 78% agree they are produced using better environmental practices than other food products. More than three quarters say food products from organic farming respect higher animal welfare standards than other food products (76%). More than seven in ten say food products from organic farming are better quality (72%) and are safer than other food products (70%).
- Four in ten say products from organic farming are difficult to find in the supermarkets, shops or markets in the area where they live (40%).
- The top priorities for agri-food research and innovation are: ensuring supplies of healthy food in the long term (41%), promoting sustainable growth and job creation in rural areas (31%) and providing sustainable solutions to protect plants and animals from diseases and pests (29%).

The majority are in favour of full compliance with EU quality and safety standards for agricultural imports, and consider trade agreements to be positive for EU agriculture and for them as a consumer

- Almost nine in ten (87%) are in favour of agricultural imports from any origin only entering the EU if they fully comply with EU standards in terms of safety and quality.
- More than half (52%) agree the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries.
- Only a minority (39%) agree the EU should have no trade barriers to imports of agricultural products regardless of their origin.
- Almost two thirds (64%) of respondents think trade agreements have been positive for them as consumers.
- Almost six in ten (59%) think trade agreements have been positive for EU agriculture.

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

The first section of the report reviews opinions about the perceived importance of agriculture and rural areas for the future, the status of rural areas compared to ten years ago and the role of farmers. The discussion moves on to consider the preferred institutional level for dealing with issues around agriculture and rural development, and opinions about what should be the main objectives of the EU's agriculture and rural development policy.

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

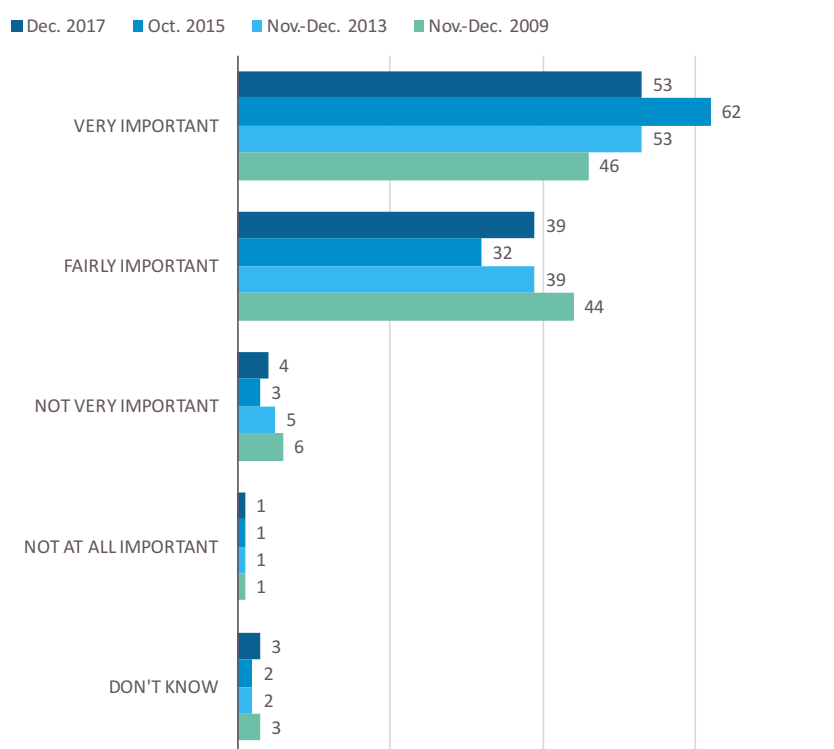
More than nine in ten think agriculture and rural areas are important for the future

Respondents were asked how important they thought agriculture and rural areas are for the future⁷. A large majority (92%) think they are important, with more than half (53%) saying they are very important.

Compared to 2015 there has been a two-percentage point decrease in the proportion who think the agricultural and rural areas are important for the future. However, there has been nine-point decrease in the proportion who think they are very important, and a seven-point increase in the proportion who think they are fairly important.

The proportion who think agriculture and rural areas are important for the future has increased two points since 2009.

QC1 Do you think that, in the EU, agriculture and rural areas are ... for our future?
(% - EU)

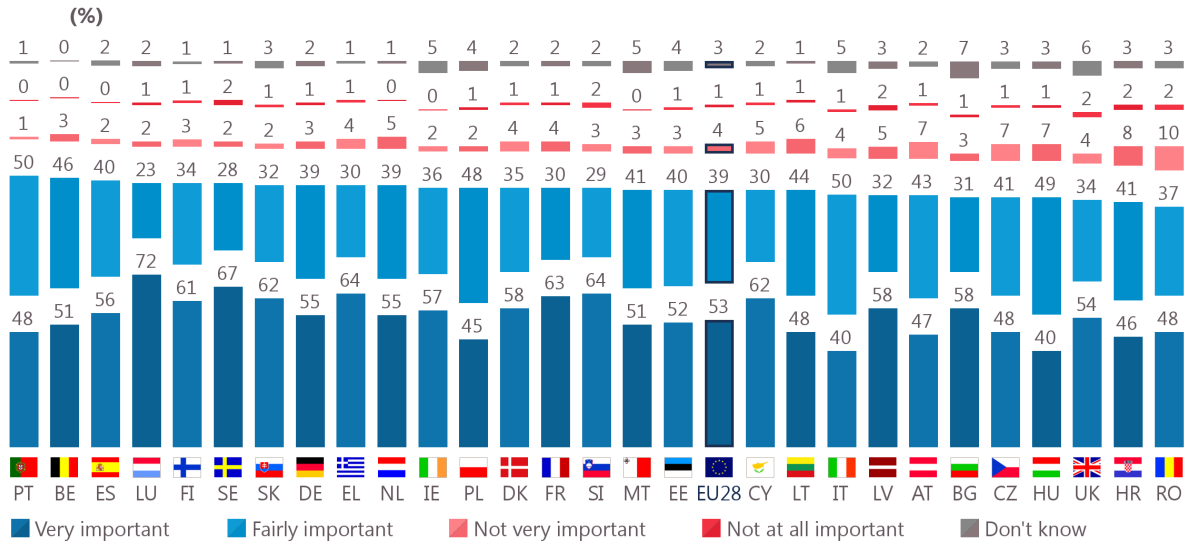


⁷ QC1 Do you think that, in the EU, agriculture and rural areas are ... for our future? Very important, Fairly important, Not very important, Not at all important, Don't know.

A large majority of respondents in each EU Member State think agriculture and rural areas are important for the future. Proportions range from 98% of respondents in Portugal, 97% in Belgium and 96% in Spain to 85% in Romania, 87% in Croatia and 88% in the United Kingdom.

Respondents in Luxembourg (72%), Sweden (67%), Greece and Slovenia (both 64%) are the most likely to say agriculture and rural areas are very important, and this is the view of the majority in 19 Member States.

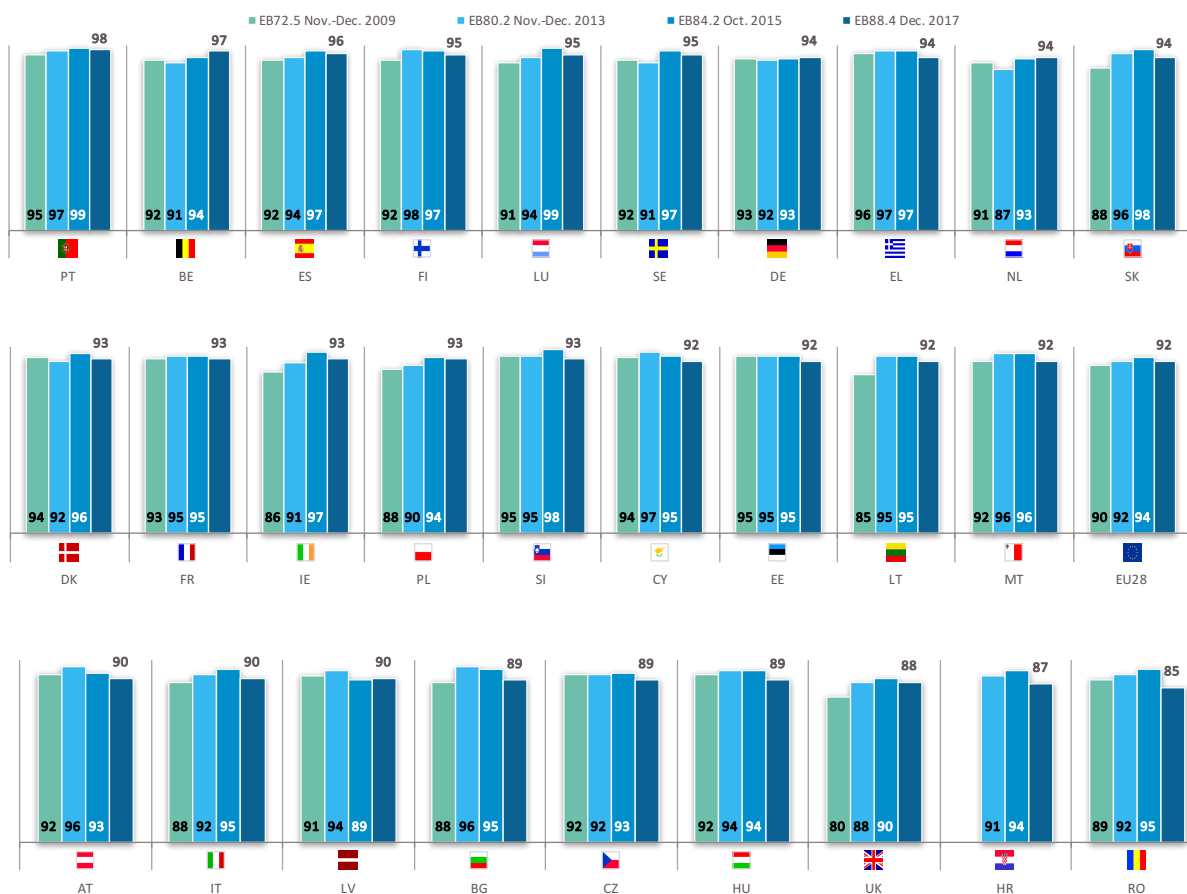
QC1 Do you think that, in the EU, agriculture and rural areas are ... for our future?



Compared to 2015, most countries have either recorded no change, or a slight decline in the proportion who think agriculture and rural areas are important. The largest declines are observed amongst respondents in Romania (-10 pp), Croatia (-7 pp) and Bulgaria (-6 pp). The largest increase is observed amongst those in Belgium (+3 pp).

The longer term trend since 2009 shows that opinion has become more positive in most countries, with the largest increase observed amongst respondents in the United Kingdom (+8 pp).

QC1 Do you think that, in the EU, agriculture and rural areas are ... for our future?
(% - TOTAL 'IMPORTANT')







Given the high proportion of respondents who think agriculture and rural areas are important for the future, it is perhaps not surprising the **socio-demographic analysis** shows few notable differences.

There are, however, more differences between groups when considering the proportions who think these things are very important:

- Respondents aged 25+ are the most likely to say agriculture and rural areas are very important for the future. For example, 56% of those aged 55+ think this way, compared to 44% of 15-24 year olds.
- Respondents who completed their education aged 20+ are the most likely to think these things are very important, particularly compared to those who completed their education aged 15 or younger (59% vs 51%).
- The self-employed (58%) are the most likely to say these things are very important, particularly when compared to students (44%).
- The more rural an area the respondent lives in, the more likely they are to say agriculture and rural areas are very important: 56% living in rural villages think this way, compared to 50% in large towns.

QC1 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	Don't know	Total 'Important'	Total 'Not important'
EU28	53	39	4	1	3	92	5
 Age							
15-24	44	47	5	0	4	91	5
25-39	51	41	4	1	3	92	5
40-54	55	39	3	1	2	94	4
55 +	56	35	4	1	4	91	5
 Education (End of)							
15-	51	38	4	2	5	89	6
16-19	52	40	4	1	3	92	5
20+	59	35	3	1	2	94	4
Still studying	44	48	4	1	3	92	5
 Socio-professional category							
Self-employed	58	35	4	1	2	93	5
Managers	55	39	3	1	2	94	4
Other white collars	51	43	4	0	2	94	4
Manual workers	49	42	5	1	3	91	6
House persons	54	38	3	0	5	92	3
Unemployed	53	37	5	1	4	90	6
Retired	57	34	4	1	4	91	5
Students	44	48	4	1	3	92	5
 Subjective urbanisation							
Rural village	56	36	4	1	3	92	5
Small/ mid-size town	53	39	4	1	3	92	5
Large town	50	42	4	1	3	92	5

2 The situation of rural areas compared to ten years ago

Respondents views about the change in rural areas compared to ten years ago are mixed

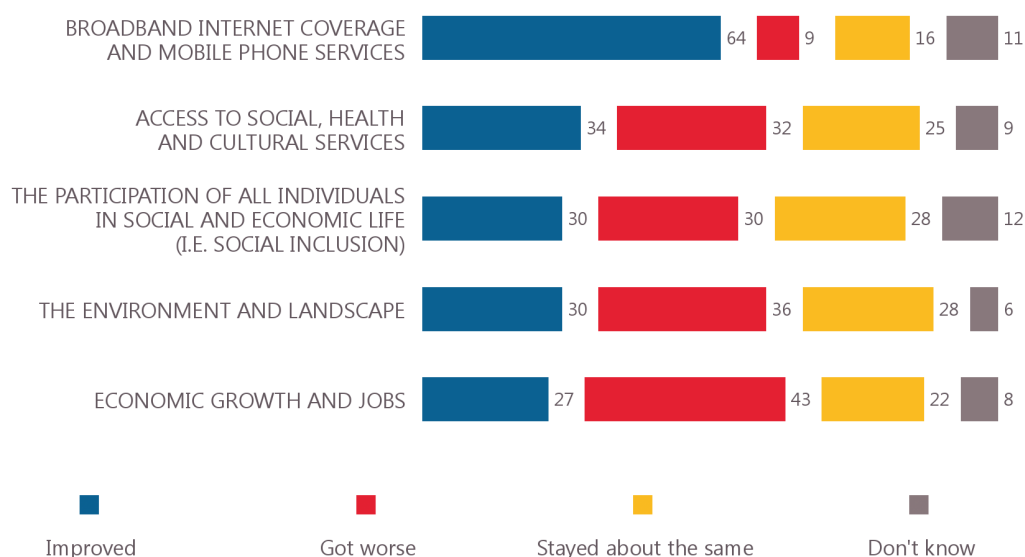
Respondents were asked their opinions about changes in rural areas in their country in the last 10 years⁸. Communications is the area that they consider has seen the most improvement. Almost two thirds say broadband Internet coverage and mobile phone services have improved in the last ten years (64%), with just 9% saying they are now worse. In fact, this is the only area where an absolute majority say things have improved.

Opinion is divided about access to social, health and cultural services: 34% say this has improved, while 32% say access has become worse. There is also a lack of consensus when it comes to social inclusion: 30% think this has improved while 30% say it has got worse in the last ten years. A further 28% say it has remained the same.

Opinions about the environment and the economy tend to be more negative. Three in ten (30%) think the environment and landscape has improved, but 36% say it has become worse. In the case of economic growth and jobs 27% think these have improved, while more than four in ten think they have got worse (43%).

As this is a new question there are no trend results.

QC21 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?
(% - EU)



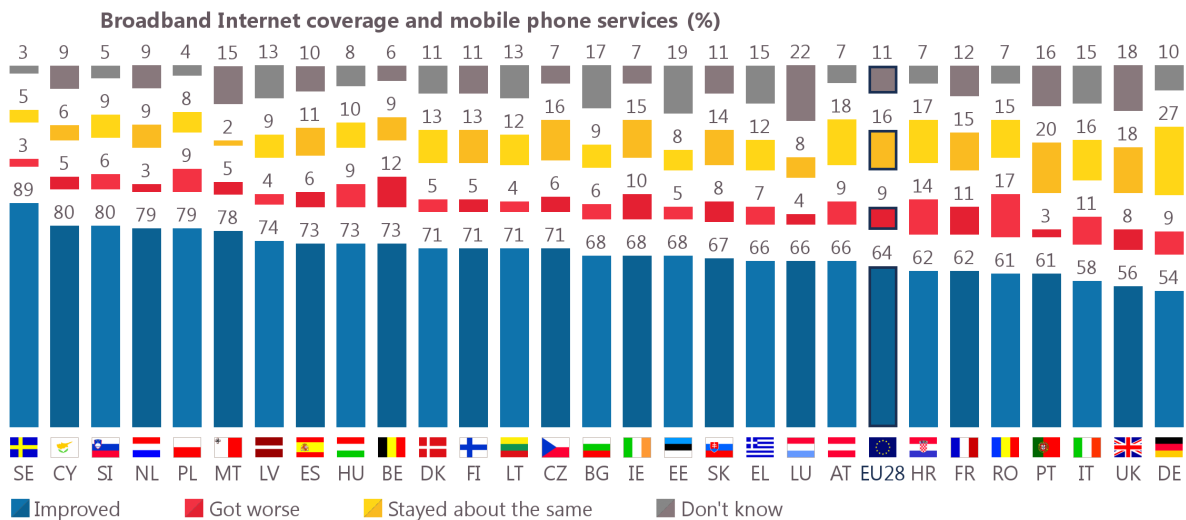
⁸ QC21 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...? Economic growth and jobs; The environment and landscape; Broadband Internet coverage and mobile phone services; Access to social, health and cultural services; The participation of all individuals in social and economic life (i.e. social inclusion). Improved; Got worse; Stayed about the same; Don't know.

A majority of respondents in each Member State think broadband Internet coverage and mobile phone services have improved, with proportions ranging from 89% in Sweden and 80% in Cyprus and Slovenia to 54% in Germany, 56% in the United Kingdom and 58% in Italy.

Respondents in Romania (17%), Croatia (14%) and Belgium (12%) are the most likely to say broadband Internet coverage and mobile phone services in rural areas have got worse in the last ten years. Those in Germany (27%), Portugal (20%), Austria and the United Kingdom (both 18%) are the most likely to say these have stayed the same.

It is worth noting that more than one in five respondents in Luxembourg say they don't know (22%).

QC21.3 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

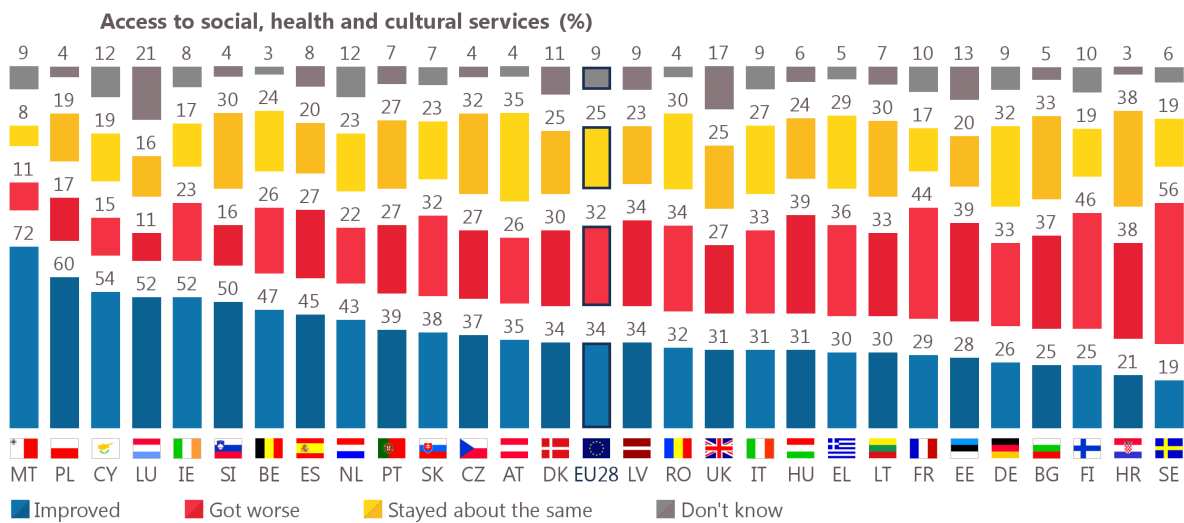


Opinions about access to social, health and cultural services are more diverse. There are only six countries where at least half say these have improved in the last ten years, with those in Malta (72%) much more likely to think this way than those in Poland (60%), Cyprus (54%), Luxembourg, Ireland (both 52%) or Slovenia (50%). At the other end of the scale 19% in Sweden, 21% in Croatia and 25% in Bulgaria and Finland think the same way. Overall there are 14 Member States where respondents are most likely to say the situation has improved.

Respondents in Sweden (56%), Finland (46%) and France (44%) are the most likely to say the situation in these areas has become worse. Those in Croatia (38%), Austria (35%) and Bulgaria (33%) are the most likely to say access to social, health and cultural services has stayed the same.

More than one in five respondents in Luxembourg (21%) say they do not know.

QC21.4 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?



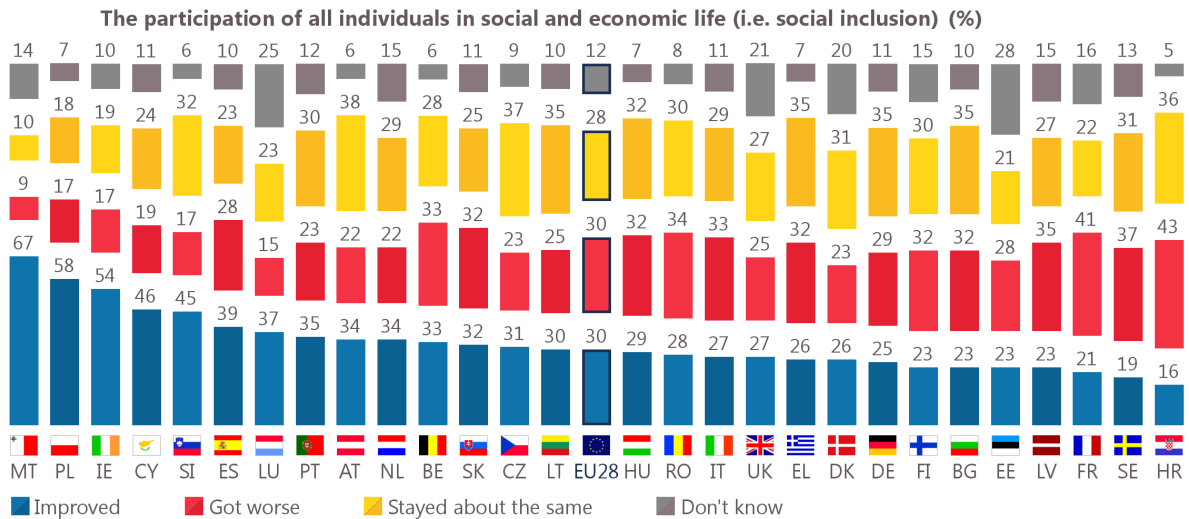
Opinions about social inclusion also vary widely. There are only three countries where at least half think this has improved in the last ten years: Malta (67%), Poland (58%) and Ireland (54%). In contrast, 16% in Croatia, 19% in Sweden and 21% in France think the same way. In nine countries respondents are most likely to say social inclusion in rural areas has improved.

Respondents in Croatia (43%), France (41%) and Sweden (37%) are the most likely to say social inclusion in rural areas has got worse in the last ten years. This is the most common answer in seven countries.

Respondents in Austria (38%), the Czech Republic (37%) and Croatia (36%) are the most likely to say the situation has stayed the same.

At least one in five respondents in Estonia (28%), Luxembourg (25%), the United Kingdom (21%) and Denmark (20%) say they do not know.

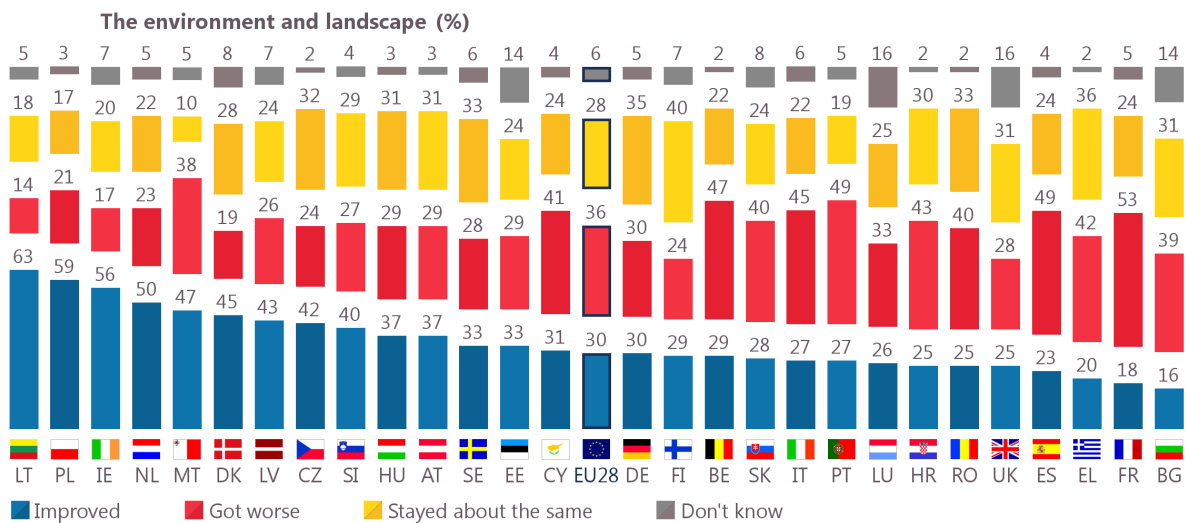
QC21.5 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?



There is a wide range of opinions about the environment and landscape in rural areas compared to ten years ago. Respondents in Lithuania (63%), Poland (59%), and Ireland (56%) are the most likely to say these have improved, compared to 16% in Bulgaria, 18% in France and 20% in Greece.

At least half of all respondents in France (53%) as well as 49% in Spain and Portugal and 47% in Belgium say this has got worse in the last ten years. In fact, in 12 countries this is the most common response. Those in Finland (40%), Greece (36%) and Germany (35%) are the most likely to say the situation has remained about the same.

QC21.2 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

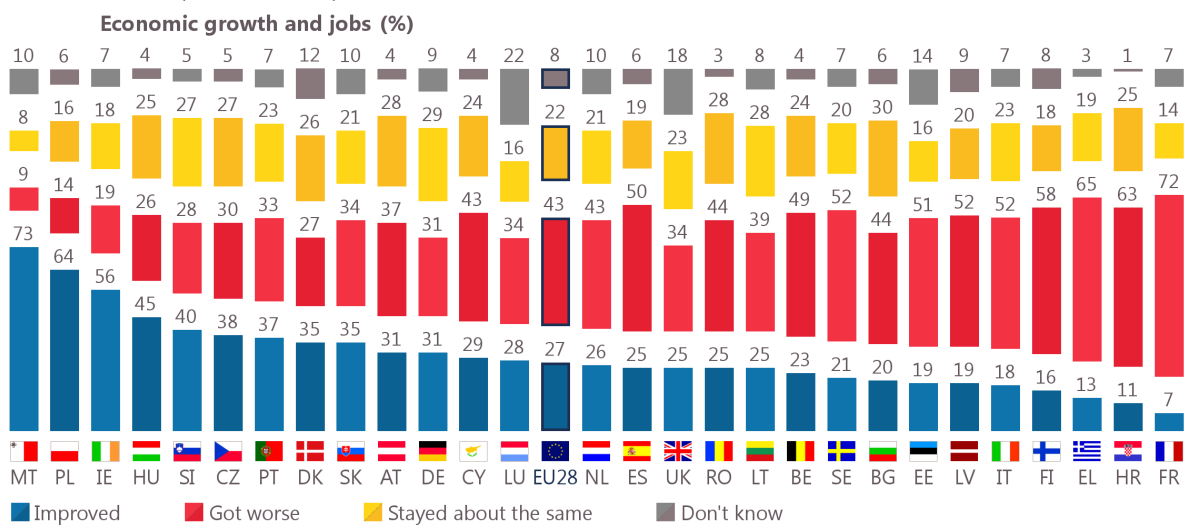


Opinions about economic growth and jobs in rural areas are also highly variable. There are only three countries where at least half of all respondents say these have improved: Malta (73%), Poland (64%) and Ireland (56%). At the other end of the scale 7% in France, 11% in Croatia and 13% in Greece think the same way.

In nine Member States at least half say economic growth and jobs in rural areas in their country have got worse, with those in France (72%), Greece (65%) and Croatia (63%) the most likely to think this way. Respondents in Bulgaria (30%), Germany (29%) and Romania, Austria and Lithuania (all 28%) are the most likely to say the situation in these areas has stayed the same.

More than one in five respondents in Luxembourg say they don't know (22%).

QC21.1 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?







The **socio-demographic analysis** reveals several consistent trends across all options:

- There are no relevant differences based on gender or urbanisation.
- The more financial difficulty a respondent experiences, the more likely they are to say things have got worse. For instance, 43% who experience difficulties paying bills most of the time say social inclusion has got worse, compared to 26% of those with the least difficulties.
- With the exception of economic growth and jobs, respondents who think agriculture and rural areas are not important are more likely to say things have got worse rather than improved. The reverse pattern is true for those who think these areas are important. For example, 41% of those who think agriculture and rural areas are not important say access to social, health and cultural services has got worse, compared to 26% who think it has improved. However, those who think these areas are important are more likely to say things have improved (36% vs 31% got worse).

Other highlights from the socio-demographic analysis include:

- Respondents aged 15-39 are most likely to say **access to social, health and cultural services** and **social inclusion** have improved. For instance, 34% of 15-24 year olds think social inclusion has improved, while 20% say it has got worse. In contrast, 29% of 45-54 year olds think this has improved and 34% think it has got worse.
- Respondents who think EU aid to farmers should decrease are more likely to say **access to social, health and cultural services** and **social inclusion** have got worse, compared to those who think these things have improved.
- Respondents who completed their education aged 15 or younger are more likely to say **access to social, health and cultural services** and **social inclusion** have got worse, while those who stayed in education longer are more likely to say these things have improved. Those who completed education aged 19 or younger are more likely to say the environment and landscape have got worse. Opinion is divided for those who completed education later.
- In the case of **social inclusion**, the self-employed, other white-collar workers and students are more likely to say this has improved. House persons and the unemployed are more likely to say it has got worse. Opinions are more evenly balanced for other occupation groups.

QC21 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?
(% - EU)

	Broadband Internet coverage and mobile phone services		Access to social, health and cultural services		The participation of all individuals in social and economic life (i.e. social inclusion)		The environment and landscape		Economic growth and jobs	
	Improved	Got worse	Improved	Got worse	Improved	Got worse	Improved	Got worse	Improved	Got worse
EU28	64	9	34	32	30	30	30	36	27	43
 Age										
15-24	69	7	42	20	34	20	29	35	31	34
25-39	72	8	39	29	34	29	30	37	29	40
40-54	67	9	32	37	29	34	31	37	27	45
55 +	57	9	31	34	28	30	30	36	24	46
 Education (End of)										
15-	53	9	30	34	25	32	25	40	22	48
16-19	65	9	34	32	30	30	30	37	27	43
20+	70	8	36	32	32	30	34	34	28	43
Still studying	71	5	41	21	35	22	29	33	30	34
 Socio-professional category										
Self-employed	69	8	35	34	33	28	35	35	30	43
Managers	69	8	35	33	31	31	35	33	29	41
Other white collars	71	11	39	31	35	29	31	39	30	43
Manual workers	66	9	35	31	30	30	29	37	28	41
House persons	60	11	34	34	29	32	28	43	24	44
Unemployed	66	9	33	32	26	34	26	39	20	53
Retired	55	8	30	34	27	29	30	35	23	46
Students	71	5	41	21	35	22	29	33	30	34
 Difficulties paying bills										
Most of the time	57	12	24	45	17	43	20	51	14	61
From time to time	64	12	32	35	28	35	25	43	23	50
Almost never/ Never	66	7	37	29	33	26	33	32	30	39
Agriculture and rural areas										
Important	66	8	36	31	31	29	31	36	27	43
Not important	52	18	26	41	21	40	21	45	20	48
EU aid to farmers should...										
Increase	69	8	39	32	34	31	32	39	27	47
Decrease	57	16	26	42	24	37	28	40	25	46
No change	65	8	34	30	30	27	33	31	29	39

3 The responsibilities of farmers in our society

The majority say providing safe, healthy food of high quality is the main responsibility of farmers

Respondents were asked what they thought the two main responsibilities of farmers should be⁹. Providing safe, healthy food of high quality is the only option mentioned by a majority (55%). More than one quarter (28%) mention ensuring the welfare of farmed animals, while 25% say protecting the environment and tackling climate change and 22% mention supplying the population with a diversity of quality products.

Almost one in five think one of the two main responsibilities should be creating jobs and growth in rural areas, or securing a stable supply of food in the EU (both 18%), while 17% mention encouraging and improving life in the countryside.

QC6 What do you think should be the two main responsibilities of farmers in our society? (MAX. 2 ANSWERS)
(% - EU)



⁹ QC6. 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 food supply; Providing safe, healthy 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.

In every country, respondents are most likely to say one of the two main responsibilities of farmers in society is **providing safe, healthy food of high quality**. Respondents in Cyprus (67%), Sweden (65%), the Netherlands and Slovenia (both 64%) are the most likely to say this, compared to 42% in Slovakia and Romania and 43% in Croatia.

Respondents in the Netherlands (49%), Luxembourg (47%) and Sweden (46%) are the most likely to mention **ensuring the welfare of farmed animals**, while those in Hungary (8%), Bulgaria (10%) and Latvia (11%) are the least likely to do so.

Those in Denmark (47%), Cyprus (37%) and Sweden, France and Germany (all 33%) are the most likely to mention **protecting the environment and tackling climate change**, particularly compared to those in Croatia (11%), Bulgaria, Estonia, Slovakia and Portugal (all 13%).






























Supplying the population with a diversity of quality products is mentioned by more than one third of respondents in Bulgaria (35%), Hungary and Slovakia (both 34%). At the other end of the scale 10% in Denmark, 12% in the United Kingdom and 13% in Sweden mention this.

Creating jobs and growth in rural areas is most likely to be considered one of the two main responsibilities of farmers by respondents in Latvia (38%), Bulgaria (34%) and Lithuania (33%). In contrast, 4% in the Netherlands, 7% in Luxembourg and 10% in Slovenia think the same way.

Respondents in Finland (28%), Ireland, Portugal, the United Kingdom, Belgium and Germany (all 24%) are the most likely to mention **securing a stable supply of food in the EU**, while those in Cyprus (7%), Latvia (9%) and Bulgaria (10%) are the least likely to do so.

Finally, respondents in Croatia (39%), Lithuania (35%) and Latvia (32%) are the most likely to say one of the two main responsibilities of farmers is **encouraging and improving life in the countryside**. At the other end of the scale 7% in Luxembourg and Denmark and 8% in the Netherlands and Sweden think the same way.

QC6 What do you think should be the two main responsibilities of farmers in our society?
(MAX. 2 ANSWERS)
(%)

		Providing safe, healthy food of high quality	Ensuring the welfare of farmed animals	Protecting the environment and tackling climate change	Supplying the population with a diversity of quality products	Creating growth and jobs in rural areas	Securing a stable supply of food in the EU	Encouraging and improving life in the countryside	Other (SPONTANEOUS)	Don't know
EU28		55	28	25	22	18	18	17	1	3
BE		62	25	31	27	12	24	12	1	0
BG		52	10	13	35	34	10	29	1	4
CZ		61	28	18	32	12	16	20	0	0
DK		58	41	47	10	12	16	7	1	2
DE		55	33	33	23	11	24	11	0	1
EE		51	12	13	25	32	15	31	1	5
IE		58	29	23	16	23	24	15	0	3
EL		60	21	23	28	24	14	23	2	1
ES		50	18	31	21	32	14	22	1	1
FR		60	34	33	20	14	11	15	1	2
HR		43	13	11	27	30	13	39	0	1
IT		55	30	19	18	25	11	21	1	4
CY		67	22	37	19	18	7	24	0	0
LV		48	11	14	29	38	9	32	1	2
LT		48	15	15	29	33	11	35	0	2
LU		60	47	27	16	7	15	7	2	2
HU		52	8	14	34	27	22	22	1	2
MT		56	26	28	24	12	16	17	1	3
NL		64	49	32	19	4	19	8	0	0
AT		44	33	26	28	17	22	20	0	1
PL		48	14	18	29	18	19	24	1	6
PT		62	24	13	26	20	24	17	0	3
RO		42	17	17	27	28	11	30	3	3
SI		64	19	20	30	10	18	19	2	2
SK		42	20	13	34	24	16	22	2	4
FI		62	38	18	15	13	28	16	1	2
SE		65	46	33	13	11	18	8	0	1
UK		55	37	17	12	14	24	10	0	9

Highest percentage per country

Lowest percentage per country

Highest percentage per item



Lowest percentage per item

The **socio-demographic analysis** highlights few notable differences:

- Women are more likely to say **ensuring the welfare of farmed animals** should be one of the two main responsibilities of farmers (31% vs 26%).
- Those who completed their education aged 20+ are the most likely to mention **protecting the environment and tackling climate change**, or **providing safe, healthy food of high quality**. Those who completed their education aged 15 or younger are the most likely to mention **creating growth and jobs in rural areas**, or **encouraging and improving life in the countryside**. For instance, 23% of those who completed their education aged 15 or younger mention creating growth and jobs in rural areas, compared to 15% of those who completed education aged 20+.

In addition, respondents who think agriculture and rural areas are important are more likely to mention **protecting the environment and tackling climate change**, or **providing safe, healthy food of high quality**, compared to those who think this is not important.

Q66 What do you think should be the two main responsibilities of farmers in our society? (MAX. 2 ANSWERS)
(% - EU)

	Providing safe, healthy food of high quality	Ensuring the welfare of farmed animals	Protecting the environment and tackling climate change	Supplying the population with a diversity of quality products	Creating growth and jobs in rural areas	Securing a stable supply of food in the EU	Encouraging and improving life in the countryside
EU28	55	28	25	22	18	18	17
 Gender							
Man	55	26	26	23	18	20	17
Woman	55	31	24	21	19	16	18
 Education (End of)							
15-	52	26	22	21	23	15	20
16-19	54	28	23	23	19	17	18
20+	59	29	29	22	15	19	14
Still studying	52	33	28	19	16	20	15
Agriculture and rural areas							
Important	56	29	25	22	18	18	17
Not important	42	27	20	19	20	16	18

4 Dealing with issues of agriculture and rural development: preferred institutional level

Respondents are most likely to think issues related to agriculture and rural development policy should be dealt with at the European level

Respondents were asked at what level a range of agricultural and rural development policies should be dealt with^{10,11}. The European level is more likely to be mentioned than the national level when it comes to ensuring that agricultural products are of good quality, healthy and safe (51% vs 34% national level), securing food supply (48% vs 37%), and ensuring a fair standard of living for farmers (44% vs 40%).

Opinion is divided regarding ensuring reasonable food prices for consumers: 42% think this should be dealt with at the European level, and 42% think this should be dealt with at the national level.

For each of these four areas around one in ten think it should be dealt with at the regional or local level.

There has generally been little change in opinion since 2009¹². The most notable is a shift towards national level in the case of securing food supply: there has been a five-point decrease in the proportion who mention the European level, and a four-point increase in the proportion who mention the national level.

QC12 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.
(% - EU)



¹⁰ QC12. For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level. Ensuring a fair standard of living for farmers; Ensuring reasonable food prices for consumers; Securing food supply; Ensuring that agricultural products are of good quality, healthy and safe. European level; National level; Regional or local level; Don't know.

¹¹ The wording option "Securing food supply" has been modified since the previous wave when it was "Securing a stable supply of food in the EU". Trend results should be interpreted with caution given this change.

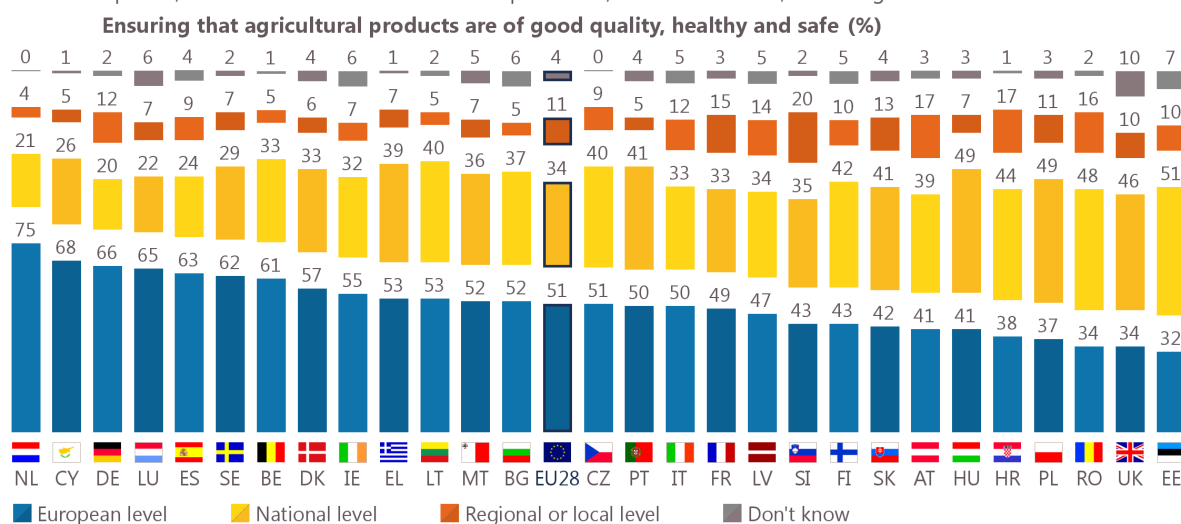
¹² Croatia was not part of the EU at that time so the results for 2007 are based on 27 Member States.

There is a wide range of opinions about the level that is best to deal with ensuring agricultural products are of good quality, healthy and safe. Three quarters of respondents in the Netherlands think this should be dealt with at the European level (75%), as do 68% in Cyprus and 66% in Germany. At the other end of the scale 32% in Estonia and 34% in the United Kingdom and Romania say the same. Overall there are 22 Member States where respondents are most likely to say this should be dealt with at the European level.

In the remaining six countries respondents are most likely to say ensuring agricultural products are of good quality, healthy and safe should be dealt with at the national level. Respondents in Estonia (51%), Poland, Hungary (both 49%) and Romania (48%) are the most likely to think this way.

In 13 Member States at least one in ten think this issue should be dealt with at the regional or local level, with respondents in Slovenia (20%), Croatia and Austria (both 17%) the most likely to say this.

QC12.4 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.

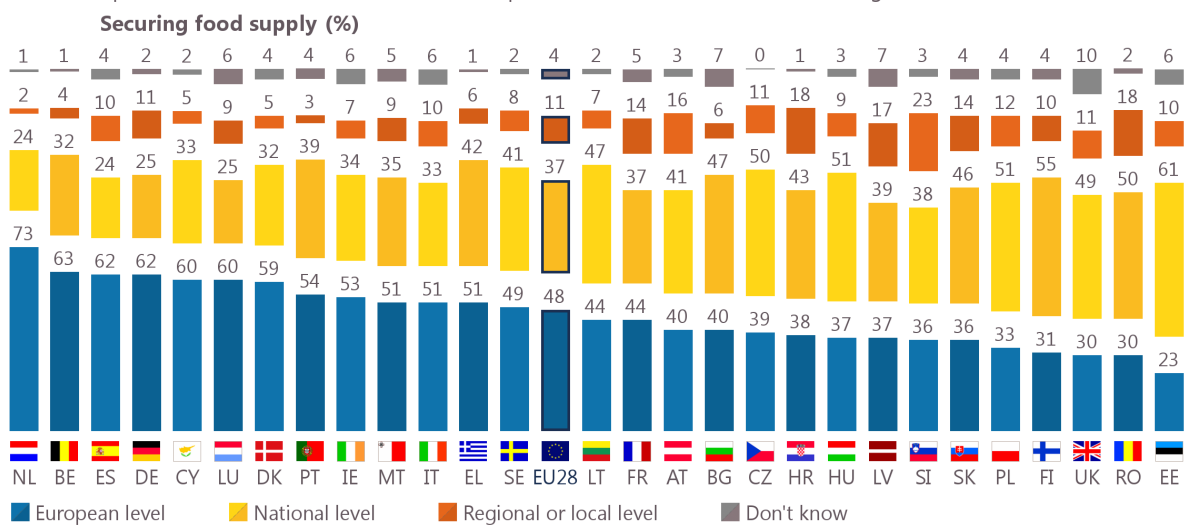


At a country level, opinions about securing food supply are mixed: in 14 countries respondents are most likely to indicate the European level, while in the remaining 14 they are most likely to mention the national level.

Respondents in the Netherlands (73%), Belgium (63%), Spain and Germany (both 62%) are the most likely to think this should be managed at the European level, compared to 23% in Estonia and 30% in Romania and the United Kingdom.

Those in Estonia (61%), Finland (55%), Hungary and Poland (both 51%) are the most likely to nominate the national level to deal with this issue. Respondents in Slovenia (23%), Romania and Croatia (both 18%) are the most likely to say this should be managed at the regional or local level.

QC12.3 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.

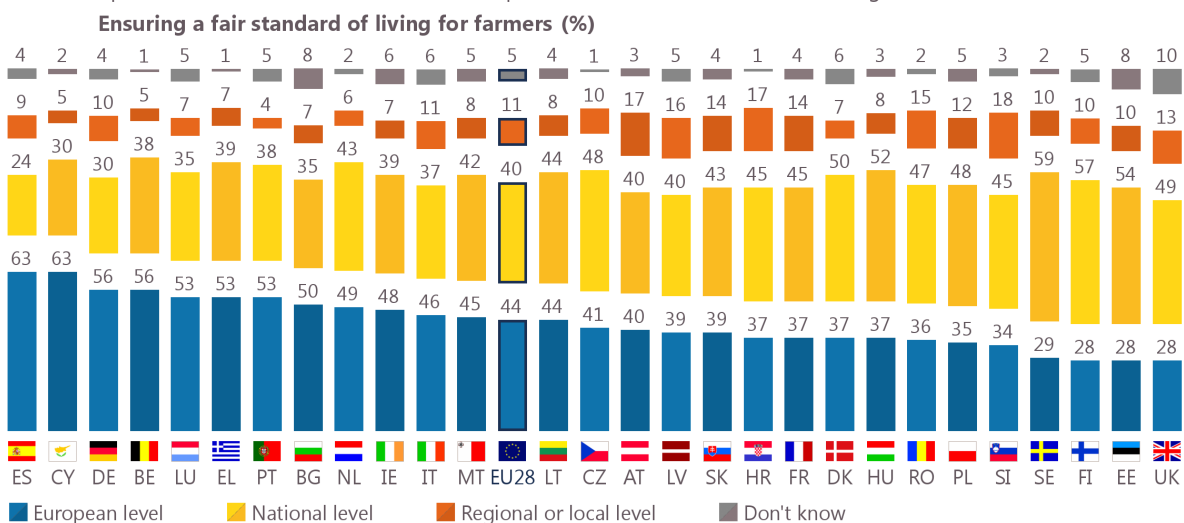


In 12 countries, respondents are most likely to say ensuring a fair standard of living for farmers should be dealt with at a European level, and in eight countries at least half think this way. Respondents in Spain, Cyprus (both 63%), Germany and Belgium (both 56%) are the most likely to think this way, particularly compared to those in the United Kingdom, Estonia and Finland (all 28%).

In another 14 countries respondents are most likely to say this should be dealt with at a national level, with those in Sweden (59%), Finland (57%) and Estonia (54%) the most likely to think this way. In Lithuania and Austria opinion is split between the European and the national level.

Respondents in Slovenia (18%), Croatia and Austria (both 17%) and Latvia (16%) are the most likely to think ensuring a fair standard of living for farmers should be dealt with at a regional or local level.

QC12.1 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.

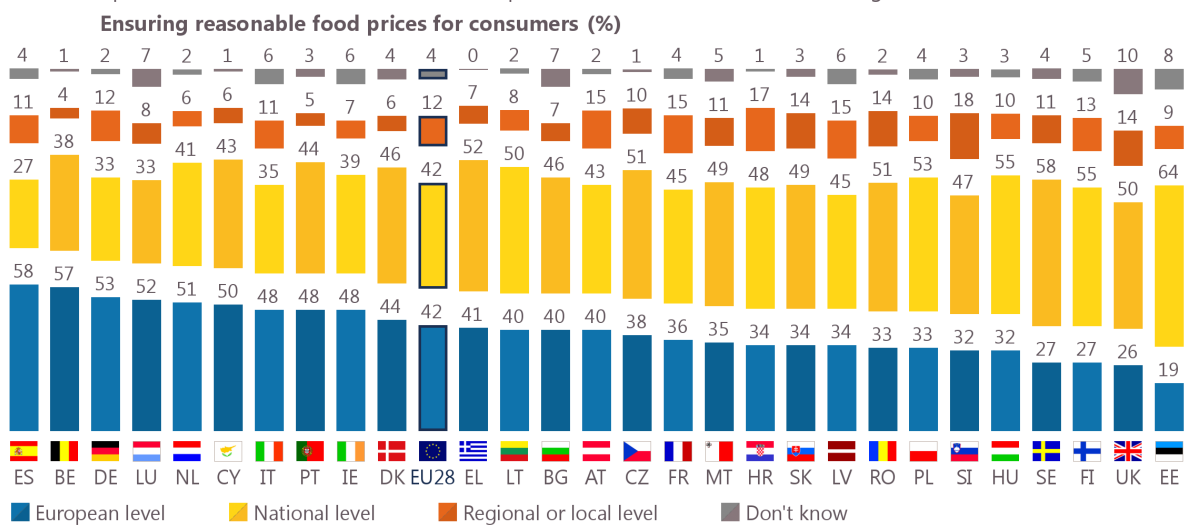


There are only nine countries where respondents are most likely to say ensuring reasonable food prices for consumers should be dealt with at the European level. Respondents in Spain (58%), Belgium (57%) and Germany (53%) are the most likely to say this, while those in Estonia (19%), the United Kingdom (26%), Sweden and Finland (both 27%) are the least likely to do so.

In 19 EU Member States, respondents are most likely to say this issue should be dealt with at the national level, with those in Estonia (64%), Sweden (58%), Finland and Hungary (both 55%) the most likely to think this way.

Respondents in Slovenia (18%), Croatia (17%), Latvia, France and Austria (all 15%) are the most likely to think this should be dealt with at the regional or local level.

QC12.2 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.



The trend table below shows the changes since 2009 in the proportions who think the European level is the most appropriate to deal with each issue.

Respondents in Spain (+15 pp), Lithuania (+11 pp) and Ireland (+10 pp) are now more likely to say **ensuring agricultural products are of good quality, healthy and safe** should be dealt with at the European level. In contrast, respondents in Slovakia (-17 pp), Hungary (-11 pp), Romania, France and Belgium (all -10 pp) are now less likely to think this way. Overall there are 12 countries where respondents are more likely to think this should be dealt with at the EU level, and 14 where they are now less likely to think this way. There has been no change in opinion in Slovenia.






























Respondents in Spain (+13 pp) and Lithuania (+8 pp) are now more likely to think **securing food supply** should be dealt with at the European level. However, in a number of countries there have been large declines in the proportions who think this way, most notably in Estonia (-37 pp), Bulgaria, Slovenia (both -32 pp) and Romania (-30 pp). Overall, there are 19 countries where respondents are now less likely to think this should be dealt with at the European level.

In Spain (+16 pp) and Malta (+12 pp) respondents are now more likely to think **ensuring a fair standard of living for farmers** should be dealt with at the European level. In contrast, those in Slovakia (-15 pp), the Netherlands, France (both -12 pp) and Sweden (-10 pp) are now less likely to think this way. In fact, in 16 countries respondents are less likely to think this should be dealt with at the European level, compared to 2009.

Respondents in 12 countries are now more likely to think **ensuring reasonable food prices for consumers** should be dealt with at the European level, with the largest increases observed in Spain (+12 pp) and Lithuania (+11 pp). In a further 13 countries respondents are now less likely to think this way, most notably those in Luxembourg (-18 pp), the Netherlands (-13 pp) and France (-12 pp).

Some broader country trends also emerge. Respondents in Spain, Latvia and Lithuania are now more likely to be in favour of each of these issues being dealt with at the European level. In contrast, those in the Czech Republic, Greece, France, Luxembourg, Hungary, the Netherlands and Slovakia are now less likely to be in favour of each issue being dealt with at the European level.

QC12 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.
(% - EUROPEAN LEVEL)

		Ensuring that agricultural products are of good quality, healthy and safe		Securing food supply		Ensuring a fair standard of living for farmers		Ensuring reasonable food prices for consumers	
		2017	2017 - 2009	2017	2017 - 2009	2017	2017 - 2009	2017	2017 - 2009
EU28		51	=	48	▼ 5	44	▼ 1	42	=
BE		61	▼ 10	63	▼ 6	56	▼ 7	57	▼ 6
BG		52	▲ 3	40	▼ 32	50	▲ 2	40	▲ 8
CZ		51	▼ 8	39	▼ 3	41	▼ 6	38	▼ 3
DK		57	▲ 7	59	▲ 1	37	▼ 9	44	▼ 2
DE		66	▲ 3	62	▼ 13	56	▲ 3	53	▲ 1
EE		32	▼ 1	23	▼ 37	28	▼ 1	19	=
IE		55	▲ 10	53	▼ 7	48	▲ 7	48	▲ 9
EL		53	▼ 3	51	▼ 8	53	▼ 6	41	▼ 9
ES		63	▲ 15	62	▲ 13	63	▲ 16	58	▲ 12
FR		49	▼ 10	44	▼ 7	37	▼ 12	36	▼ 12
HR		38	N.A	38	N.A	37	N.A	34	N.A
IT		50	▲ 1	51	▼ 4	46	▼ 1	48	▲ 4
CY		68	▼ 5	60	▼ 21	63	▲ 6	50	▼ 5
LV		47	▲ 9	37	▲ 5	39	▲ 3	34	▲ 6
LT		53	▲ 11	44	▲ 8	44	▲ 2	40	▲ 11
LU		65	▼ 7	60	▼ 15	53	▼ 7	52	▼ 18
HU		41	▼ 11	37	▼ 7	37	▼ 5	32	▼ 1
MT		52	▲ 6	51	▼ 20	45	▲ 12	35	▲ 8
NL		75	▼ 3	73	▼ 2	49	▼ 12	51	▼ 13
AT		41	▼ 1	40	▲ 1	40	▼ 3	40	▲ 1
PL		37	▼ 4	33	▼ 3	35	▼ 3	33	▲ 2
PT		50	▼ 1	54	▲ 2	53	▲ 5	48	=
RO		34	▼ 10	30	▼ 30	36	▼ 1	33	▲ 4
SI		43	=	36	▼ 32	34	▼ 2	32	▼ 4
SK		42	▼ 17	36	▼ 12	39	▼ 15	34	▼ 11
FI		43	▲ 7	31	▼ 1	28	=	27	▼ 3
SE		62	▲ 7	49	▲ 1	29	▼ 10	27	▼ 6
UK		34	▲ 4	30	=	28	▲ 2	26	▲ 3

A number of consistent themes emerge from the **socio-demographic analysis**.

- Although respondents of each age group are consistently more likely to say each issue should be dealt with at the European level rather than at the national level, the pattern for those aged 55+ is less clear-cut: while they are more likely to indicate the European level for **ensuring that agricultural products are of good quality, healthy and safe** and **securing food supply**, they are slightly more likely to indicate the national level for **ensuring reasonable food prices for consumers** and **ensuring a fair standard of living for farmers**.
- The longer a respondent remained in education, the more likely they are to say **securing food supply** and **ensuring agricultural products are of good quality, healthy and safe** should be dealt with at the European level. For example, 57% of those who completed education aged 20+ think **ensuring that agricultural products are of good quality, healthy and safe** should be dealt with at the European level, compared to 44% of those who completed education aged 15+.
- With the exception of **ensuring that agricultural products are of good quality, healthy and safe**, respondents who place themselves on the left or in the centre of the political scale are more likely to be in favour of these things being dealt with at the European level than those on the right. For example, respondents who place themselves on the left or in the centre are most likely to think **ensuring reasonable food prices for consumers** should be dealt with at the European level, while those on the right are most likely to say the national level.
- Respondents who think agriculture and rural areas are important for the future are most likely to say **each** issue should be dealt with at the European level, while those who say these are not important are most likely to favour the national level in each case.

QC12 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.
(% - EU)

	Ensuring that agricultural products are of good quality, healthy and safe		Securing food supply		Ensuring a fair standard of living for farmers		Ensuring reasonable food prices for consumers	
	European level	National level	European level	National level	European level	National level	European level	National level
EU28	51	34	48	37	44	40	42	42
 Age								
15-24	54	31	50	35	46	38	44	40
25-39	54	32	51	35	46	38	43	41
40-54	51	35	49	37	45	42	44	42
55 +	48	36	44	39	41	42	39	44
 Education (End of)								
15-	44	37	43	37	43	37	40	40
16-19	49	36	46	39	44	41	42	44
20+	57	31	53	35	44	42	43	42
Still studying	56	29	54	33	47	37	44	40
 Left-right political scale								
Left	56	31	53	34	48	39	45	40
Centre	54	33	50	36	47	39	45	41
Right	48	40	44	46	39	48	38	50
 Agriculture and rural areas								
Important	53	34	49	37	46	40	43	42
Not important	34	46	30	48	29	47	28	51

5 Main objectives of the EU in terms of agriculture and rural development policy

Ensuring agricultural products are of good quality, healthy and safe should be the main objective of the EU in terms of agricultural and rural policy

Respondents were asked what they thought the main objectives of the EU's agriculture and rural policy should be¹³. More than six in ten say one of the main objectives should be providing safe, healthy food of high quality (62%). The only other area mentioned by at least half is protecting the environment and tackling climate change (50%), although 49% mention ensuring reasonable food prices for consumers and 48% mention ensuring a fair standard of living for farmers. More than four in ten also mention ensuring a sustainable way to produce food (46%) and creating growth and jobs in rural areas (45%). Almost four in ten mentions securing a stable supply of food in the EU (38%).

Providing safe, healthy, high quality food and protecting the environment are not only key policy areas for Europeans: as seen in a previous section they are considered by many to be key responsibilities for farmers.

Compared to 2015, there has been a six-point increase in the proportion of respondents that mention providing safe, healthy food of high quality¹⁴, and a six-point increase in the proportion who mention protecting the environment and tackling climate change. There has also been a three-point increase in the proportion who mention ensuring a sustainable way to produce food. There have been slight (1-2 pp) declines in the other items since 2015.

QC4 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)
































¹³ QC4 In your opinion, which of the following should be the main objectives of the EU in terms of agriculture and rural development policy? Ensuring that agricultural products are of good quality, healthy and safe; Developing rural areas while preserving the countryside; Ensuring reasonable food prices for consumers; Protecting the environment and tackling climate change; Ensuring a sustainable way to produce food; Securing a stable supply of food in the EU; Ensuring a fair standard of living for farmers; Other (SPONTANEOUS); Don't know.

¹⁵ The wording of the option "Providing safe, healthy food of high quality" has changed since the previous survey when it was "Ensuring agricultural products are of good quality, healthy and safe". Trends for this item should therefore be interpreted with caution.

In 24 countries providing safe, healthy food of high quality is the most mentioned objective. In Lithuania and Croatia respondents are most likely to mention ensuring reasonable food prices for consumers, and in one country creating growth and jobs in rural areas. In Greece providing safe, healthy food of high quality and ensuring reasonable food prices for consumers are equally mentioned, while in Latvia providing safe, healthy food of high quality and creating growth and jobs in rural areas are equally mentioned.

QC4 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)
(%)

		Providing safe, healthy food of high quality	Protecting the environment and tackling climate change	Ensuring reasonable food prices for consumers	Ensuring a fair standard of living for farmers	Ensuring a sustainable way to produce food	Creating growth and jobs in rural areas*	Securing a stable supply of food in the EU	Other (SPONTANEOUS)	Don't know
EU28		62	50	49	48	46	45	38	38	38
BE		67	52	54	55	53	34	41	41	41
BG		66	36	56	48	36	54	33	33	33
CZ		66	45	63	45	45	41	39	39	39
DK		74	69	48	45	69	46	47	47	47
DE		68	59	49	50	54	37	50	50	50
EE		70	49	60	48	53	64	44	44	44
IE		57	42	48	48	46	48	41	41	41
EL		69	52	69	54	45	57	38	38	38
ES		57	53	49	56	46	60	38	38	38
FR		71	65	51	69	47	48	35	35	35
HR		50	30	51	41	37	46	32	32	32
IT		58	43	41	30	37	43	24	24	24
CY		74	64	62	49	48	60	35	35	35
LV		62	35	54	47	38	62	33	33	33
LT		56	42	61	43	33	60	37	37	37
LU		61	54	41	55	43	36	39	39	39
HU		55	34	51	32	34	41	35	35	35
MT		63	49	51	46	44	39	38	38	38
NL		79	72	45	51	70	32	51	51	51
AT		64	53	50	52	50	45	47	47	47
PL		50	35	49	35	33	35	33	33	33
PT		70	46	61	51	51	55	44	44	44
RO		56	39	50	48	34	55	33	33	33
SI		68	42	56	42	44	42	41	41	41
SK		58	39	53	42	43	47	41	41	41
FI		75	53	55	65	59	50	59	59	59
SE		84	79	45	65	74	59	57	57	57
UK		48	38	41	39	42	40	34	34	34
Highest percentage per country		Lowest percentage per								
Highest percentage per item		Lowest percentage per item								

At least half of the respondents in all but one EU Member States think **providing safe, healthy food of high quality** should be one of the main policy objectives. Proportions range from 84% in Sweden, 79% in the Netherlands and 75% in Finland to 48% in the United Kingdom and 50% in Poland and Croatia.

There is greater diversity in opinion when it comes to **protecting the environment and tackling climate change**. More than two thirds in Sweden (79%), the Netherlands (72%) and Denmark (69%) think this should be one of the main policy objectives, compared to 30% in Croatia, 34% in Hungary and 35% in Poland and Latvia.

There is less variation when it comes to **ensuring reasonable food prices for consumers**. Respondents in Greece (69%), the Czech Republic (63%) and Cyprus (62%) are the most likely to mention this, compared to 41% in the United Kingdom, Italy and Luxembourg.

Respondents in France (69%), Finland and Sweden (both 65%) are the most likely to say one of the main objectives should be **ensuring a fair standard of living for farmers**. This compares to 30% in Italy, 32% in Hungary and 35% in Poland.

More than two thirds of respondents in Sweden (74%), the Netherlands (70%) and Denmark (69%) think that **ensuring a sustainable way to produce food** should be a main objective. At the other end of the scale 33% in Poland and Lithuania and 34% in Hungary and Romania think the same way.

Creating growth and jobs in rural areas is most likely to be mentioned by those in Estonia (64%), Latvia (62%). Cyprus, Spain and Lithuania (all 60%), and least likely to be mentioned by those in the Netherlands (32%), Belgium (34%) and Poland (35%).

Finland (59%), Sweden (57%), the Netherlands (51%) and Germany (50%) are the only countries where at least half mention **securing a stable supply of food in the EU**. This compares to 24% in Italy, 32% in Croatia, and 33% in Bulgaria, Latvia, Poland and Romania.

Compared to 2015, respondents in Sweden (+16 pp), Finland (+13 pp), Estonia and Germany (both +11 pp) are now more likely to say that **providing safe, healthy food of high quality** should be one of the main objectives of agricultural and rural development policy. In fact, in 20 countries respondents are now more likely to think this way. At the other end of the scale, respondents in Lithuania (-11 pp) and Luxembourg (-10 pp) are now less likely to say this.

In 21 countries respondents are now more likely to think that **protecting the environment and tackling climate change** should be one of the main objectives, with the largest changes observed in the Netherlands (+22 pp), France (+16 pp), Cyprus (+15 pp). The largest decline, on the other hand, is observed amongst respondents in Malta (-11 pp).






























Changes in opinion about **ensuring reasonable food prices for consumers** are generally smaller. The largest increases are seen amongst those in Sweden (+12 pp), and the largest declines amongst respondents in Luxembourg (-13 pp) and Spain (-12 pp).

In 17 countries, respondents are now less likely to say that **ensuring a fair standard of living for farmers** should be one of the main objectives, and this is particularly the case in Malta, the United Kingdom (both -15 pp) and Romania (-11 pp). The reverse trend is true in Sweden (+12 pp).

Respondents in France (+12 pp), Sweden and the Netherlands (both +11 pp) are now more likely to say that **ensuring a sustainable way to produce food** should be a main objective, while those in Malta are now less likely to do so (-10 pp).

Finally, in 19 countries respondents are now less likely to think that **securing a stable supply of food in the EU** should be a main objective, with the largest decreases seen amongst those in Luxembourg (-16 pp) and Malta (-10 pp). The largest increases, on the other hand, are observed amongst those in Latvia and Bulgaria (both +8 pp).

QC4 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)
(%)

		Providing safe, healthy food of high quality	2017 - 2015	Protecting the environment and tackling climate change	2017 - 2015	Ensuring reasonable food prices for consumers	2017 - 2015	Ensuring a fair standard of living for farmers	2017 - 2015	Ensuring a sustainable way to produce food	2017 - 2015	Creating growth and jobs in rural areas*	Securing a stable supply of food in the EU	2017 - 2015
EU28		62	▲ 6	50	▲ 6	49	▼ 2	48	▼ 1	46	▲ 3	45	38	▼ 2
BE		67	▲ 6	52	▲ 6	54	▲ 2	55	▼ 7	53	▲ 7	34	41	▼ 1
BG		66	▲ 10	36	▲ 8	56	▲ 1	48	▲ 5	36	▲ 7	54	33	▲ 8
CZ		66	▲ 5	45	▲ 4	63	▲ 3	45	▲ 3	45	▼ 3	41	39	▼ 1
DK		74	▲ 7	69	▲ 12	48	▼ 3	45	▲ 3	69	▲ 8	46	47	▲ 6
DE		68	▲ 11	59	▲ 12	49	▼ 3	50	▼ 1	54	▲ 5	37	50	▼ 6
EE		70	▲ 11	49	▲ 14	60	▲ 3	48	▼ 3	53	▼ 1	64	44	▲ 2
IE		57	▲ 9	42	▲ 2	48	▼ 6	48	▼ 8	46	▲ 1	48	41	▼ 3
EL		69	=	52	▲ 2	69	▼ 5	54	▼ 4	45	▼ 3	57	38	▼ 5
ES		57	=	53	▲ 6	49	▼ 12	56	▼ 6	46	▲ 1	60	38	▲ 1
FR		71	▼ 1	65	▲ 16	51	▼ 1	69	▲ 6	47	▲ 12	48	35	▲ 6
HR		50	▲ 7	30	▼ 3	51	▼ 2	41	▼ 4	37	▼ 6	46	32	▼ 8
IT		58	▲ 8	43	=	41	▼ 3	30	▲ 5	37	▲ 3	43	24	▼ 1
CY		74	▲ 9	64	▲ 15	62	▼ 3	49	▼ 6	48	▲ 2	60	35	▲ 4
LV		62	▲ 8	35	▲ 3	54	▲ 7	47	▲ 3	38	▲ 4	62	33	▲ 8
LT		56	▼ 11	42	▲ 6	61	▲ 7	43	▼ 3	33	▲ 2	60	37	▲ 4
LU		61	▼ 10	54	▲ 2	41	▼ 13	55	▼ 5	43	=	36	39	▼ 16
HU		55	▼ 1	34	▼ 1	51	▼ 3	32	▼ 4	34	▼ 1	41	35	▼ 1
MT		63	▼ 8	49	▼ 11	51	▼ 8	46	▼ 15	44	▼ 10	39	38	▼ 10
NL		79	▲ 7	72	▲ 22	45	▲ 4	51	▲ 4	70	▲ 11	32	51	▼ 3
AT		64	▲ 3	53	▼ 3	50	▼ 4	52	▼ 1	50	▼ 3	45	47	▼ 8
PL		50	▲ 9	35	▲ 3	49	▼ 4	35	▲ 2	33	▼ 3	35	33	▼ 7
PT		70	▲ 10	46	▲ 6	61	▲ 4	51	▲ 5	51	▲ 2	55	44	▼ 6
RO		56	▲ 3	39	▼ 5	50	▼ 3	48	▼ 11	34	▼ 5	55	33	▼ 4
SI		68	▲ 3	42	▲ 5	56	▲ 3	42	▼ 4	44	▲ 4	42	41	▼ 5
SK		58	=	39	▲ 2	53	▼ 9	42	▼ 6	43	▼ 1	47	41	▼ 3
FI		75	▲ 13	53	▲ 13	55	▲ 1	65	▲ 6	59	▲ 9	50	59	▼ 3
SE		84	▲ 16	79	▲ 13	45	▲ 12	65	▲ 12	74	▲ 11	59	57	▲ 6
UK		48	▲ 5	38	▼ 2	41	▲ 2	39	▼ 15	42	▼ 1	40	34	▼ 5




The **socio-demographic analysis** illustrates relatively few differences in core demographic groups:

- The older the respondent, the more likely they are to say that **ensuring reasonable food prices for consumers** should be one of the main objectives: 51% of those aged 55+ say this, compared to 45% of those aged 15-24.
- The longer a respondent remained in education, the more likely they are to say that **ensuring a fair standard of living for farmers, securing a stable supply of food in the EU, ensuring a sustainable way to produce food, protecting the environment and tackling climate change**, and **providing safe, healthy food of high quality** should be main objectives of policy.
- Managers are more likely than other occupation groups to say that **ensuring a sustainable way to produce food** or **protecting the environment and tackling climate change** should be main policy objectives. For example, 58% of managers say this about protecting the environment and tackling climate change, compared to 43% of manual workers.

In addition, respondents who think agriculture and rural areas are important to the future are more likely to think each area should be a main policy objective, and this is particularly the case for providing safe, healthy food of high quality (64% vs 42% who say agriculture and rural areas are not important).

Finally, respondents who think EU aid to farmers should increase are more likely to say that **ensuring a fair standard of living for farmers, creating growth and jobs in rural areas** and **ensuring reasonable food prices for consumers** should be main objectives, compared to those who think aid should decrease.

QC4 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)

	Providing safe, healthy food of high quality	Protecting the environment and tackling climate change	Ensuring reasonable food prices for consumers	Ensuring a fair standard of living for farmers	Ensuring a sustainable way to produce food	Creating growth and jobs in rural areas	Securing a stable supply of food in the EU
EU28	62	50	49	48	46	45	38
 Age							
15-24	59	49	45	43	44	43	34
25-39	62	50	47	48	46	44	36
40-54	63	52	49	50	49	46	41
55 +	62	49	51	48	44	45	39
 Education (End of)							
15-	57	42	50	44	37	45	33
16-19	60	47	50	46	43	44	37
20+	67	60	49	54	55	46	44
Still studying	64	53	42	44	47	43	37
 Socio-professional category							
Self-employed	63	55	47	49	52	44	38
Managers	66	58	45	50	57	44	44
Other white collars	66	54	53	49	50	45	41
Manual workers	56	43	45	47	40	43	36
House persons	58	47	52	47	39	46	39
Unemployed	64	48	50	45	44	51	35
Retired	63	50	52	49	44	45	38
Students	64	53	42	44	47	43	37
Agriculture and rural areas							
Important	64	52	50	50	48	46	40
Not important	42	35	36	34	32	29	23
EU aid to farmers should...							
Increase	64	53	53	55	47	52	38
Decrease	56	50	42	38	47	37	40
No change	64	51	49	46	48	42	41

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

This section of the report begins with an assessment of respondents' awareness of the Common Agricultural Policy (CAP), and continues with opinions about the importance of the CAP's priorities and the contribution the CAP makes in a number of areas. Views about who benefits from the CAP will also be considered.

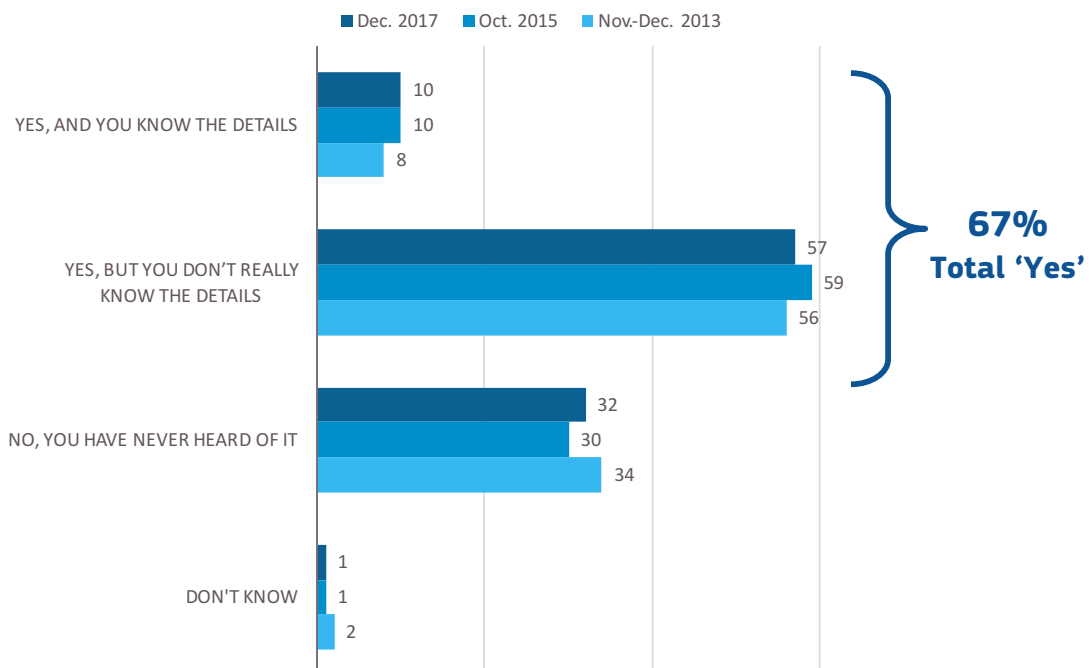
1 Awareness of the CAP

The majority have heard of the support farmers get via the CAP, but only one in ten know the details

More than two thirds (67%) of respondents have heard of the support the EU gives farmers through the CAP: 10% know the details, while 57% have heard of it but don't really know the details¹⁵. Almost one third (32%) have never heard of it.

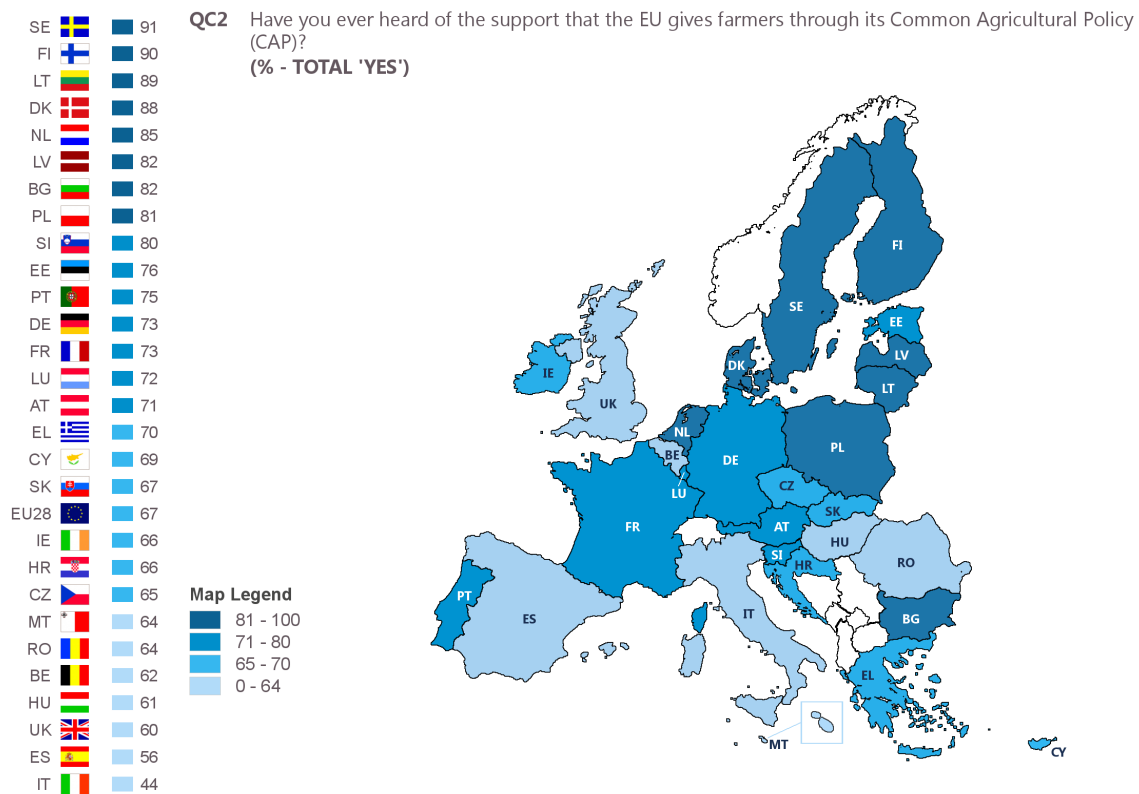
There has been little change in results since 2015, with a two-point decrease in overall awareness. The longer term trend since 2013 is also relatively stable (+3 pp).

QC2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)? (% - EU)

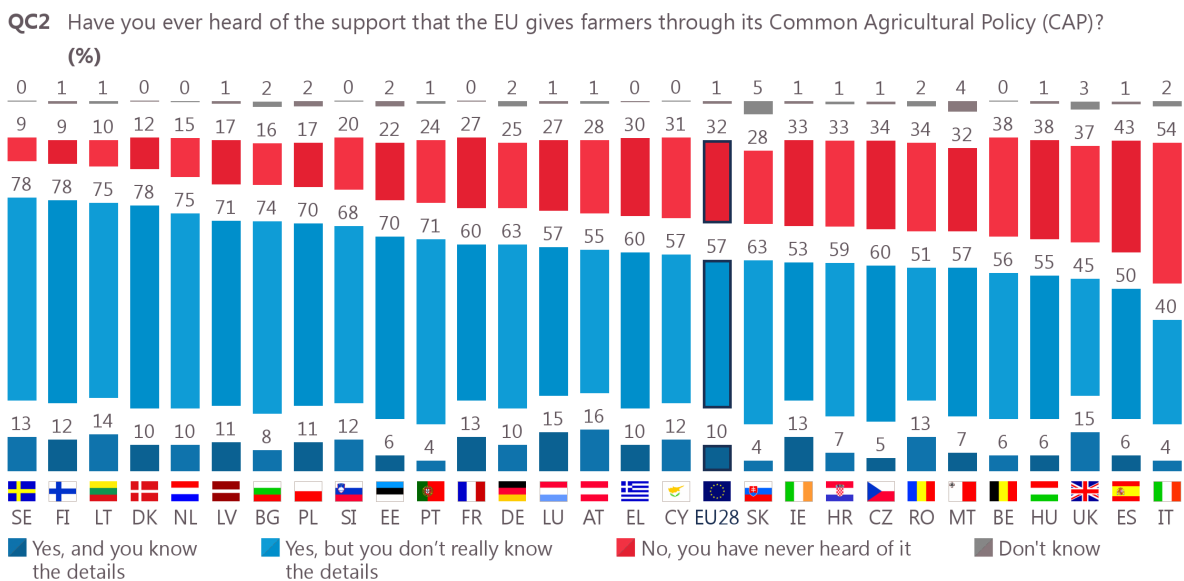


¹⁵ QC2 Have you ever heard about the support that the EU gives farmers through its Common Agricultural Policy (CAP)? Yes, and you know the details; Yes, but you don't really know the details; No, you have never heard of it, Don't Know.

Awareness of the CAP is highest amongst respondents living in the Nordic and Baltic Member States.



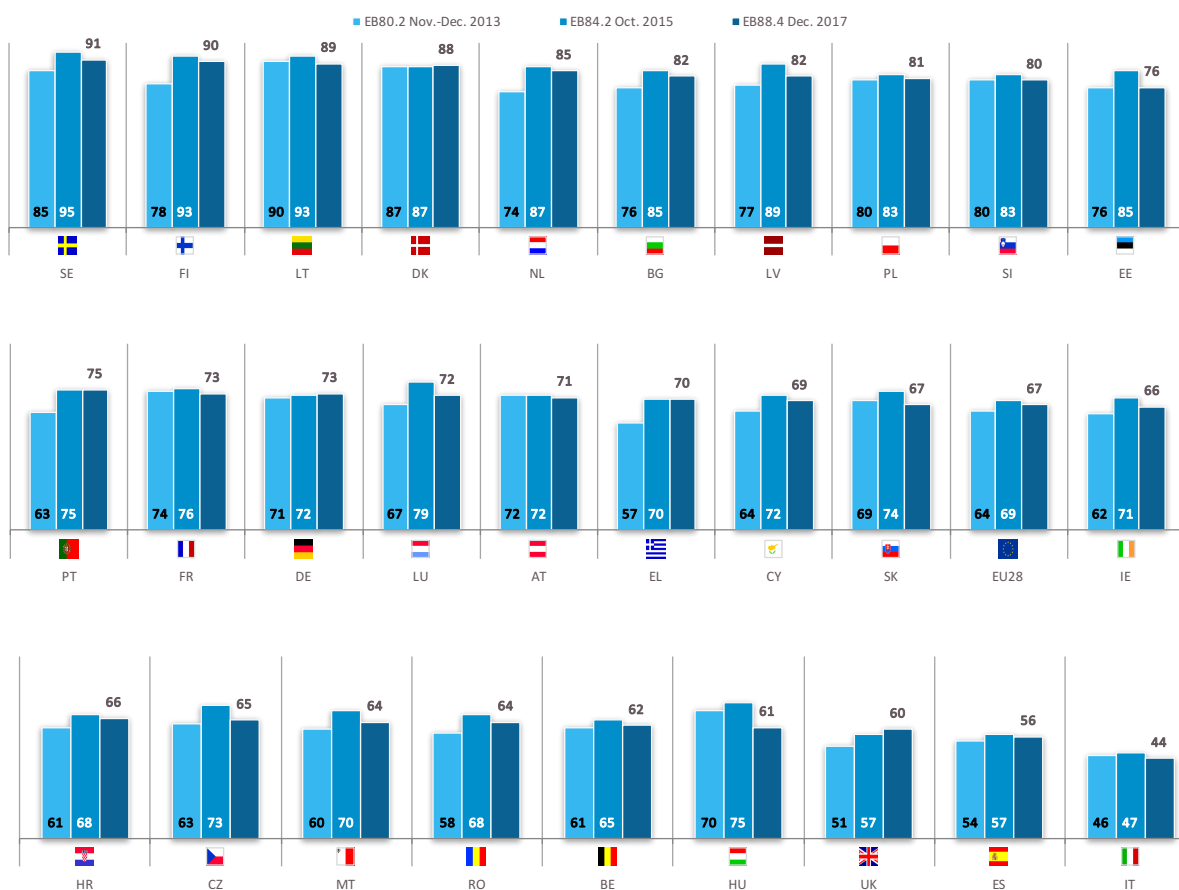
At least half of the respondents in all but one country has heard of the support the EU gives farmers through the CAP. Awareness is highest amongst those in Sweden (91%), Finland (90%) and Lithuania (89%), and lowest amongst respondents in Italy (44%), Spain (56%) and the United Kingdom (60%). In 17 EU Member States at least one in ten have heard of the support provided through the CAP and know the details, with the highest proportions seen in Austria (16%), the United Kingdom, Luxembourg (both 15%) and Lithuania (14%).



Since 2015 awareness has declined in 24 countries, most notably amongst respondents in Hungary (-14 pp), Estonia (-9 pp) and the Czech Republic (-8 pp). In contrast, the largest increases in awareness are observed amongst those in the United Kingdom (+3 pp).

In contrast, the longer term trend since 2013 shows awareness has increased in 22 EU Member States.

QC2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)?
(% - TOTAL 'YES')







The **socio-demographic analysis** shows the following:

- Men are more likely to be aware of the support given to farmers via the CAP (71% vs 63% of women).
- Those aged 25+, and in particular those aged 40+ are the most likely to be aware. For example, 72% of those aged 55+ are aware, compared to 47% of 18-24 year olds.
- The longer respondents remained in education, the more likely they are to be aware of this support: 81% who completed their education aged 20+ are aware, compared to 56% of those who completed education aged 15 or younger.
- Respondents living in rural villages are the most likely to be aware (71%), compared to those in small/mid-sized towns (66%) or in large towns (67%).

In addition, respondents who think agriculture and rural areas are important are more likely to be aware than those who do not think this way (69% vs 53%). Finally, respondents who think EU aid to farmers should decrease are more likely to be aware (74% vs 68% who think aid should increase).

QC2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)?
(% - EU)

	Total 'Yes'
EU28	67
 Gender	
Man	71
Woman	63
 Age	
15-24	47
25-39	64
40-54	73
55 +	72
 Education (End of)	
15-	56
16-19	66
20+	81
Still studying	50
 Subjective urbanisation	
Rural village	71
Small/ mid size town	66
Large town	67
Agriculture and rural areas	
Important	69
Not important	53
EU aid to famers should...	
Increase	68
Decrease	74
No change	69

2 The perceived performance of the CAP

More than seven in ten Europeans think the CAP is fulfilling its role in securing a stable supply of food in the EU

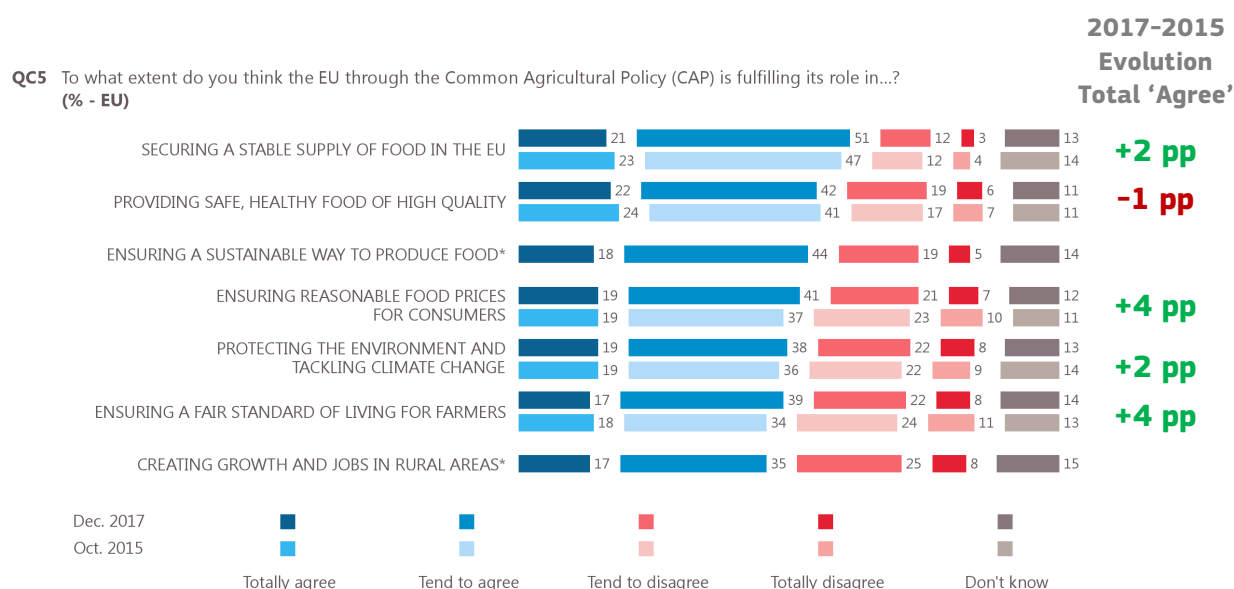
Respondents were asked their opinion of the performance of the CAP in a range of areas¹⁶. Almost three quarters (72%) agree the CAP is fulfilling its role in securing a stable supply of food in the EU¹⁷: 21% totally agree and 51% tend to agree.

Almost two thirds (64%) think the CAP is fulfilling its role in providing safe, healthy food of high quality¹⁸, with 22% totally agreeing and 42% tending to agree. More than six in ten (62%) also think the CAP is ensuring a sustainable way to produce food, with 18% in total agreement and 44% tending to agree. Almost as many (60%) think the CAP is ensuring reasonable food prices for consumers: 19% totally agree and 41% tend to agree. Almost as many (60%) think the CAP is ensuring reasonable food prices for consumers: 19% totally agree and 41% tend to agree.

At least half agree the CAP is protecting the environment and tackling climate change (57%), ensuring a fair standard of living for farmers (56%) and creating growth and jobs in rural areas (52%). In each case almost one in five totally agree.

The changes in overall agreement since 2015 are generally small, with the largest a four-point increase in the proportion who agree the CAP is ensuring reasonable food prices for consumers, and a four-point increase in the proportion who agree it is ensuring a fair standard of living for consumers.

These results highlight that for the majority, the CAP is succeeding in the areas that are most important for respondents, and in particular providing safe, healthy food of high quality and protecting the rural environment.



¹⁶ QC5 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; Creating growth and jobs in rural areas; Ensuring reasonable food prices for consumers; Securing a stable supply of food in the EU; Ensuring a sustainable way to produce food; Protecting the environment and tackling climate change; Providing safe, healthy food of high quality. Totally agree, Tend to agree, Tend to disagree, Total disagree, Don't know.

¹⁷ In the previous survey the wording of the option "securing a stable supply of food in the EU" was "securing food supply in the EU" – given this change the trend results should be interpreted with caution.

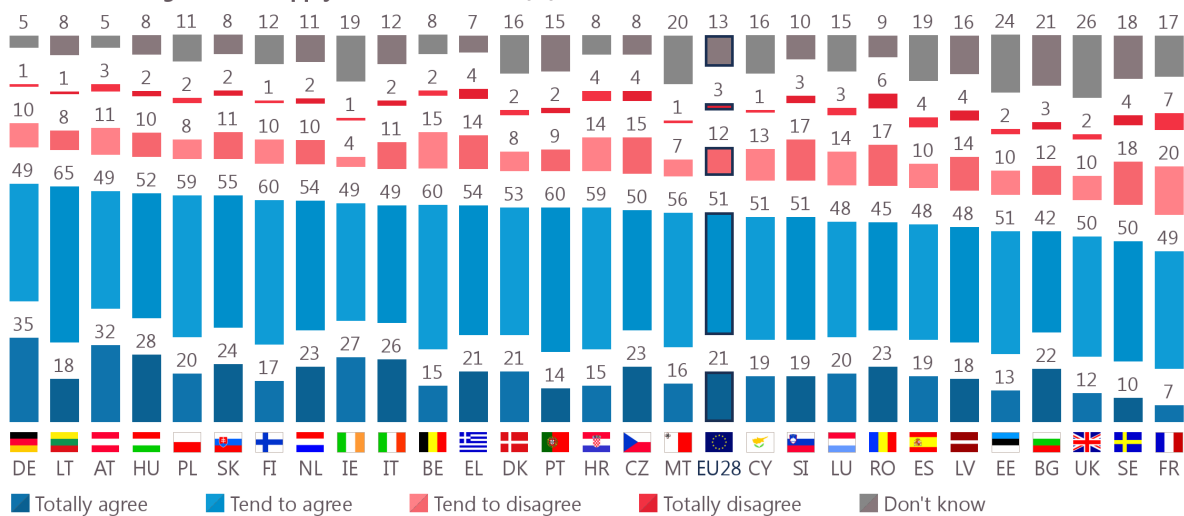
¹⁸ In the previous survey the wording of the option "providing safe, healthy food of high quality" was "ensuring that agricultural products are of good quality, healthy and safe" – given this change the trend results should be interpreted with caution.

In every country, a majority of respondents think the CAP is fulfilling its role in securing a stable supply of food in the EU. Proportions range from 84% in Germany, 83% in Lithuania and 81% in Austria to 56% in France, 60% in Sweden and 62% in the United Kingdom. Furthermore, in 14 countries at least one in five respondents totally agree, most notably in Germany (35%), Austria (32%) and Hungary (28%).

At least one in five respondents in the United Kingdom (26%), Estonia (24%) and Malta (20%) say they don't know.

QC5.4 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 (%)



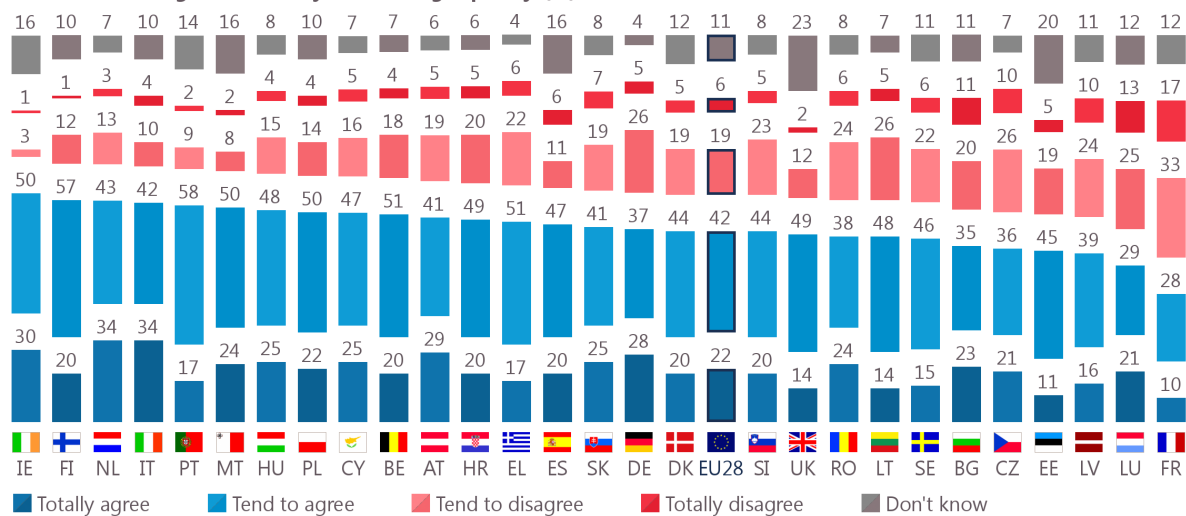
In all but one country, at least half of all respondents agree the CAP is fulfilling its role in providing safe, healthy food of high quality. Respondents in Ireland (80%), the Netherlands and Finland (both 77%) are the most likely to agree, compared to 38% in France, 50% in Luxembourg and 55% in Latvia.

In 20 countries, at least one in five totally agree, with the highest proportions observed in the Netherlands, Italy (both 34%) and Ireland (30%).

At least one in five in the United Kingdom (23%) and Estonia (20%) say they don't know.

QC5.7 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?

Providing safe, healthy food of high quality (%)



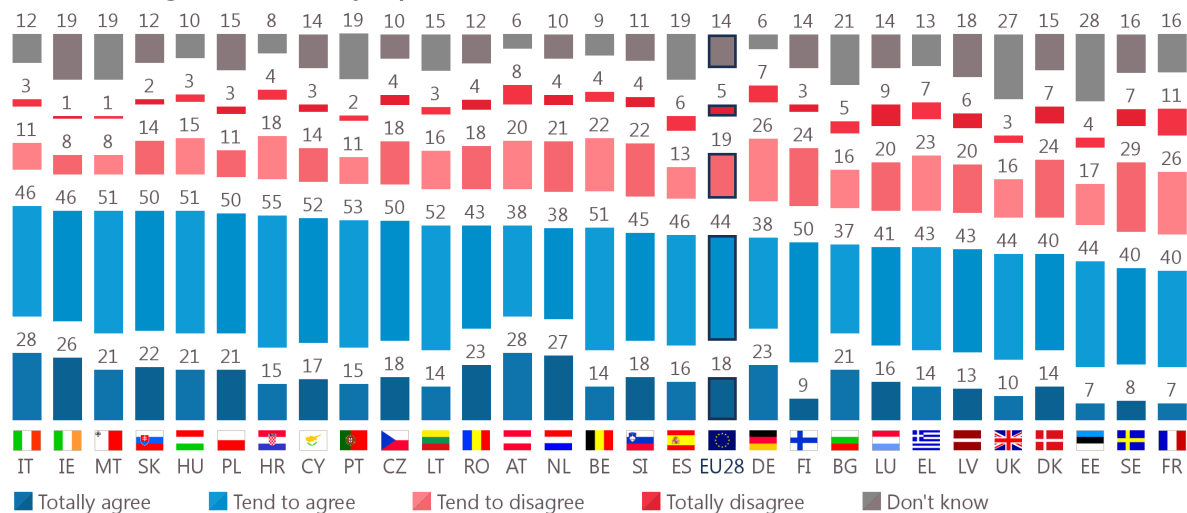
In all but two EU Member States the majority of respondents say the CAP is fulfilling its role in ensuring a sustainable way to produce food. Respondents in Italy (74%), Ireland, Hungary, Malta and Slovakia (all 72%) are the most likely to agree, while those in France (47%), Sweden (48%) and Estonia (51%) are the least likely to do so.

In 11 countries, at least one in five totally agree, with those in Austria, Italy (both 28%) and the Netherlands (27%) the most likely to do so.

The proportion of respondents who say they don't know is particularly high in Estonia (28%), the United Kingdom (27%) and Bulgaria (21%).

QC5.5 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 (%)



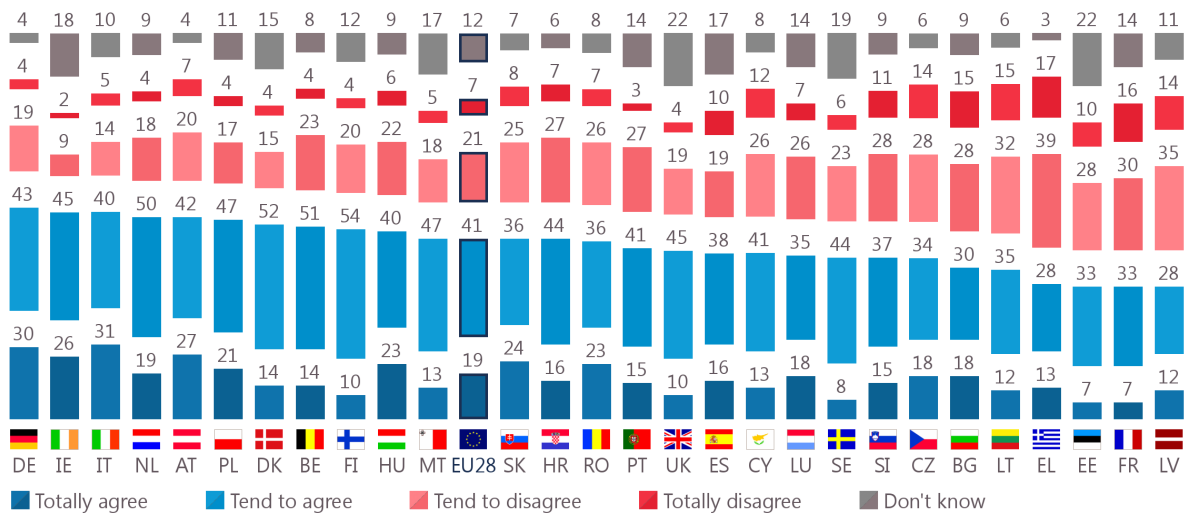
In 22 countries, the majority of respondents agree the CAP is fulfilling its role in ensuring reasonable food prices for consumers, with those in Germany (73%), Ireland and Italy (both 71%) the most likely to agree. At the other end of the scale, 40% in Latvia, France and Estonia and 41% in Greece also agree.

Respondents in Italy (31%), Germany (30%) and Austria (27%) are the most likely to totally agree.

More than one in five in Estonia and the United Kingdom (both 22%) say they do not know.

QC5.3 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 (%)



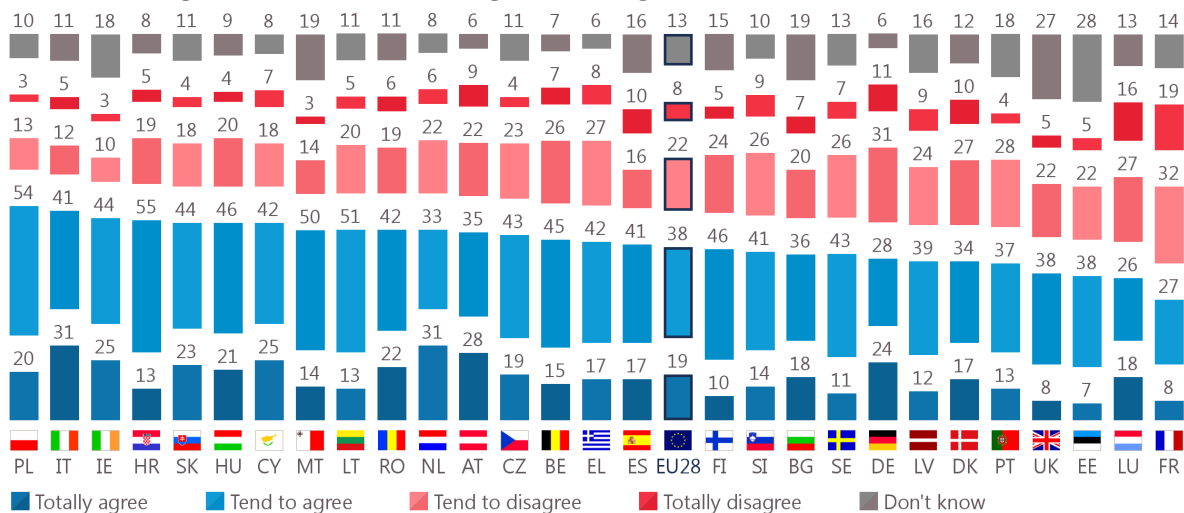
At least half of all respondents in 24 countries agree the CAP is fulfilling its role in protecting the environment and tackling climate change, with respondents in Poland (74%), Italy (72%) and Ireland (69%) the most likely to think this. In contrast, 35% in France, 44% in Luxembourg and 45% in Estonia agree.

Respondents in the Netherlands, Italy (both 31%) and Austria (28%) are the most likely to totally agree.

More than one quarter of respondents in Estonia (28%) and the United Kingdom (27%) say they don't know.

QC5.6 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 (%)

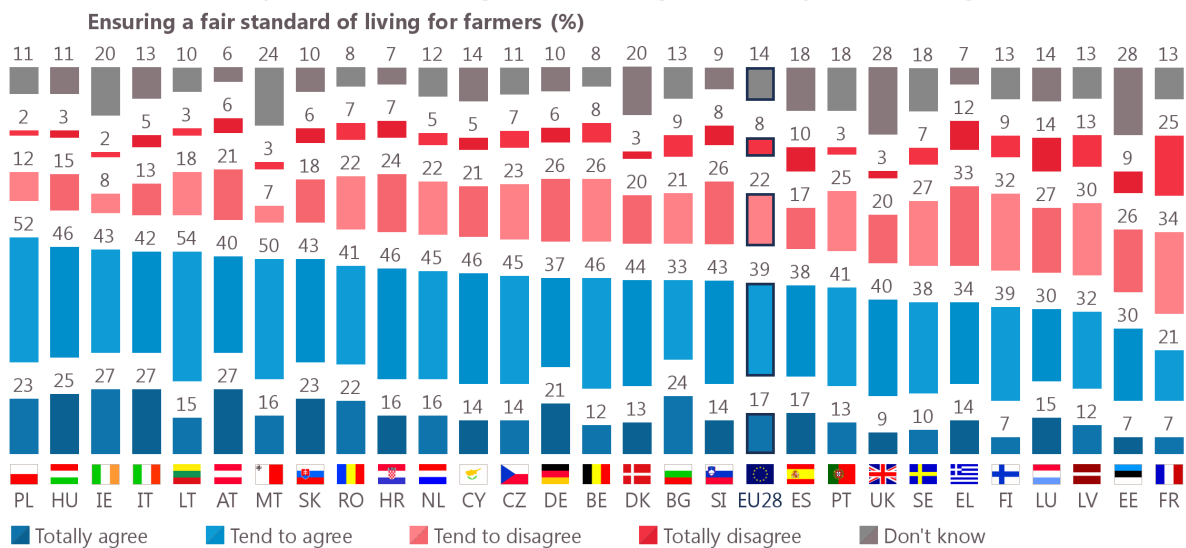


In 20 EU Member States, the majority agrees the CAP is fulfilling its role in ensuring a fair standard of living for farmers, with respondents in Poland (75%), Hungary (71%) and Ireland (70%) the most likely to think this way. At the other end of the scale, 28% in France, 37% in Estonia and 44% in Latvia also agree.

Respondents in Ireland, Italy, Austria (all 27%) and Bulgaria (24%) are the most likely to totally agree.

At least one in five respondents in the United Kingdom, Estonia (both 28%), Malta (24%), Ireland and Denmark (both 20%) say they don't know.

QC5.1 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?

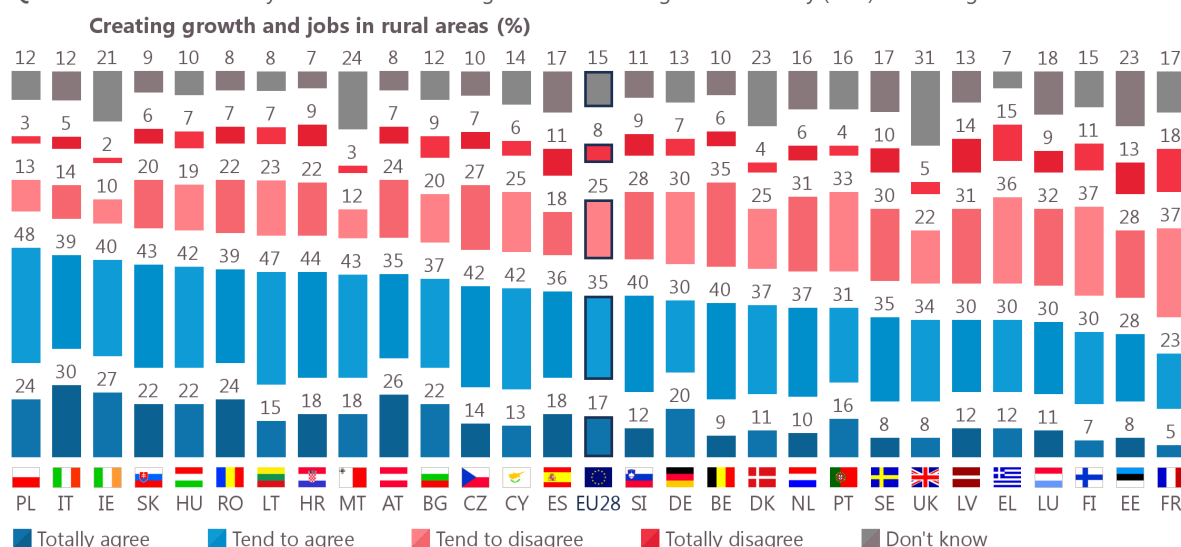


In 16 countries, at least half of all respondents agree the CAP is fulfilling its role in creating growth and jobs in rural areas. Respondents in Poland (72%), Italy (69%) and Ireland (67%) are the most likely to agree, particularly compared to those in France (28%), Estonia (36%) and Finland (37%).

Respondents in Italy (30%), Ireland (27%) and Austria (26%) are the most likely to totally agree.

In the United Kingdom (31%), Malta (24%), Denmark and Estonia (both 23%) large proportions of respondents say they do not know.

QC5.2 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?



Since 2015, changes in the proportions who think the CAP is fulfilling its role in **securing a stable supply of food in the EU** have generally been small. The largest increase is observed in Spain and Italy (both +5 pp), and the largest decreases in Bulgaria (-10 pp) and Estonia (-8 pp).






























The most notable changes in agreement that the CAP is fulfilling its role in **providing safe, healthy food of high quality** are declines in Luxembourg (-19 pp), the Netherlands (-10 pp) and France (-9 pp). Agreement levels have increased most notably amongst respondents in Spain and Poland (both +6 pp).

Respondents in Poland, Spain (both +10 pp) and Italy (+9 pp) are now more likely to agree the CAP is fulfilling its role in **ensuring reasonable food prices for consumers**. In contrast, agreement has declined amongst those in Estonia (-10 pp) and Latvia (-7 pp).

The largest increases in the proportion who agree the CAP is fulfilling its role in **protecting the environment and tackling climate change** are observed amongst respondents in Poland (+11 pp), Greece (+9 pp) and Sweden (+8 pp). The largest declines are seen amongst those in Portugal (-18 pp), Luxembourg (-14 pp) and the Netherlands (-10 pp).

Respondents in Poland (+16 pp), Spain (+11 pp), Italy and Denmark (both +10 pp) are now more likely to agree the CAP is fulfilling its role in **ensuring a fair standard of living for farmers**, compared to 2015. Those in Luxembourg (-8 pp) and Finland (-7 pp) are now less likely to agree.

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

		Securing a stable supply of food in the EU		Providing safe, healthy food of high quality		Ensuring reasonable food prices for consumers		Protecting the environment and tackling climate change		Ensuring a fair standard of living for farmers	
		2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015
EU28		72	▲ 2	64	▼ 1	60	▲ 4	57	▲ 2	56	▲ 4
BE		75	▼ 2	71	▼ 2	65	▲ 1	60	=	58	▲ 1
BG		64	▼ 10	58	▲ 1	48	=	54	▲ 1	57	=
CZ		73	=	57	▼ 3	52	▲ 5	62	▲ 4	59	▲ 6
DK		74	▲ 4	64	▲ 4	66	▲ 4	51	▲ 4	57	▲ 10
DE		84	▲ 2	65	▼ 3	73	▲ 5	52	▼ 8	58	=
EE		64	▼ 8	56	▼ 6	40	▼ 10	45	▼ 2	37	▲ 3
IE		76	▲ 2	80	▲ 4	71	▲ 4	69	▲ 7	70	▲ 1
EL		75	▲ 4	68	▲ 5	41	▲ 1	59	▲ 9	48	▼ 3
ES		67	▲ 5	67	▲ 6	54	▲ 10	58	▲ 2	55	▲ 11
FR		56	▼ 4	38	▼ 9	40	▲ 3	35	▼ 1	28	▼ 6
HR		74	▲ 4	69	▲ 4	60	▼ 2	68	▲ 3	62	▲ 4
IT		75	▲ 5	76	▲ 4	71	▲ 9	72	▲ 6	69	▲ 10
CY		70	▼ 5	72	▼ 3	54	▲ 1	67	▲ 2	60	▼ 2
LV		66	▼ 4	55	▼ 4	40	▼ 7	51	▼ 2	44	▲ 1
LT		83	▲ 3	62	▼ 2	47	▼ 1	64	▲ 4	69	▲ 3
LU		68	▼ 7	50	▼ 19	53	▼ 6	44	▼ 14	45	▼ 8
HU		80	▼ 2	73	▼ 4	63	▼ 4	67	▼ 8	71	▲ 2
MT		72	▼ 3	74	▼ 6	60	▼ 2	64	▼ 6	66	▼ 2
NL		77	▼ 7	77	▼ 10	69	▼ 5	64	▼ 10	61	▼ 3
AT		81	▲ 2	70	=	69	▲ 8	63	▲ 3	67	▲ 9
PL		79	▲ 4	72	▲ 6	68	▲ 10	74	▲ 11	75	▲ 16
PT		74	▲ 3	75	▼ 2	56	▼ 2	50	▼ 18	54	▲ 1
RO		68	▲ 2	62	▼ 2	59	▼ 2	64	▲ 4	63	▲ 4
SI		70	▲ 3	64	▲ 4	52	▲ 6	55	▲ 6	57	▲ 8
SK		79	▼ 1	66	=	60	▲ 2	67	▲ 3	66	▲ 9
FI		77	▼ 4	77	▼ 3	64	▲ 1	56	▲ 3	46	▼ 7
SE		60	▲ 2	61	▲ 3	52	▼ 1	54	▲ 8	48	▲ 6
UK		62	▲ 1	63	▼ 4	55	▲ 1	46	▲ 3	49	▲ 4




The **socio-demographic analysis** illustrates the following:

- Respondents who completed their education prior to the age of 20 are the most likely to agree the CAP is fulfilling its role to **create growth and jobs in rural areas**, and to **protect the environment and tackle climate change**. Those who completed education aged 16-19 are the most likely to agree when it comes to **ensuring a sustainable way to produce food** (64% vs 58% who completed education aged 20+).
- Other white-collar workers are the most likely to agree the CAP is fulfilling its role in most of these areas. For instance, 62% agree it is fulfilling its role in ensuring a fair standard of living for farmers, compared to 49% of the unemployed.
- Respondents living in large towns are the most likely to agree the CAP is fulfilling its role in each of these areas. For example, 57% agree it is creating growth and jobs in rural areas, compared to 49% living in rural villages.

In addition, those who have a positive image of the EU are more likely to agree in each of these areas, compared to those with a negative image. Respondents who think agriculture and rural areas are important for the future are more likely to agree the CAP is fulfilling its role in each of these areas, compared to those who say these things are not important. For instance, 73% who think these things are important agree the CAP is ensuring a stable food supply, compared to 55% who think these things are not important.

Finally, respondents who think the CAP benefits all Europeans are more likely to agree it is fulfilling its role in each of these areas.

QC5 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Total 'Agree' (% - EU)

	Securing a stable supply of food in the EU	Providing safe, healthy food of high quality	Ensuring a sustainable way to produce food	Ensuring reasonable food prices for consumers	Protecting the environment and tackling climate change	Ensuring a fair standard of living for farmers	Creating growth and jobs in rural areas
EU28	72	64	62	60	57	56	52
 Education (End of)							
15-	67	65	61	59	58	57	54
16-19	72	65	64	59	58	57	53
20+	73	62	58	60	53	53	48
Still studying	74	66	59	65	56	55	52
 Socio-professional category							
Self-employed	75	65	63	63	57	56	53
Managers	75	64	59	62	51	55	49
Other white collars	77	68	66	66	62	62	56
Manual workers	69	64	62	59	57	55	52
House persons	67	65	63	59	60	58	57
Unemployed	64	55	55	51	49	49	43
Retired	70	63	62	58	56	56	51
Students	74	66	59	65	56	55	52
 Subjective urbanisation							
Rural village	69	62	60	57	56	55	49
Small/ mid-size town	72	62	61	60	55	54	51
Large town	74	68	65	63	59	60	57
Image of EU							
Positive	81	72	70	69	65	65	61
Neutral	70	62	60	58	53	54	50
Negative	61	52	49	45	44	42	39
Agriculture and rural areas							
Important	73	65	63	61	57	58	53
Not important	55	50	49	46	46	44	42
CAP benefits all European citizens							
Agree	82	75	73	71	67	67	63
Disagree	62	49	47	45	42	43	36

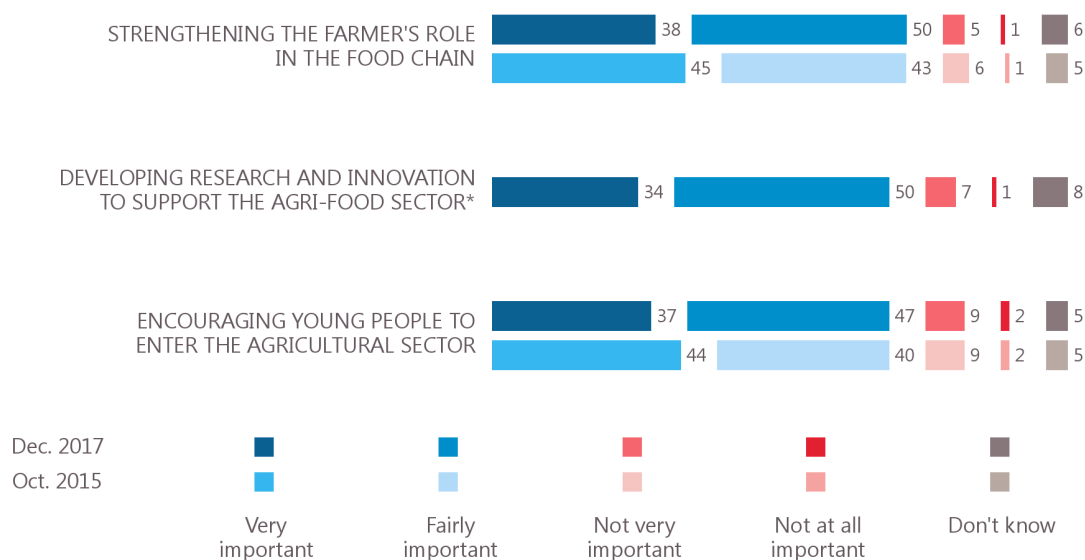
3 The perceived importance of the priorities of the CAP

Large majorities think these three priorities of the CAP are important - particularly strengthening the farmer's role in the food chain

Almost nine in ten respondents (88%) think strengthening the farmer's role in the food chain is important: 38% consider it very important and 50% think it is fairly important¹⁹. Almost as many (84%) think developing research and innovation to support the agri-food sector is important, with 34% saying this is very important and 50% that it is fairly important. More than eight in ten (84%) think encouraging young people to enter the agricultural sector is important: 37% say it is very important and 47% that it is fairly important.

Compared to 2015 there has been no change in the overall importance respondents place on each of the items that appeared in both surveys. However, respondents are now less likely to say strengthening the farmer's role in the food chain (-7 pp) or encouraging young people to enter the agricultural sector (-7 pp) are very important.

QC7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
(% - EU)

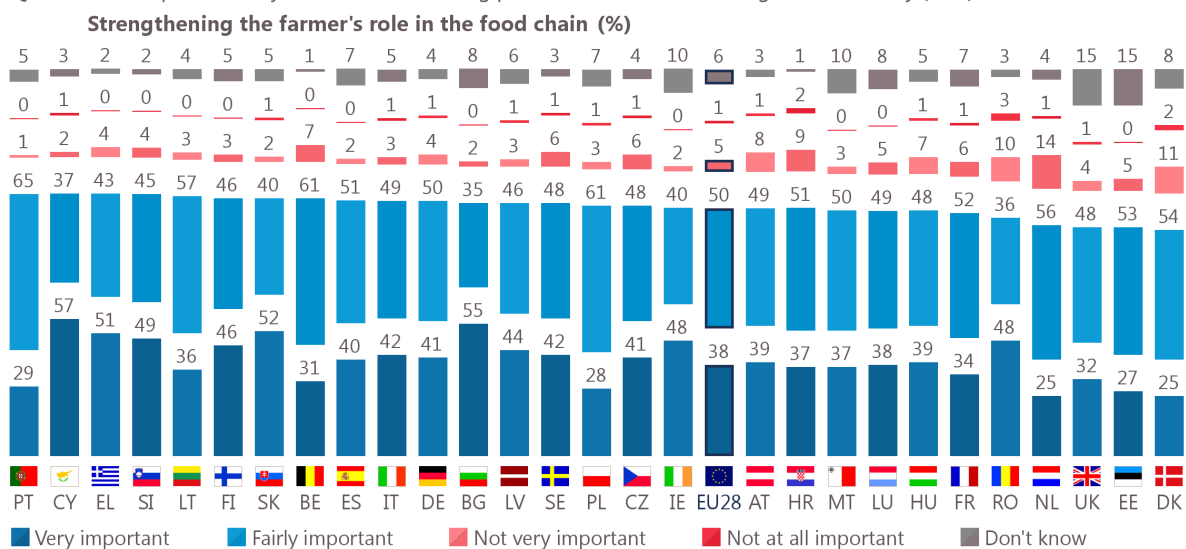


¹⁹ QC7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are? Developing research and innovation to support the agri-food sector; Strengthening the farmer's role in the food chain; Encouraging young people to enter the agricultural sector. Very important, Fairly important, Not very important, Not at all important, Don't know.

More than three quarters of respondents in each country think strengthening the farmer's role in the food chain is important, with proportions ranging from 94% in Greece, Cyprus, Portugal and Slovenia to 79% in Denmark and 80% in the United Kingdom and Estonia.

At least half of all respondents in Cyprus (57%), Bulgaria (55%), Slovakia (52%) and Greece (51%) think this is very important.






























QC7.2 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?



Changes in opinion since 2015 have been relatively small. The largest increases in the proportion who think strengthening the farmer's role in the food chain is important are seen amongst those in Lithuania (+4 pp), Poland, Latvia, Italy and Greece (all +3 pp), and the largest decreases are observed in the United Kingdom (-7 pp) and Estonia (-6 pp).

QC7.2 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?

Strengthening the farmer's role in the food chain (%)

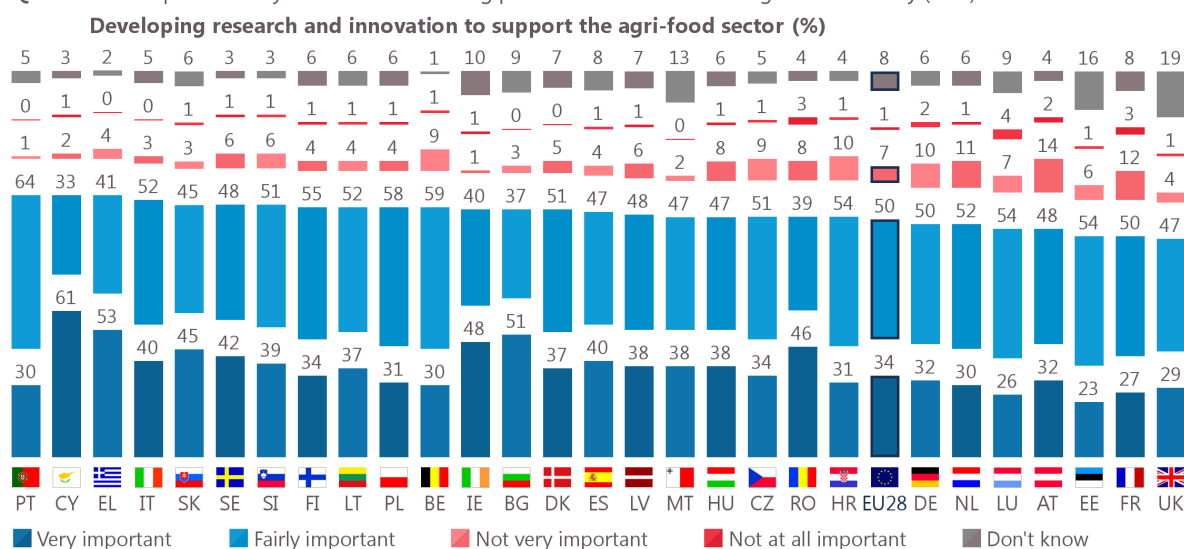
		Total 'Important'	2017 - 2015	Total 'Not important'	2017 - 2015	Don't know
EU28		88	=	6	▼ 1	6
LT		93	▲ 4	3	▼ 3	4
EL		94	▲ 3	4	▼ 2	2
IT		91	▲ 3	4	▼ 2	5
LV		90	▲ 3	4	▼ 4	6
PL		89	▲ 3	4	▼ 6	7
SI		94	▲ 2	4	=	2
SE		90	▲ 2	7	▼ 2	3
CY		94	▲ 1	3	▼ 1	3
PT		94	▲ 1	1	▼ 3	5
BE		92	▲ 1	7	▲ 1	1
DE		91	▲ 1	5	▼ 2	4
AT		88	▲ 1	9	▼ 2	3
NL		81	▲ 1	15	▼ 2	4
ES		91	=	2	▼ 2	7
CZ		89	=	7	▼ 2	4
HR		88	=	11	▲ 2	1
FR		86	=	7	=	7
FI		92	▼ 1	3	▼ 1	5
DK		79	▼ 1	13	▲ 1	8
RO		84	▼ 2	13	▲ 6	3
SK		92	▼ 3	3	▲ 1	5
BG		90	▼ 3	2	▲ 1	8
IE		88	▼ 3	2	▼ 1	10
LU		87	▼ 3	5	▼ 1	8
MT		87	▼ 3	3	=	10
HU		87	▼ 4	8	▲ 1	5
EE		80	▼ 6	5	=	15
UK		80	▼ 7	5	=	15

More than three quarters of respondents in each country say developing research and innovation to support the agri-food sector is important, with proportions ranging from 94% in Greece, Cyprus and Portugal to 76% in the United Kingdom and 77% in France and Estonia.

At least half of all respondents in Cyprus (61%), Greece (53%) and Bulgaria (51%) think this is very important.

As this was a new option there are no trend results.

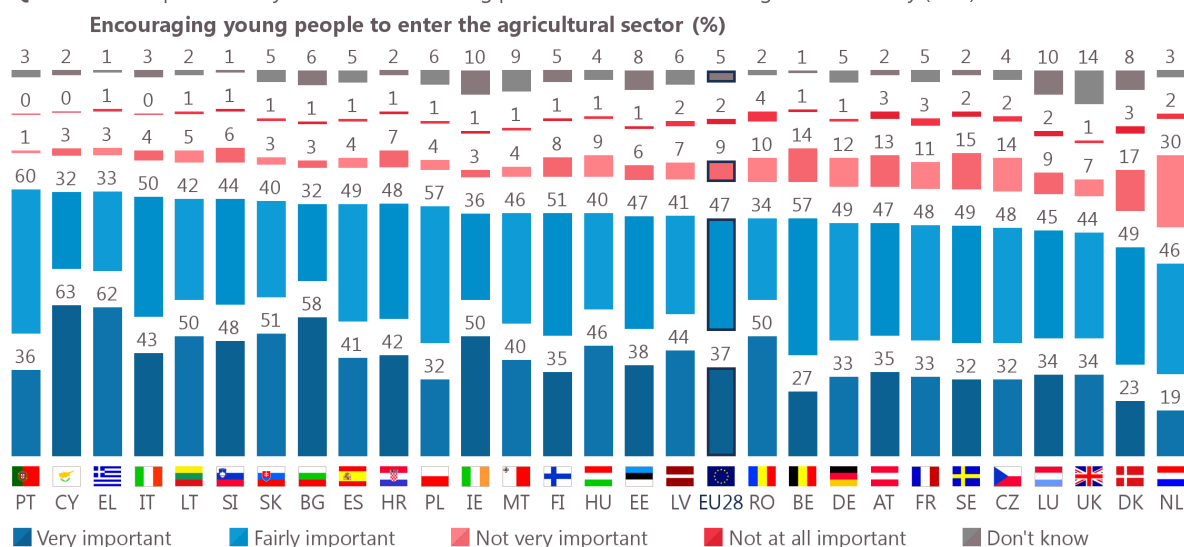
QC7.1 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?



The majority of respondents in each country think encouraging young people to enter the agricultural sector is important. Those in Portugal (96%), Greece and Cyprus (95%) are the most likely to think this way, compared to 65% in the Netherlands, 72% in Denmark and 78% in the United Kingdom.

At least half of all respondents in Cyprus (63%), Greece (62%), Bulgaria (58%), Romania and Ireland (both 50%) totally agree.


























QC7.3 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?



Changes in opinion since 2015 have been relatively small. The largest increases in the proportion who think encouraging young people to enter the agricultural sector is important are seen amongst those Poland (+5 pp), and the largest declines are observed amongst those in the United Kingdom (-7 pp).

QC7.3 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?

Encouraging young people to enter the agricultural sector (%)


		Total 'Important'	2017 - 2015	Total 'Not important'	2017 - 2015	Don't know
EU28		84	=	11	=	5
PL		89	▲ 5	5	▼ 8	6
IT		93	▲ 3	4	▼ 2	3
PT		96	▲ 2	1	▼ 3	3
HR		90	▲ 2	8	▼ 1	2
BE		84	▲ 2	15	▼ 1	1
EL		95	▲ 1	4	=	1
CY		95	▲ 1	3	▼ 1	2
ES		90	▲ 1	5	▼ 3	5
LV		85	▲ 1	9	▼ 2	6
DE		82	▲ 1	13	▼ 1	5
SE		81	▲ 1	17	=	2
LT		92	=	6	▲ 1	2
SI		92	=	7	▲ 2	1
AT		82	=	16	▲ 1	2
FI		86	▼ 1	9	▼ 1	5
CZ		80	▼ 1	16	▲ 1	4
DK		72	▼ 1	20	=	8
IE		86	▼ 2	4	▼ 1	10
FR		81	▼ 2	14	▲ 2	5
SK		91	▼ 3	4	=	5
HU		86	▼ 3	10	▲ 1	4
MT		86	▼ 3	5	▼ 2	9
RO		84	▼ 3	14	▲ 7	2
NL		65	▼ 3	32	▲ 3	3
BG		90	▼ 4	4	▲ 1	6
EE		85	▼ 4	7	▲ 2	8
UK		78	▼ 4	8	▼ 2	14
LU		79	▼ 7	11	=	10

Given the high proportion of respondents that think each of these priorities are important, it is perhaps not surprising that there are few **socio-demographic** differences. The only notable difference is that respondents aged 25+ are the most likely to think it is important to encourage young people to enter the agricultural sector: for example, 85% of those aged 25-39 think this way, compared to 75% of those aged 15-24.

The most consistent findings are based on variations in attitudes. Respondents who think agriculture and rural areas are important for the future are more likely to say each of these priority issues are important, compared to those who think agriculture and rural areas are not important. For instance, 90% who think these issues are important say strengthening the farmer's role in the food chain is an important priority, compared to 73% who think these topics are not important.

The same pattern applies when comparing those who think EU aid to farmers should increase with those who think it should decrease.

QC7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Total 'Important' (% - EU)

	Strengthening the farmer's role in the food chain	Developing research and innovation to support the agri-food sector	Encouraging young people to enter the agricultural sector
EU28	88	84	84
 Age			
15-24	85	83	75
25-39	88	84	85
40-54	89	85	87
55 +	88	84	86
Agriculture and rural areas			
Important	90	87	86
Not important	73	68	67
EU aid to famers should...			
Increase	92	89	91
Decrease	81	78	74
No change	90	86	85

4 The contribution of the CAP

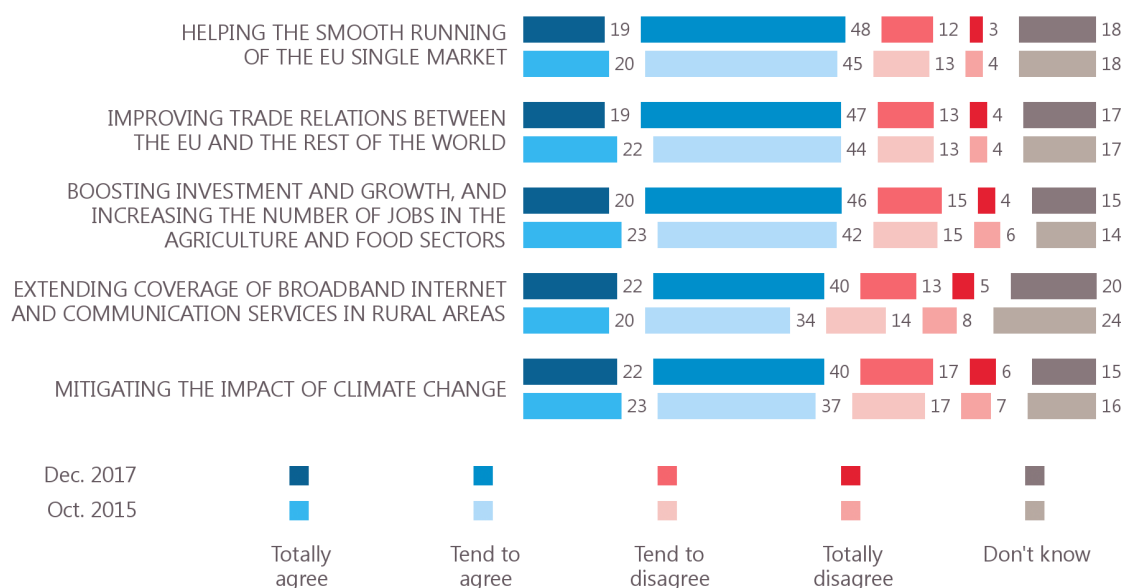
The majority think the CAP contributes to EU society in a number of ways.

More than two thirds of respondents agree the CAP contributes to the smooth running of the EU Single Market (67%), with 19% totally agreeing and 48% tending to agree²⁰. Two thirds agree it contributes by improving trade relations between the EU and the rest of the world, or by boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors (both 66%). In each case around one in five totally agree.

Just over six in ten say the CAP contributes to extending coverage of broadband Internet and communication services in rural areas (62%), with 22% totally agreeing and 40% tending to agree. The same proportion (62%) agree the CAP contributes to mitigating the impact of climate change: 22% totally agree and 40% tend to agree.

Changes since 2015 have generally been small, with the largest being an eight-point increase in the proportion who agree the CAP contributes to extending coverage of broadband Internet and communication services in rural areas.

QC8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - EU)



²⁰ QC8. 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; Helping the smooth running of the EU Single Market; Improving trade relations between the EU and the rest of the world; Mitigating the impact of climate change; Extending the coverage of broadband internet and communication services in rural areas. Totally agree; Tend to agree; Tend to disagree; Totally disagree; Don't know.

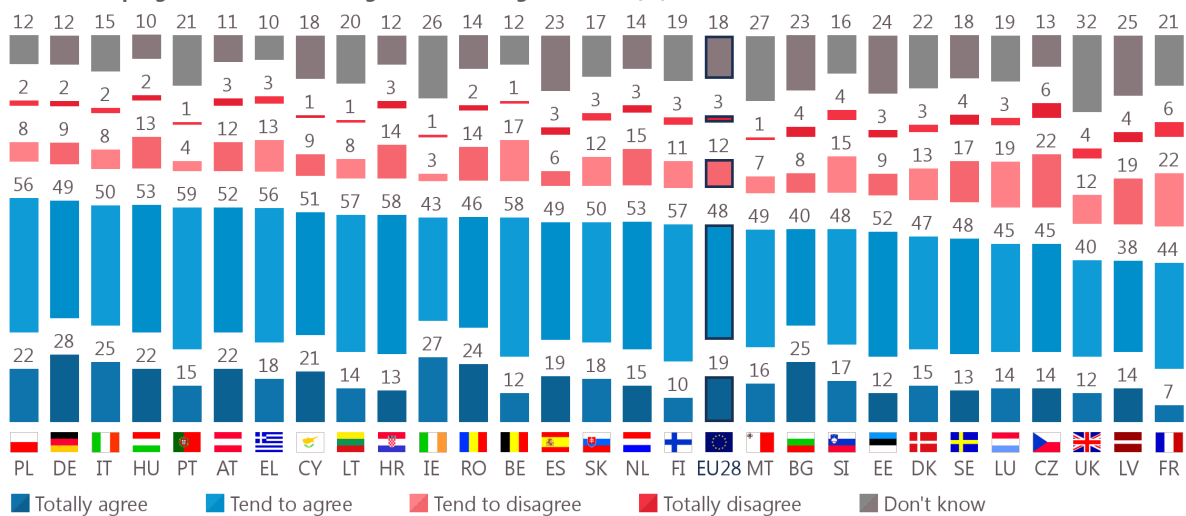
The majority of respondents in each country agree the CAP contributes to the smooth running of the EU Single Market, with proportions ranging from 78% in Poland, 77% in Germany and 75% in Italy and Hungary to 51% in France and 52% in the United Kingdom and Latvia.

In nine countries at least one in five totally agree, most notably in Germany (28%), Ireland (27%), Italy and Bulgaria (both 25%), Italy and Bulgaria (both 25%).

At least one in ten respondents in each country say they don't know, with the highest proportions in the United Kingdom (32%), Malta (27%) and Ireland (26%).

QC8.2 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?

Helping the smooth running of the EU Single Market (%)

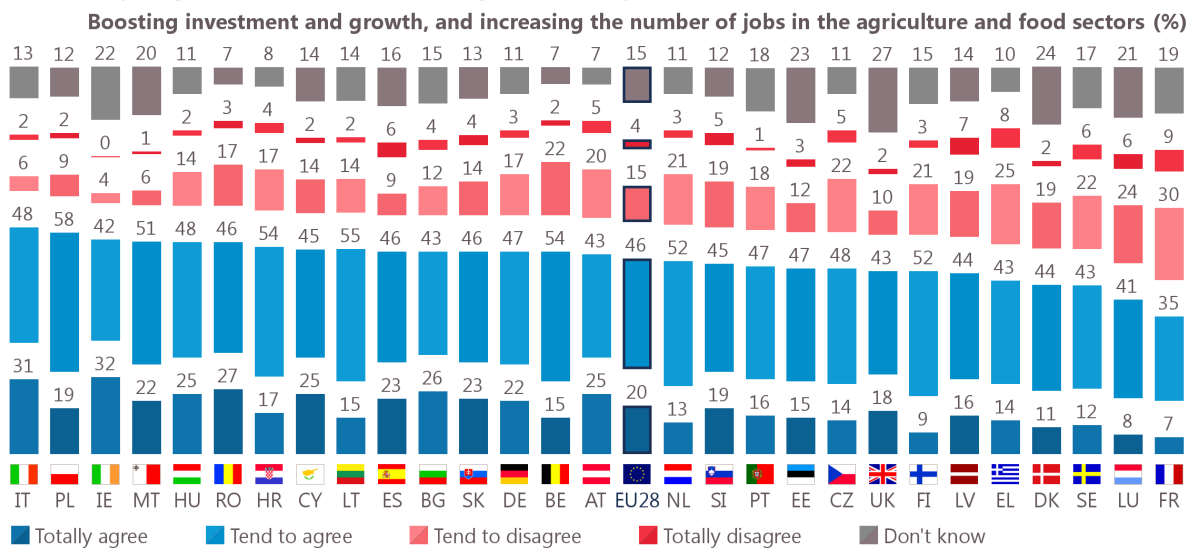


Respondents in Italy (79%), Poland (77%) and Ireland (74%) are the most likely to agree the CAP contributes to boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors. Those in France (42%), Luxembourg (49%), Sweden and Denmark (both 55%) are the least likely to agree.

More than three in ten respondents in Ireland (32%) and Italy (31%) totally agree.

In a number of countries, large proportions of respondents say they don't know, and this is particularly the case in the United Kingdom (27%) and Denmark (24%).

QC8.1 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?



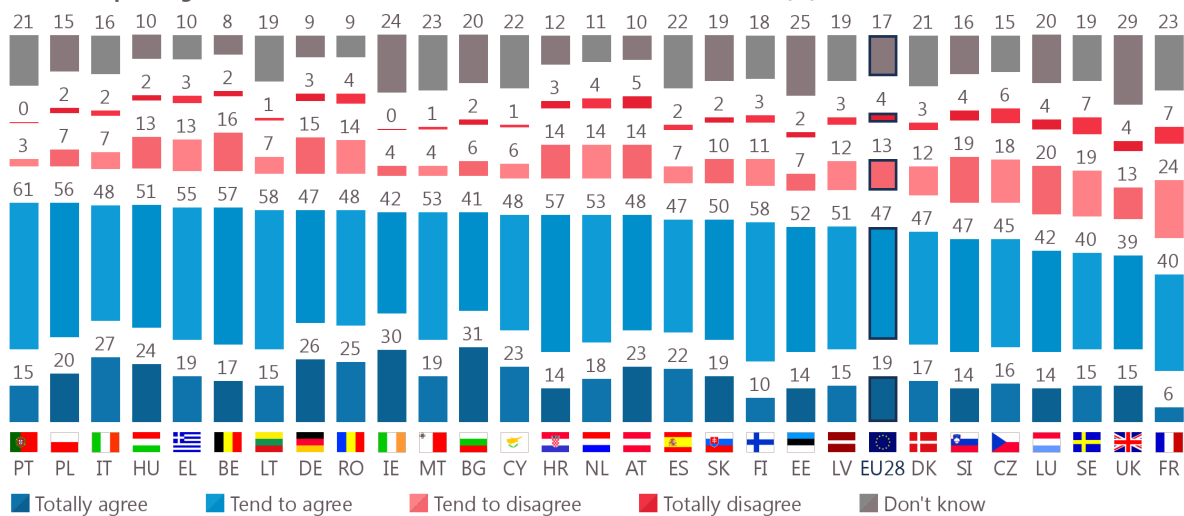
In all but one country, a majority agrees the CAP contributes to improving trade relations between the EU and the rest of the world. Respondents in Poland, Portugal (both 76%), Italy and Hungary (both 75%) are the most likely to do so, compared to 46% in France, 54% in the United Kingdom and 55% in Sweden.

Respondents in Bulgaria (31%), Ireland (30%) and Italy (27%) are the most likely to totally agree.

At least one quarter of respondents in the United Kingdom (29%) and Estonia (25%) say they don't know.

QC8.3 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?

Improving trade relations between the EU and the rest of the world (%)

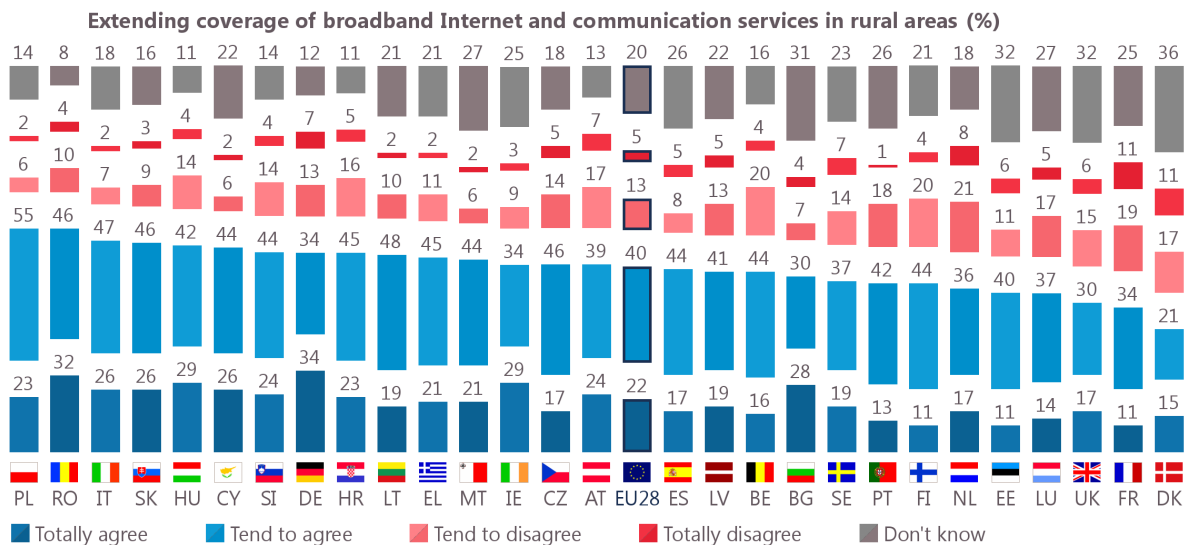


In 25 countries the majority of respondents agree the CAP contributes to extending coverage of broadband Internet and communication services in rural areas. Those in Poland, Romania (both 78%) and Italy (73%) are the most likely to agree, while those in Denmark (36%), France (45%) and the United Kingdom (47%) are the least likely to do so.

Respondents in Germany (34%), Romania (32%), Ireland and Hungary (both 29%) are the most likely to totally agree.

In a number of countries there are large proportions of respondents who say they don't know, with the largest observed amongst those in Denmark (36%), the United Kingdom and Estonia (both 32%).

QC8.5 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?

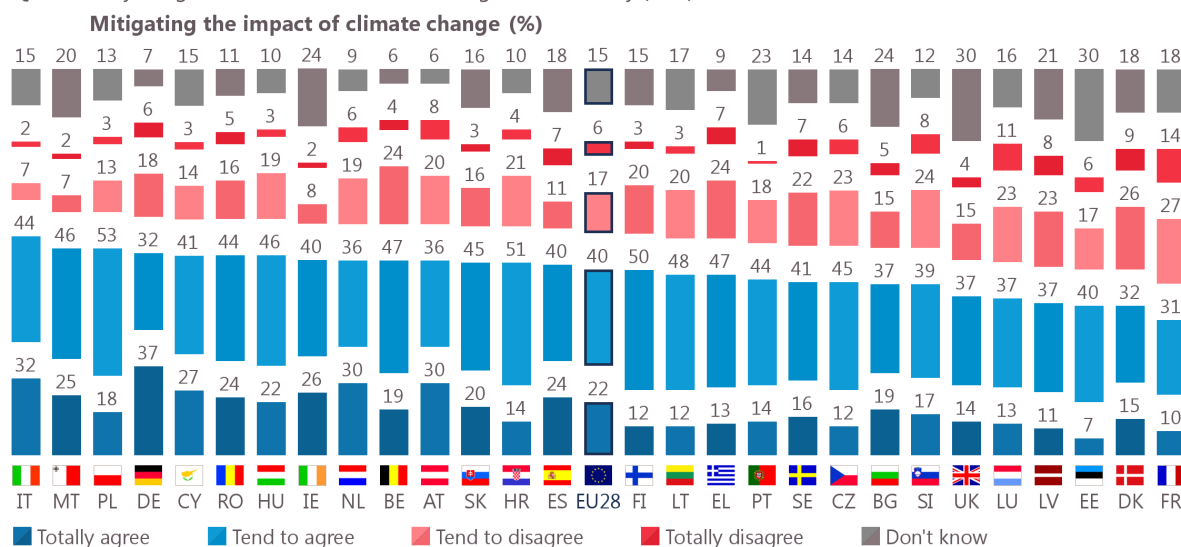


Respondents in Italy (76%), Malta and Poland (both 71%) are the most likely to agree the CAP contributes to mitigating the impact of climate change, particularly compared to those in France (41%), Estonia and Denmark (both 47%).

Respondents in Germany (37%), Italy (32%), the Netherlands and Austria (both 30%) are the most likely to totally agree.

Don't know responding is particularly high in Estonia and the United Kingdom (both 30%).

QC8.4 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?



The country level trend results since 2015 are mixed.

Respondents in Spain (+11 pp), Greece, Sweden (both +8 pp) and Poland (+7 pp) are now more likely to agree the CAP **helps the smooth running of the EU Single Market**, while those in Malta are less likely to do so (-8 pp).






























Those in Romania (+8 pp), Austria, Spain and Belgium (all +7 pp) are now more likely to agree the CAP contributes **to improving trade relations between the EU and the rest of the world**. In contrast, respondents in the United Kingdom are now less likely to agree (-7 pp).

Respondents in Spain (+10 pp) are now more likely to agree the CAP contributes to **boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors**, while those in Luxembourg are less likely to do so (-14 pp).

In all but two countries, respondents are now more likely to agree the CAP contributes to **extending coverage of broadband Internet and communication services in rural areas**, with the largest increases observed amongst those in Slovenia (+19 pp), Romania and Greece (both +18 pp) and Sweden and Slovakia (both +17pp). The United Kingdom is the only country where respondents are less likely to agree (-3 pp). There has been no change in opinion in Portugal.

Respondents in Spain (+11 pp) and Latvia (+10 pp) are now more likely to agree the CAP contributes to **mitigating the effects of climate change**, while those in Luxembourg (-13 pp) and Portugal (-10 pp) are now less likely to do so.

QC8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
(% - TOTAL 'AGREE')




		Helping the smooth running of the EU Single Market		Improving trade relations between the EU and the rest of the world		Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors		Extending coverage of broadband Internet and communication services in rural areas		Mitigating the impact of climate change	
		2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015
EU28		67	▲ 2	66	=	66	▲ 1	62	▲ 8	62	▲ 2
BE		70	▲ 5	74	▲ 7	69	=	60	▲ 6	66	▲ 4
BG		65	▲ 4	72	▲ 2	69	▼ 3	58	▲ 14	56	▲ 8
CZ		59	▲ 2	61	▲ 3	62	▲ 2	63	▲ 15	57	▲ 5
DK		62	▲ 2	64	▲ 6	55	▼ 2	36	▲ 7	47	▲ 4
DE		77	▲ 2	73	▲ 3	69	▼ 2	68	▲ 6	69	▼ 3
EE		64	▼ 2	66	▼ 4	62	▼ 9	51	▲ 8	47	▲ 7
IE		70	▲ 1	72	▼ 1	74	=	63	▲ 7	66	▲ 8
EL		74	▲ 8	74	▲ 6	57	▲ 1	66	▲ 18	60	▲ 7
ES		68	▲ 11	69	▲ 7	69	▲ 10	61	▲ 14	64	▲ 11
FR		51	=	46	▼ 2	42	▼ 3	45	▲ 3	41	▲ 2
HR		71	▼ 1	71	=	71	▼ 1	68	▲ 8	65	▲ 2
IT		75	=	75	▼ 2	79	▲ 1	73	▲ 7	76	▲ 2
CY		72	▼ 1	71	▼ 3	70	▼ 3	70	▲ 12	68	▲ 1
LV		52	▲ 4	66	▲ 3	60	▲ 6	60	▲ 6	48	▲ 10
LT		71	▲ 1	73	▲ 3	70	▼ 3	67	▲ 15	60	▲ 8
LU		59	▼ 6	56	▼ 5	49	▼ 14	51	▲ 2	50	▼ 13
HU		75	▼ 1	75	▼ 1	73	▼ 5	71	▲ 5	68	▼ 4
MT		65	▼ 8	72	▼ 1	73	▼ 5	65	▲ 10	71	▼ 5
NL		68	▼ 5	71	▼ 4	65	▼ 4	53	▲ 1	66	▼ 3
AT		74	▲ 4	71	▲ 7	68	▲ 6	63	▲ 9	66	▲ 4
PL		78	▲ 7	76	▲ 6	77	▲ 6	78	▲ 9	71	▲ 9
PT		74	▼ 2	76	=	63	▼ 6	55	=	58	▼ 10
RO		70	▲ 6	73	▲ 8	73	=	78	▲ 18	68	▲ 6
SI		65	▲ 6	61	▲ 5	64	▲ 2	68	▲ 19	56	▲ 6
SK		68	=	69	▲ 2	69	=	72	▲ 17	65	▲ 3
FI		67	▼ 2	68	=	61	▼ 5	55	▲ 7	62	▲ 1
SE		61	▲ 8	55	▲ 4	55	▲ 7	56	▲ 17	57	▲ 7
UK		52	▼ 3	54	▼ 7	61	▼ 3	47	▼ 3	51	▼ 3

The **socio-demographic analysis** illustrates the following:

- Respondents who completed their education aged 16 or older are the most likely to agree the CAP helps the **smooth running of the EU Single Market** and **contributes to improving trade relations between the EU and the rest of the world**. For instance, 69% of those who completed education aged 20+ agree the CAP helps the smooth running of the EU Single Market, compared to 63% of those who completed education aged 15 or younger.
- Other white collar workers are the most likely to agree the CAP contributes to each area.
- The more urbanised a respondent's environment, the more likely they are to agree the CAP contributes to **boosting investment and growth and increasing the number of jobs in the agriculture and food sectors, improving trade relations** and **mitigating the impact of climate change**. For example, 70% living in large towns think it contributes to boosting investment and growth, compared to 63% in rural villages.

In addition, respondents who think agriculture and rural areas are important are more likely to agree the CAP contributes to each of these areas, compared to those who think they are not important. For instance, 68% who think these areas are important say the CAP contributes to improving trade relations, compared to 53% who think these areas are not important. This pattern also applies when comparing respondents who agree the CAP benefits all European citizens, compared to those who disagree.

QC8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?
Total 'Agree' (% - EU)

	Helping the smooth running of the EU Single Market	Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors	Improving trade relations between the EU and the rest of the world	Extending coverage of broadband internet and communication services in rural areas	Mitigating the impact of climate change
EU28	67	66	66	62	62
 Education (End of)					
15-	63	65	63	59	61
16-19	68	67	68	65	63
20+	69	64	65	58	60
Still studying	67	67	69	61	63
 Socio-professional category					
Self-employed	72	68	70	66	66
Managers	68	65	65	57	58
Other white collars	75	71	72	68	67
Manual workers	67	67	66	64	62
House persons	63	65	62	61	58
Unemployed	61	59	62	59	56
Retired	64	63	63	58	61
Students	67	67	69	61	63
 Subjective urbanisation					
Rural village	67	63	64	61	60
Small/ mid-size town	67	65	66	61	62
Large town	69	70	69	63	64
Agriculture and rural areas					
Important	69	67	68	64	63
Not important	51	53	53	51	50
CAP benefits all European citizens					
Agree	80	77	78	72	72
Disagree	56	51	55	51	50

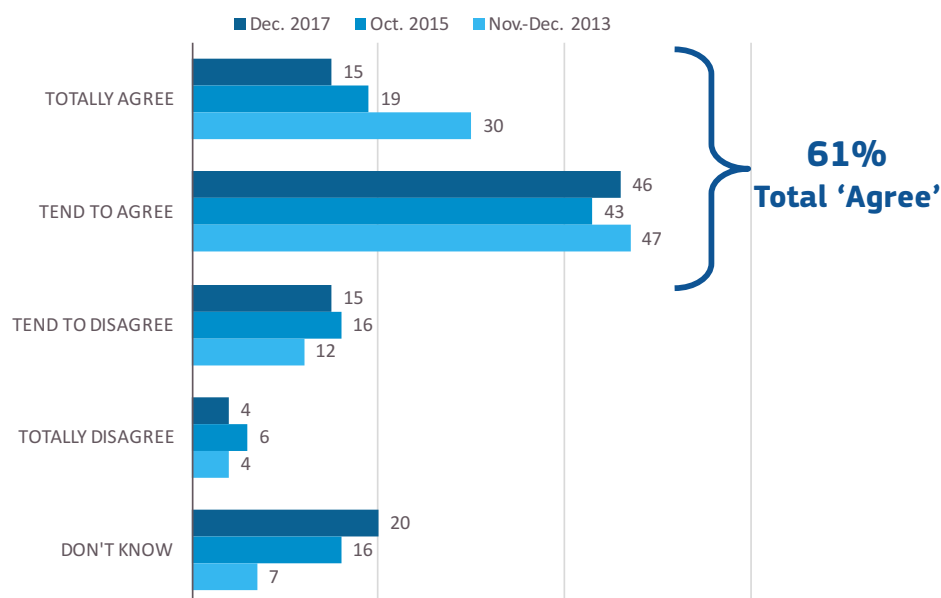
5 Does the CAP only benefit farmers?

The majority agree the CAP benefits all European citizens

More than six in ten respondents (61%) agree the CAP benefits all European citizens and not only farmers²¹. More than one in ten (15%) totally agree, while 46% tend to agree. Almost one in five (19%) disagree, with 4% saying they totally disagree. It is worth noting that one in five (20%) say they do not know.

The proportion of respondents who agree has remained fairly stable compared to 2015 (-1 pp), but is considerably lower than in 2013 (-16 pp). It is worth noting that the proportion who totally agree has been declining since 2013, while the proportion who say they don't know has been increasing.

QC3 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)



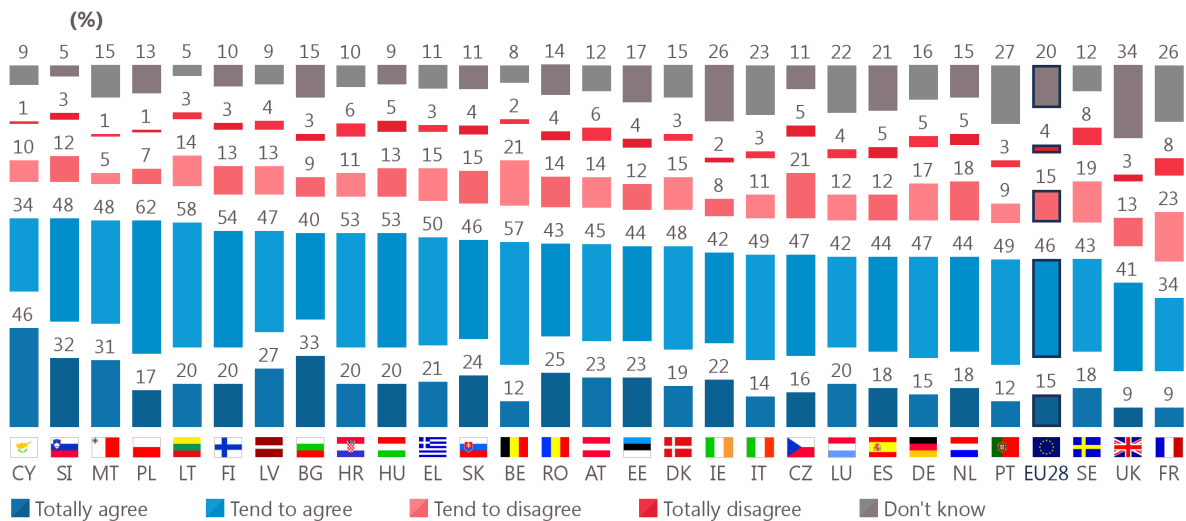
²¹ QC3 To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers. Totally agree, Tend to Agree, Tend to disagree, Totally disagree, Don't know.

There is a broad range of opinion across the EU. Eight in ten respondents in Cyprus and Slovenia (both 80%) and 79% in Malta and Poland agree the CAP benefits all European citizens and not only farmers. This compares to 43% in France, and 50% in the United Kingdom who think the same way.

Less than half in any country totally agree, with those in Cyprus (46%), Bulgaria (33%), Slovenia (32%) and Malta (31%) the most likely to do so.

In eight countries at least one in five say they don't know, with those in the United Kingdom (34%) the most likely to say this.

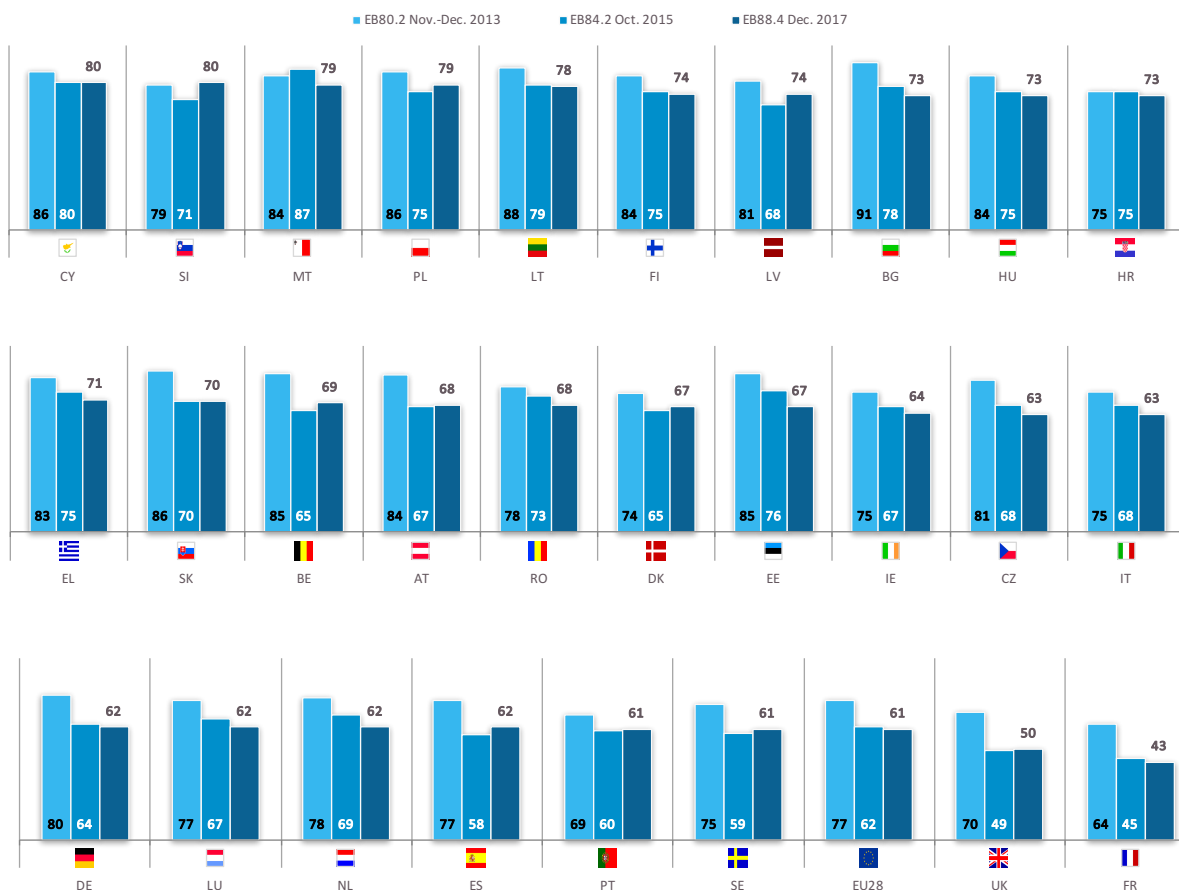
QC3 To what extent do you agree or disagree with the following statement: the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers.



Compared to 2015 respondents in Slovenia (+9 pp) and Latvia (+6 pp) are now more likely to agree the CAP benefits all citizens. In contrast those in Estonia (-9 pp), Malta (-8 pp) and the Netherlands (-7 pp) are now less likely to agree.

The longer term trend since 2013 shows agreement has declined in all but one country (Slovenia, +1 pp).

QC3 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 analysis** highlights the following:

- Those who completed their education aged 16 or older are the most likely to agree.
- Other white collar workers are the most likely to agree, particularly compared to the unemployed (69% vs 53%).
- Respondents living in large towns (66%) are more likely to agree than those in small/mid-size towns (60%) or rural villages (59%).
- Those with a positive image of the EU are more likely to agree than those with a negative view (74% vs 44%).

In addition, respondents who think agriculture and rural areas are important for the future are more likely to agree than those who think they are not important (64% vs 34%).

QC3 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'	Don't know
EU28	61	19	20
 Education (End of)			
15-	57	19	24
16-19	62	19	19
20+	64	21	15
Still studying	62	12	26
 Socio-professional category			
Self-employed	64	22	14
Managers	65	22	13
Other white collars	69	16	15
Manual workers	58	19	23
House persons	60	16	24
Unemployed	53	22	25
Retired	61	20	19
Students	62	12	26
 Subjective urbanisation			
Rural village	59	21	20
Small/ mid-size town	60	19	21
Large town	66	16	18
Image of EU			
Positive	74	13	13
Neutral	58	19	23
Negative	44	35	21
Agriculture and rural areas			
Important	64	18	18
Not important	34	53	13

III. FINANCIAL AID FOR FARMERS AND THE CAP BUDGET

This section of the report explores views about financial aid for farmers, including opinions about current and future financing levels. The reasons for the CAP's proportion of the budget are considered, and opinions about cross-compliance payments and payments for environmentally friendly practices are discussed.

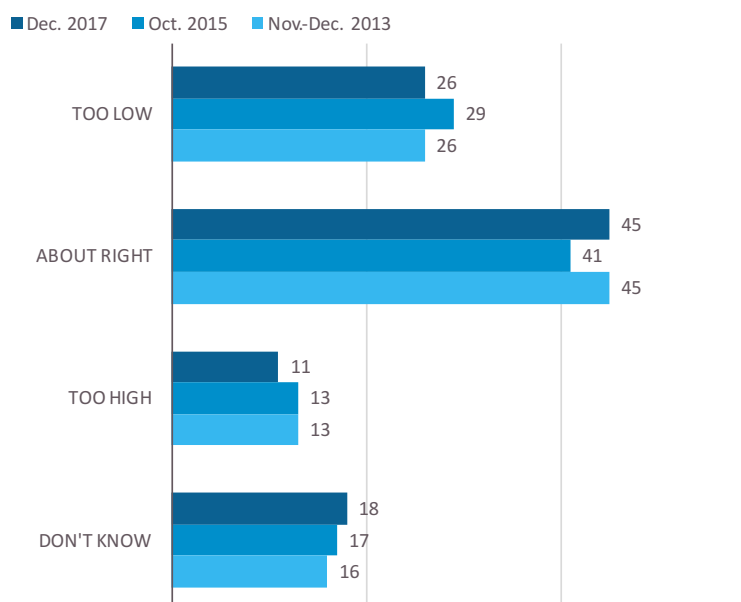
1 Financial aid for farmers

More than seven in ten want financial support for farmers to either remain the same, or be increased over the next 10 years

Respondents were asked what they thought about the level of financial support given to farmers²². More than four in ten (45%) think this support is about right. Just over one quarter (26%) say it is too low and 11% that it is too high.

Compared to 2015, respondents are more likely to think the support is about right (+4 pp) and less likely to think it is too low (-3 pp) or too high (-2 pp). Results are stable compared to 2013, apart from a two-point decline in the proportion who think support is too high.

QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% of the total EU budget. Do you think that this support is too low, about right or too high? (% - EU)



²² QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% 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.

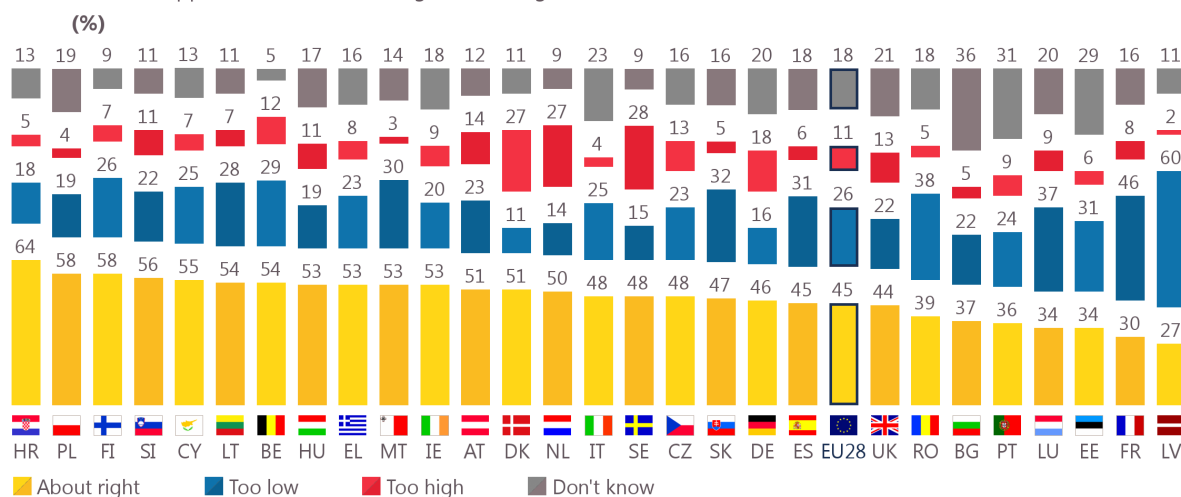
Opinions across the EU are quite varied, although at least half of all respondents in 14 Member States think support is about right. Almost two thirds in Croatia say this (64%), as do 58% in Poland and Finland and 56% in Slovenia. This compares to 27% in Latvia, 30% in France and 34% in Estonia and Luxembourg.

Latvia is the only country where more than half think support is too low (60%), although 46% in France, 38% in Romania and 37% in Luxembourg say the same. Sweden (28%), the Netherlands and Denmark (both 27%) are the only countries where more than one in five say support is too high.

It is worth noting that the level of don't know responding is high in a number of countries, particularly in Bulgaria (36%) and in Portugal (31%).

Taking a broader view, in 24 countries respondents are more likely to say financial support is too low than they are to say it is too high.

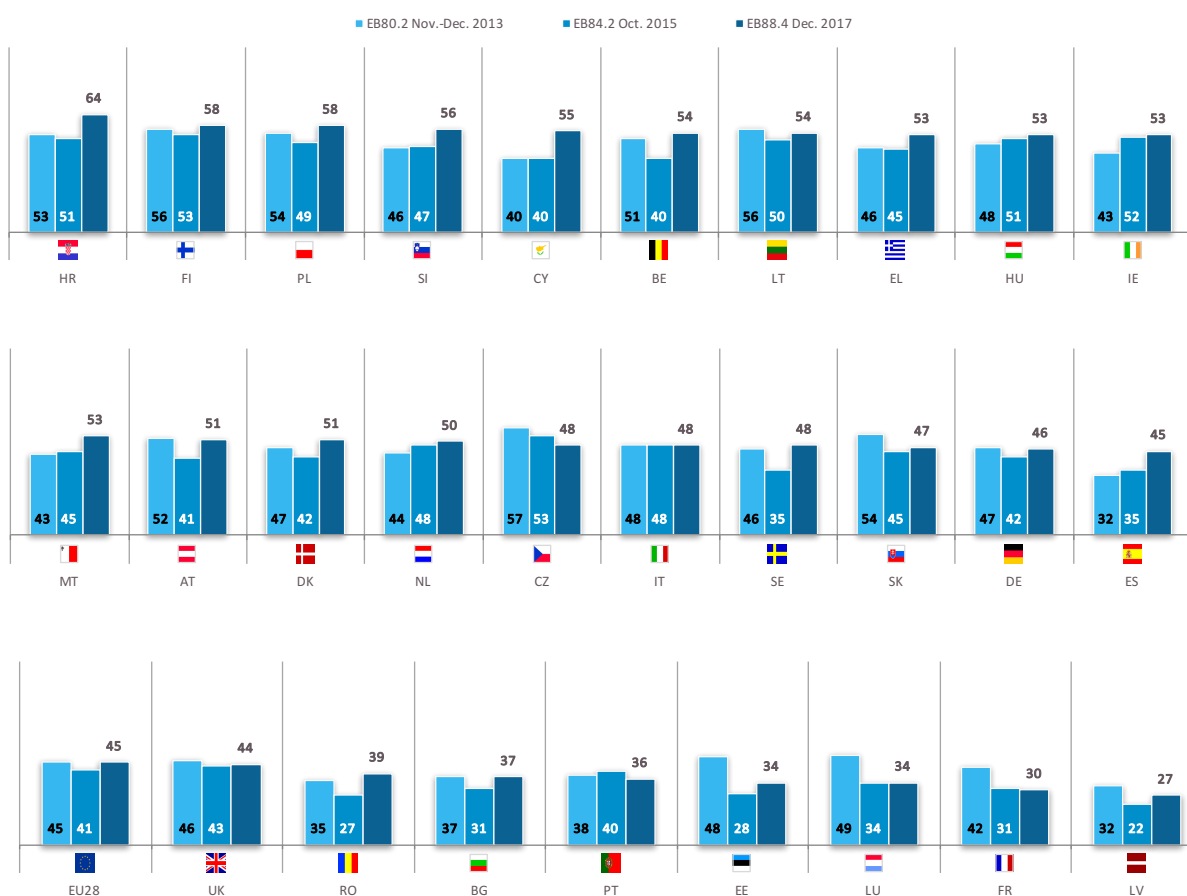
QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% of the total EU budget. Do you think that this support is too low, about right or too high?



In most countries, respondents are now more likely to say support is about right, compared to 2015. The largest increases are seen amongst respondents in Cyprus (+15 pp), Belgium (+14 pp), Croatia and Sweden (both +13 pp). The Czech Republic (-5 pp) and France (-1 pp) are the only countries where respondents are less likely to think support is about right compared to opinions in 2015.

The longer term trend since 2013 is somewhat mixed – opinion has become more positive in 15 countries, more negative in 11 countries, and has remained the same in the others.

QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% of the total EU budget. Do you think that this support is too low, about right or too high?
(% - ABOUT RIGHT)



The **socio-demographic analysis** shows no differences based on gender, age, education but does reveal the following:

- Although respondents in all occupation groups are most likely to say support is about right, other white collars are the most likely to think this way, particularly compared to the unemployed (53% vs 38%).
- Respondents in large towns are more likely to think support is about right (51%) compared to those in small/mid-sized towns (43%) or villages (44%).

In addition, respondents who think agriculture and rural areas are important are more likely to think support is about right (47% vs 41% who think these things are not important), and less likely to think support is too high (10% vs 23%).

QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% 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
EU28	26	45	11	18
Socio-professional category				
Self-employed	27	45	14	14
Managers	23	45	16	16
Other white collars	24	53	9	14
Manual workers	30	44	8	18
House persons	28	45	7	20
Unemployed	32	38	11	19
Retired	22	44	12	22
Students	25	47	8	20
Subjective urbanisation				
Rural village	25	44	11	20
Small/ mid-size town	28	43	10	19
Large town	22	51	11	16
Agriculture and rural areas				
Important	26	47	10	17
Not important	23	41	23	13

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

Financial aid to farmers to ensure sustainable farming is considered to be the main reason for the CAP's budget

Respondents were asked what they think are the main reasons why the EU spends a significant proportion of its budget on the CAP²³.

Three in ten (30%) say financial aid to farmers makes it possible to ensure sustainable farming²⁴, while 28% say financial aid to farmers makes it possible to guarantee the food supply of Europeans, or that agriculture requires heavy human and financial investments. Almost one quarter (24%) say the production of food products in the EU is more expensive than in other countries, because of stricter standards.

One in five say one of the main reasons is addressing the environment and climate change issues in rural areas (20%), while 14% say agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level. Almost as many (13%) say they don't know.

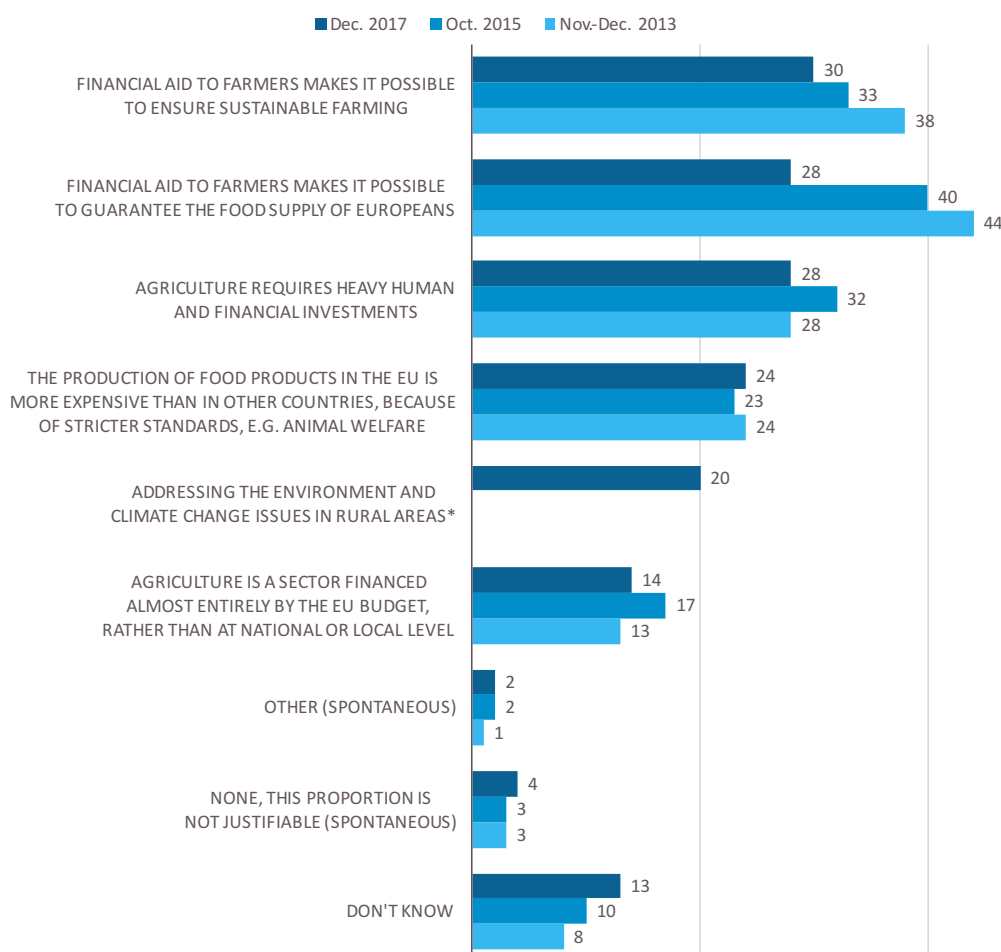
The proportion of respondents mentioning each reason has declined since 2015, with the exception of **food production being more expensive in the EU** (+1 pp). In particular, respondents are now much less likely to mention **financial aid to farmers makes it possible to guarantee the food supply of Europeans** (-12 pp). When interpreting the trend results it is important to note that for this wave of the survey there was a new response option. As respondents were only able to pick a maximum of two answers this may have had an impact on the results.

The longer term trend since 2013 shows the proportion mentioning each reason has remained stable, with two exceptions. The proportion who mention **financial aid to farmers makes it possible to guarantee the food supply of Europeans** has declined by 16 pp, and there has been an eight-point decline in the proportion who mention **financial aid to farmers makes it possible to ensure sustainable farming**.

²³ QC10 What do you think are the main reasons why the EU spends a significant proportion of its budget (almost 40% 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.

²⁴ The wording of this option has changes slightly since the previous survey when it was financial aid to farmers makes it possible to ensure the sustainable production of food products. Trends should be interpreted with caution.

QC10 What do you think are the main reasons why the EU spends a significant proportion of its budget (almost 40% of the total EU budget) on the Common Agricultural Policy (CAP)?
(MAX. 2 ANSWERS)
(% - EU)



At least one quarter of respondents in each country say the fact that **financial aid to farmers makes it possible to ensure sustainable farming** is one of the main reasons for the CAP's budget. Proportions range from 43% in Cyprus and 42% in Latvia and Finland, to 26% in Bulgaria and 28% in the United Kingdom, Italy, France and Germany.

Respondents in the Netherlands (40%), Finland (39%) and Sweden (38%) are the most likely to mention **financial aid to farmers makes it possible to guarantee the food supply of Europeans**, while those in Estonia (20%), France (23%), Italy and Cyprus (both 25%) are the least likely to do so.

More than four in ten respondents in Bulgaria (43%) and Lithuania (42%) and 38% in Slovenia say the fact that **agriculture requires heavy human and financial investments** explains the budget. At the other end of the scale, 16% in the Netherlands and 17% in the United Kingdom and Germany say the same.

The production of food products in the EU is more expensive than in other countries, because of stricter standards is most likely to be given as a reason by respondents in the Netherlands (36%), Belgium, Denmark and Sweden (all 34%), but is least likely to be mentioned by those in Portugal (14%), Italy (17%) and Spain (18%).

Respondents in Cyprus (31%) Austria and Italy (both 26%) are the most likely to mention **addressing the environment and climate change issues in rural areas**, compared to 9% in Estonia, and 10% in the United Kingdom and Portugal.

Finally, at least one in five respondents in Sweden (23%), Ireland, Lithuania (both 21%) and Austria (20%) say **agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level**, compared to 7% in the United Kingdom and 9% in Portugal and Estonia.

Broadly speaking, in most countries respondents are generally less likely to mention each of these reasons than they were in 2015. However, when interpreting the trend results it is important to remember that an additional response option (environment and climate change) was offered in this wave, and respondents were only able to pick a maximum of two answers. This may have had an impact on the trend results.

In 23 countries, respondents are now less likely to say the fact that **financial aid to farmers makes it possible to ensure sustainable farming** is one of the main reasons for the CAP's budget, with the largest declines seen amongst those in Austria (-12 pp), Croatia (-11 pp) and Malta (-10 pp). The largest increases are observed amongst those in the UK (+6 pp) and in Latvia (+5 pp).





























In all 28 EU Member States, respondents are now less likely to say **financial aid to farmers makes it possible to guarantee the food supply of Europeans** is a reason for the budget. The largest declines are seen amongst those in the United Kingdom (-27 pp), Croatia, Ireland (both -17 pp) and Poland (-16 pp).

In 20 countries respondents are less likely to mention **agriculture requires heavy human and financial investments** as a reason, and this is particularly the case in the United Kingdom, Portugal (both -13 pp) Malta (-11 pp) and Cyprus (-10 pp). Respondents in Slovenia, on the other hand, are now more likely to mention this (+7 pp).

Respondents in Greece and Ireland (both +9 pp) are now more likely to mention **the production of food products in the EU is more expensive than in other countries, because of stricter standards**, while those in France and Finland are less likely to do so (both -7 pp).

In 21 EU Member States respondents are now less likely to say **agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level**, with the largest decrease seen in the United Kingdom (-11 pp). On the other hand, respondents in Malta and Italy are now more likely to mention this reason than they were in 2015 (both +3 p).

QC10 What do you think are the main reasons why the EU spends a significant proportion of its budget (almost 40% of the total EU budget) on the Common Agricultural Policy (CAP)?
(MAX. 2 ANSWERS)
(%)


		Financial aid to farmers makes it possible to ensure sustainable farming	2017 - 2015	Financial aid to farmers makes it possible to guarantee the food supply of Europeans	2017 - 2015	Agriculture requires heavy human and financial investments	2017 - 2015	The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare	2017 - 2015	Addressing the environment and climate change issues in rural areas*	Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level	2017 - 2015
EU28		30	▼ 3	28	▼ 12	28	▼ 4	24	▲ 1	20	14	▼ 3
BE		32	▲ 1	30	▼ 13	34	▼ 4	34	▼ 1	21	14	▼ 3
BG		26	▼ 3	26	▼ 5	43	▼ 1	20	▲ 4	14	17	▼ 4
CZ		37	▼ 6	32	▼ 6	29	▲ 1	30	▲ 5	15	12	▼ 3
DK		33	▼ 4	37	▼ 7	21	▲ 1	34	▼ 4	18	17	▼ 4
DE		28	▼ 8	29	▼ 8	17	▼ 5	27	▲ 1	25	15	▼ 3
EE		37	▼ 2	20	▼ 7	32	▼ 6	23	▼ 1	9	9	▼ 4
IE		33	▼ 7	35	▼ 17	25	▲ 2	28	▲ 9	15	21	▼ 1
EL		36	▼ 9	30	▼ 14	36	▼ 3	24	▲ 9	21	19	▼ 3
ES		33	▲ 2	32	▼ 10	32	▼ 6	18	▲ 3	23	15	▼ 6
FR		28	▼ 5	23	▼ 5	37	▼ 2	31	▼ 7	22	13	▼ 2
HR		30	▼ 11	29	▼ 17	30	▼ 4	20	▲ 8	17	16	▼ 5
IT		28	▼ 1	25	▼ 8	34	▼ 5	17	▼ 1	26	15	▲ 3
CY		43	▼ 7	25	▼ 12	31	▼ 10	21	▲ 5	31	16	▼ 4
LV		42	▲ 5	28	▼ 3	28	▼ 6	20	▼ 2	13	15	▼ 1
LT		34	▼ 2	27	▼ 7	42	▲ 1	22	▼ 1	11	21	▼ 2
LU		34	▼ 1	27	▼ 9	33	▼ 7	32	▼ 1	17	10	▼ 6
HU		29	▼ 1	28	▼ 12	37	▼ 3	25	▼ 1	22	16	=
MT		31	▼ 10	28	▼ 10	29	▼ 11	23	▼ 2	23	16	▲ 3
NL		35	▼ 8	40	▼ 9	16	▲ 2	36	▼ 6	25	16	▲ 1
AT		34	▼ 12	30	▼ 12	18	=	32	▲ 1	26	20	▲ 1
PL		31	▼ 5	29	▼ 16	31	▼ 1	21	▲ 2	20	14	▼ 1
PT		31	▼ 6	37	▼ 6	25	▼ 13	14	▲ 2	10	9	▼ 7
RO		30	▼ 6	30	▼ 7	31	▼ 5	19	▲ 2	18	17	▼ 4
SI		30	▲ 1	28	▼ 1	38	▲ 7	22	=	12	12	▼ 7
SK		31	▼ 7	27	▼ 5	33	▼ 8	23	▼ 5	15	17	=
FI		42	▼ 2	39	▼ 11	29	▲ 2	28	▼ 7	13	13	▼ 4
SE		35	▼ 7	38	▼ 1	18	▼ 4	34	▼ 3	19	23	▲ 1
UK		28	▲ 6	26	▼ 27	17	▼ 13	19	▲ 7	10	7	▼ 11

The **socio-demographic analysis** shows no differences based on age, gender, occupation or urbanisation. It does, however, highlight the following:

- The longer a respondent remained in education, the more likely they are to mention **agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level**, or the **production of food products in the EU is more expensive than in other countries, because of stricter standards**. For instance, 28% of those who completed their education aged 20+ mention food production being more expensive in the EU, compared to 18% who completed their education aged 15 or younger.
- Respondents with a positive image of the EU are more likely to mention **financial aid to farmers makes it possible to guarantee the food supply of Europeans** (32% vs 23% with a negative image), or **financial aid to farmers makes it possible to ensure sustainable farming** (34% vs 26%).

In addition, respondents who think agriculture and rural areas are important are more likely to mention **financial aid to farmers makes it possible to guarantee the food supply of Europeans** (30% vs 21% who say these things are not important), **agriculture requires heavy human and financial investments** (28% vs 21%), or **financial aid to farmers makes it possible to ensure sustainable farming** (31% vs 22%). Respondents who think the CAP benefits all Europeans are also more likely to mention these three reasons, compared to those who think it does not. The same pattern also applies comparing those who think aid to farmers should increase to those who think it should decrease. Those who think aid to farmers should increase are also more likely to mention **addressing the environment and climate change issues in rural areas** (22% vs 16%).

QC10 What do you think are the main reasons why the EU spends a significant proportion of its budget (almost 40% of the total EU budget) on the Common Agricultural Policy (CAP)? (MAX. 2 ANSWERS) (% - EU)

	Financial aid to farmers makes it possible to ensure sustainable farming	Financial aid to farmers makes it possible to guarantee the food supply of Europeans	Agriculture requires heavy human and financial investments	The production of food products in the EU is more expensive than in other countries, because of stricter	Addressing the environment and climate change issues in rural areas	Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level
EU28	30	28	28	24	20	14
 Education (End of)						
15-	27	29	28	18	17	11
16-19	31	28	28	23	21	13
20+	32	29	27	28	20	17
Still studying	29	29	26	29	25	12
Image of EU						
Positive	34	32	28	26	22	16
Neutral	30	28	27	23	20	13
Negative	26	23	27	23	18	14
Agriculture and rural areas						
Important	31	30	28	25	21	14
Not important	22	21	21	23	19	14
CAP benefits all European citizens						
Agree	35	33	30	26	23	15
Disagree	24	24	26	26	19	18
EU aid to famers should...						
Increase	36	31	34	24	22	12
Decrease	18	23	17	26	16	23
No change	34	32	27	27	22	16

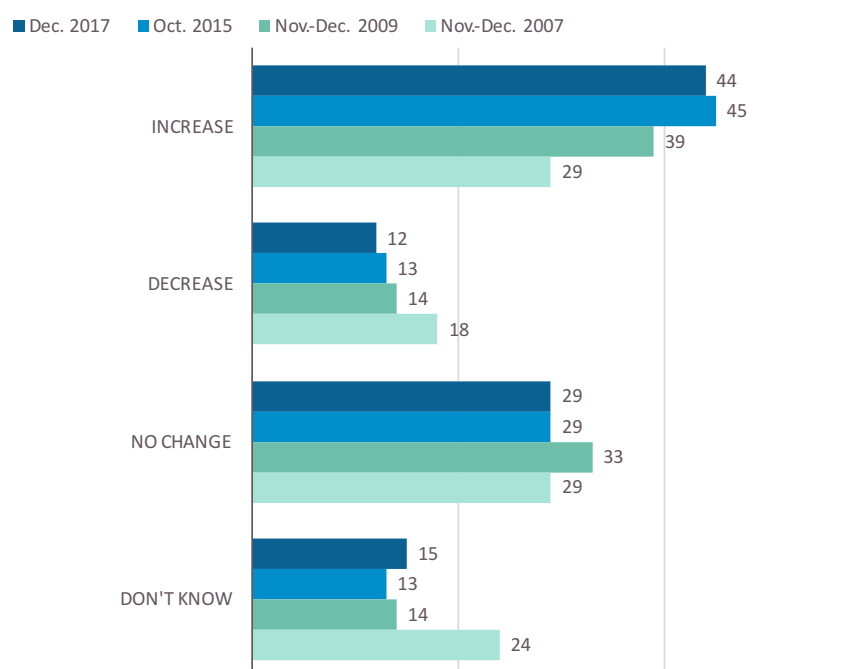
3 Future financial support to farmers

Respondents are most likely to want an increase in EU financial support for farmers

More than four in ten respondents (44%) want to see an increase in EU financial support to farmers over the next 10 years²⁵. Just over one in ten (12%) want to see a decrease while 29% want no change. More than one in ten (15%) say they don't know.

Compared to 2015 there has been little change. The longer term trend since 2007, however, shows an increase in the proportion who want funding to increase (+15 pp) and a decline in the proportion who want funding to decrease (-6 pp). The proportion who want no change has remained stable.

QC11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?
(% - EU)



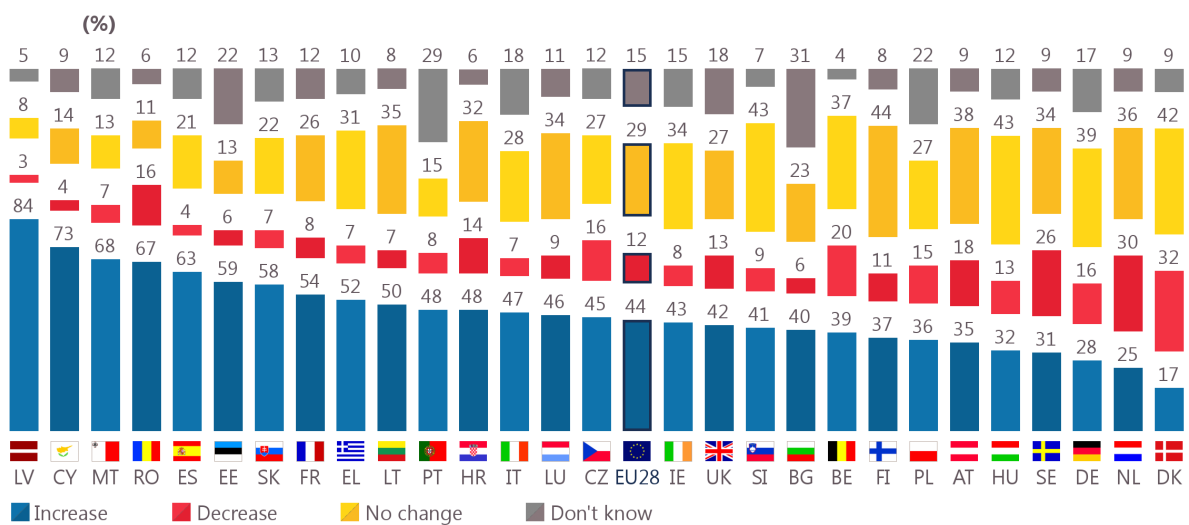
²⁵ QC11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers? Increase; Decrease; No change; Don't know.

There is a wide range of opinions across the EU Member States, although in 20 countries respondents are most likely to say funding should increase. More than eight in ten in Latvia think this way (84%) as do 73% in Cyprus and 68% in Malta. This compares to 17% in Denmark, 25% in the Netherlands and 28% in Germany.

There are four countries where at least one in five think funding should decrease: Denmark (32%), the Netherlands (30%), Sweden (26%) and Belgium (20%).

There are eight countries where respondents are most likely to say funding should stay the same, with those in Finland (44%), Hungary, Slovenia (both 43%) and Denmark (42%) the most likely to say this.

QC11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?



Compared to 2015, respondents in 21 countries are now less likely to say EU financial support to farmers should increase over the next 10 years, with the largest decreases seen amongst those in Romania (-17 pp), Croatia (-13 pp) and Greece and Bulgaria (both -12 pp). In contrast respondents in France (+9 pp) and Italy (+6 pp) are now more likely to say support should increase.

The opposite trend is observed over the longer term since November 2007²⁶, with respondents in 24 countries more likely to say aid should increase than they were at that time. The largest increases are seen amongst respondents in Malta (+39 pp), France (+31 pp) and Cyprus (+30 pp).

QC11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers?
(% - INCREASE)







²⁶ Croatia is not included in 2007 as it was not part of the EU at that time.

The **socio-demographic analysis** highlights that across all demographic groups respondents are most likely to say aid should increase. There are, however, some notable differences within groups:

- Respondents aged 39 or younger are the most likely to say aid should increase: 46% of those aged 15-24 do so, compared to 41% of those aged 55+.
- Respondents who completed their education aged 19 or younger are more likely to say aid should increase, compared to those who completed education aged 20+ (46% vs 40%).
- House persons and the unemployed (both 50%) are the most likely to say aid should increase, particularly compared to retired persons (41%).
- The more difficulties a respondent experiences paying household bills, the more likely they are to think aid should increase.

In addition, respondents who think agriculture and rural areas are important are more likely to say aid should increase (45% vs 31% who say these are not important). Finally, respondents who think the CAP benefits all European citizens are more likely to think aid should increase, compared to those who say it does not (47% vs 38%). Those who say the CAP does not benefit all Europeans are more likely to say aid should decrease (24% vs 10%).

QC11 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
EU28	44	12	29	15
 Age				
15-24	46	9	28	17
25-39	47	11	28	14
40-54	44	14	29	13
55 +	41	13	30	16
 Education (End of)				
15-	46	10	27	17
16-19	46	12	28	14
20+	40	15	32	13
Still studying	44	8	30	18
 Socio-professional category				
Self-employed	45	15	28	12
Managers	36	17	33	14
Other white collars	44	13	31	12
Manual workers	47	12	26	15
House persons	50	8	27	15
Unemployed	50	9	26	15
Retired	41	12	31	16
Students	44	8	30	18
 Difficulties paying bills				
Most of the time	55	9	21	15
From time to time	47	12	28	13
Almost never/ Never	41	13	31	15
Agriculture and rural areas				
Important	45	11	30	14
Not important	31	30	29	10
CAP benefits all European citizens				
Agree	47	10	33	10
Disagree	38	24	27	11

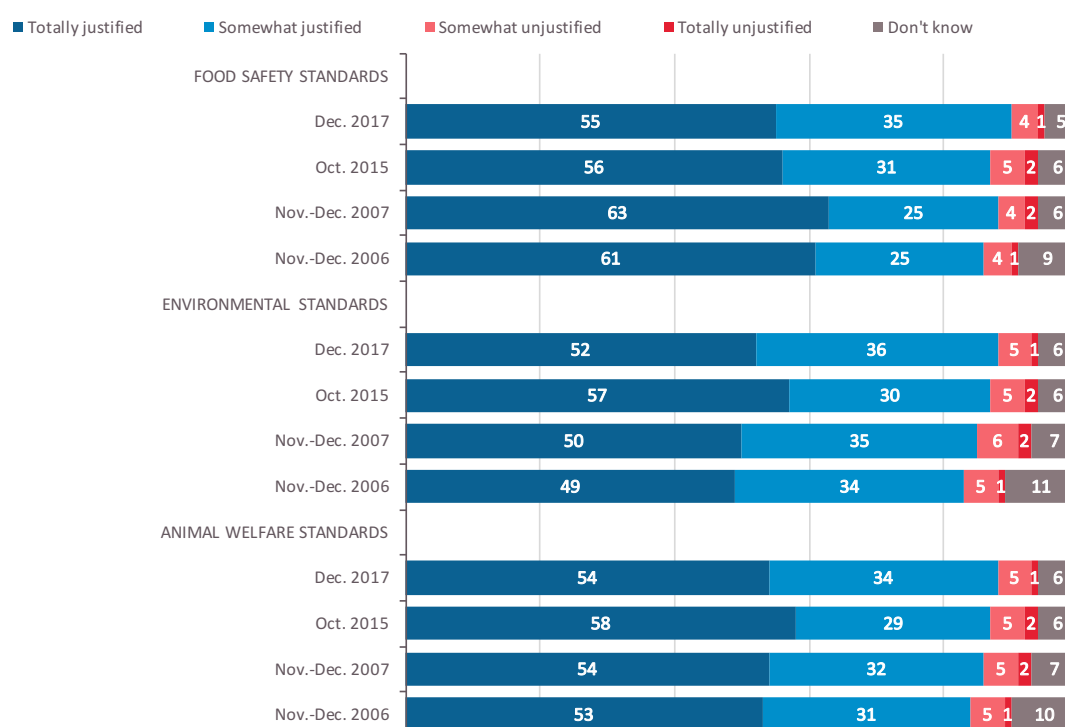
4 Opinions on the “cross-compliance” mechanism

Large majorities think it is justified to reduce subsidy payments to farmers who don't respect food safety, environmental or animal welfare standards.

The majority of respondents think it is justified to reduce subsidy payments to farmers who do not respect food safety standards (90%)²⁷. In fact, 55% totally agree. Almost as many respondents (88%) agree reducing subsidy payments because environmental standards are not respected is justified: 52% totally agree and 36% tend to agree. The same proportion of respondents (88%) agree it is justified to reduce subsidy payments to farmers who do not respect animal welfare standards: 54% totally agree and 34% tend to agree.

Changes in opinion since 2015 are generally small. There has been a three-point increase in the proportion who agree when it comes to food safety standards, a one-point increase in relation to environmental standards and animal welfare standards. In the case of environmental standards and animal welfare standards there have been declines in the proportions who totally agree and increases in the proportions who tend to agree.

QC17 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?
(% - EU)

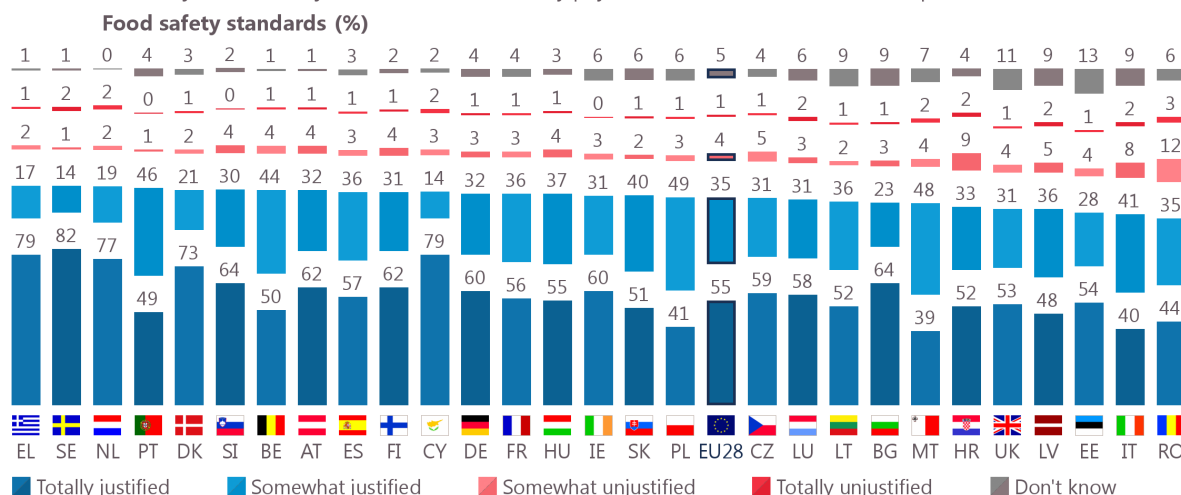


²⁷ QC17. Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...? Food Safety Standards; Animal Welfare Standards; Environmental Standards. Totally justified; Somewhat justified; Somewhat unjustified; Totally unjustified; Don't know.

In each country, more than three quarters of respondents agree it is justified to reduce subsidies if farmers don't respect food safety standards. In fact, in 18 countries at least nine in ten agree. Proportions range from 96% in Greece, the Netherlands and Sweden to 79% in Romania, 81% in Italy and 82% in Estonia.

In 22 countries, at least half of all respondents think this is totally justified, with the highest proportions in Sweden (82%), Cyprus and Greece (both 79%).

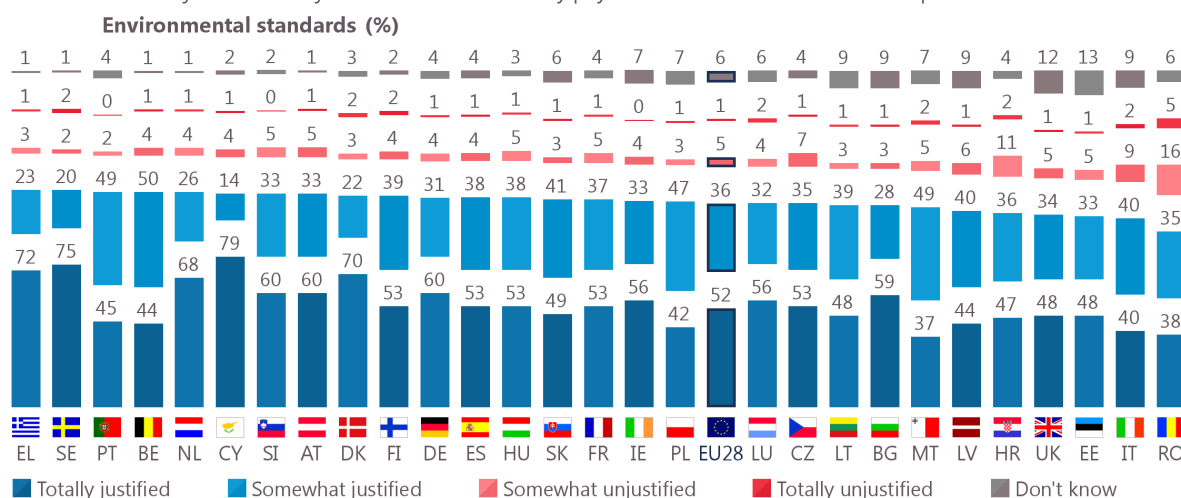
QC17.1 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?



Large majorities in each country also agree with reducing subsidies if environmental standards are not respected, with proportions ranging from 95% in Greece and Sweden and 94% in Belgium, the Netherlands and Portugal to 73% in Romania, 80% in Italy and 81% in Estonia.

At least seven in ten respondents in Cyprus (79%), Sweden (75%), Greece (72%) and Denmark (70%) think this is totally justified – and in 16 countries the majority thinks this way.

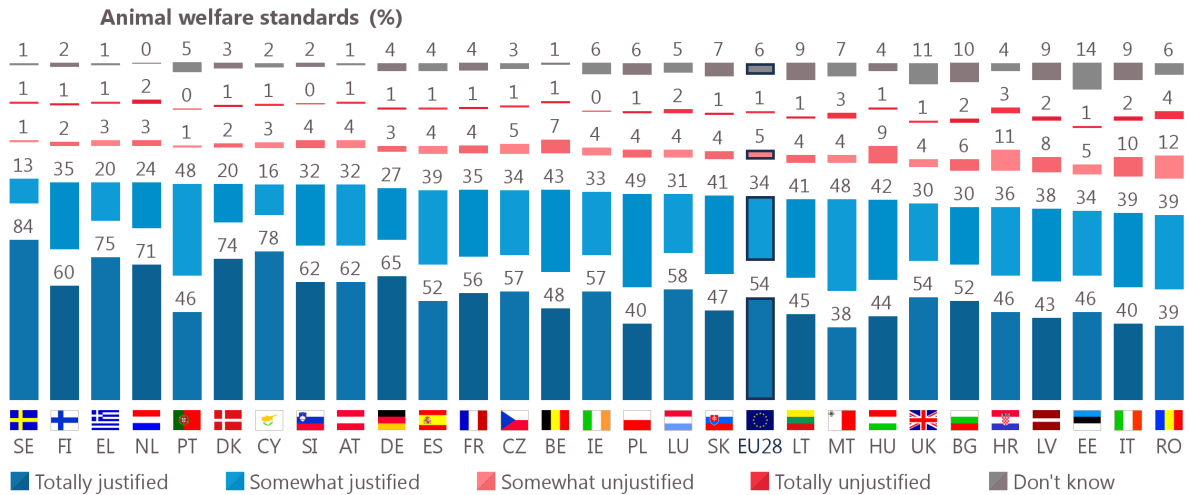
QC17.3 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?



More than three quarters of respondents in each country agree with reducing subsidies for not respecting animal welfare, with proportions ranging from 97% in Sweden and 95% in Greece, the Netherlands and Finland to 78% in Romania, 79% in Italy and 80% in Estonia.

More than eight in ten respondents in Sweden (84%) totally agree, as do 78% in Cyprus and 75% in Greece.

QC17.2 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?



Changes in opinion since 2015 have generally been small – in fact in all three areas the largest increase in agreement is observed amongst respondents in Spain: +14 pp for food safety standards, +11 pp for environmental standards and +10 pp for animal welfare standards.

QC17 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...? (% - TOTAL 'JUSTIFIED')

		Food safety standards		Environmental standards		Animal welfare standards	
		2017	2017 - 2015	2017	2017 - 2015	2017	2017 - 2015
EU28		90	▲ 3	88	▲ 1	88	▲ 1
BE		94	▲ 3	94	▲ 5	91	▲ 4
BG		87	▼ 3	87	▼ 2	82	▲ 2
CZ		90	=	88	▼ 1	91	▲ 1
DK		94	▲ 1	92	▼ 1	94	▲ 1
DE		92	▲ 3	91	▼ 1	92	▲ 1
EE		82	▼ 1	81	▼ 1	80	▼ 1
IE		91	=	89	=	90	▲ 1
EL		96	▲ 3	95	▲ 1	95	▲ 2
ES		93	▲ 14	91	▲ 11	91	▲ 10
FR		92	▲ 3	90	=	91	▲ 2
HR		85	=	83	▼ 2	82	▼ 6
IT		81	▲ 1	80	▲ 2	79	▲ 1
CY		93	=	93	▲ 2	94	▲ 1
LV		84	▲ 3	84	▼ 1	81	▲ 1
LT		88	=	87	▼ 1	86	▲ 3
LU		89	▼ 4	88	▼ 6	89	▼ 5
HU		92	▼ 2	91	▼ 3	86	▼ 3
MT		87	▼ 2	86	▼ 3	86	▼ 3
NL		96	=	94	=	95	=
AT		94	▲ 3	93	▲ 7	94	▲ 5
PL		90	▲ 1	89	▲ 1	89	▼ 1
PT		95	▲ 4	94	▲ 5	94	▲ 5
RO		79	=	73	▼ 4	78	▲ 4
SI		94	▲ 5	93	▲ 5	94	▲ 6
SK		91	▲ 1	90	▲ 2	88	▲ 1
FI		93	▼ 2	92	▼ 3	95	=
SE		96	▲ 1	95	▲ 1	97	▲ 2
UK		84	▼ 2	82	▼ 5	84	▼ 4

Increases by 3 pp or more

Decreases by 3 pp or more

Given the high level of agreement, it is perhaps not surprising there are no **socio-demographic** differences based on age, gender, education, occupation or urbanisation. The only notable difference is that respondents who think agriculture and rural areas are important are more likely to say reducing subsidies in each case is justified. For example, 90% say this in relation to environmental standards, compared to 74% who think agriculture rural areas are not important.

QC17 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?

Total 'Justified' (% - EU)

	Food safety standards	Animal welfare standards	Environmental standards
EU28	90	88	88
Agriculture and rural areas			
Important	91	91	90
Not important	79	76	74

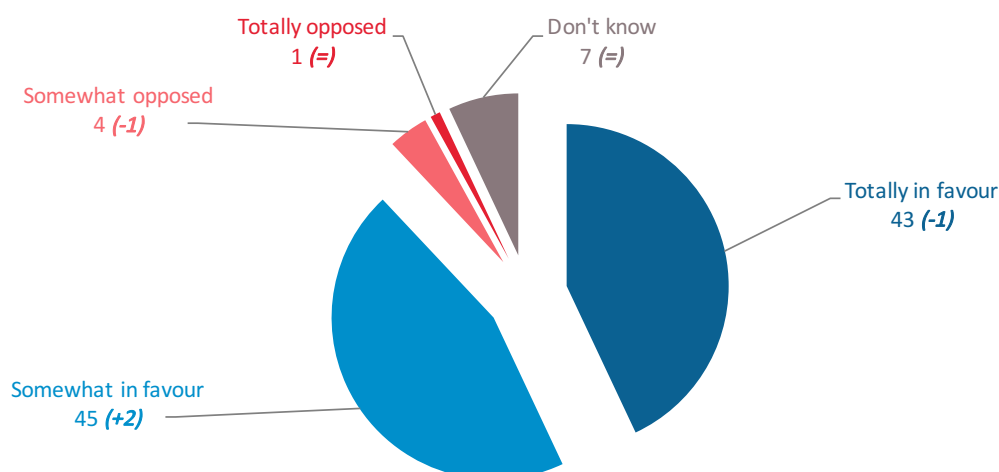
5 Opinions on payments given to farmers for implementing environmentally-friendly practices

A large majority are in favour of subsidies to farmers for implementing environmentally friendly practices

Almost nine in ten (88%) are in favour of the EU making subsidy payments to farmers for farming practices that are beneficial to the climate and the environment²⁸. More than four in ten (43%) are totally in favour, while 45% are somewhat in favour. Just 5% are opposed and 7% say they don't know.

There has been little change since 2015²⁹.

QC18 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)



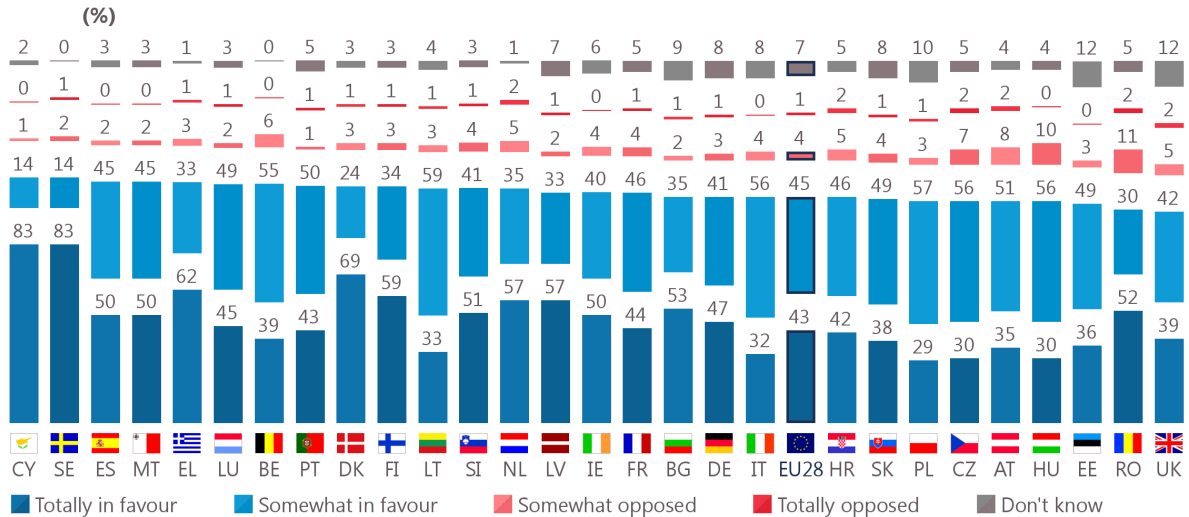
(Dec. 2017 - Oct. 2015)

²⁸ QC18. 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.

²⁹ The wording of the question has changed since the last survey, when it was "The EU is currently giving payments to farmers for carrying out agricultural practices beneficial to the climate and the environment (so called "greening"), such as crop diversification and maintenance of permanent grassland. Are you in favour or opposed to the EU continuing to do so?" The trend result should therefore be interpreted with caution.






























In each country, more than eight in ten are in favour of continuing subsidies for environmentally friendly practices. Proportions range from 97% in Cyprus and Sweden and 95% in Greece, Spain and Malta to 81% in the United Kingdom, 82% in Romania and 85% in Estonia. In fact, in Cyprus and Sweden 83% are totally in favour.

QC18 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?



There have been relatively small changes in opinion since 2015. The largest increases in the proportion in favour of continuing these subsidies is seen amongst respondents in Greece (+8 pp), Slovenia and Germany (both +7 pp), while the largest declines are seen amongst respondents in Romania (-8 pp).

QC18 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?
(%)

		Total 'In favour'	2017 - 2015	Total 'Opposed'	2017 - 2015	Don't know
EU28		88	▲ 1	5	▼ 1	7
EL		95	▲ 8	4	▼ 3	1
SI		92	▲ 7	5	▼ 5	3
DE		88	▲ 7	4	▼ 6	8
ES		95	▲ 5	2	▼ 2	3
CY		97	▲ 4	1	▼ 3	2
BE		94	▲ 3	6	▼ 1	0
DK		93	▲ 3	4	▼ 3	3
PT		93	▲ 3	2	▼ 5	5
FI		93	▲ 3	4	▼ 2	3
AT		86	▲ 3	10	▼ 2	4
LU		94	▲ 2	3	▼ 1	3
IE		90	▲ 2	4	▼ 1	6
FR		90	▲ 2	5	=	5
PL		86	▲ 2	4	▼ 3	10
SE		97	▲ 1	3	=	0
MT		95	▲ 1	2	▲ 1	3
LT		92	▲ 1	4	=	4
NL		92	=	7	▲ 1	1
LV		90	=	3	▼ 1	7
BG		88	=	3	=	9
SK		87	=	5	▼ 1	8
HR		88	▼ 2	7	▲ 1	5
IT		88	▼ 2	4	=	8
CZ		86	▼ 3	9	▲ 4	5
UK		81	▼ 3	7	=	12
EE		85	▼ 4	3	▼ 1	12
HU		86	▼ 5	10	▲ 3	4
RO		82	▼ 8	13	▲ 10	5

Increases by 3 pp or more


Decreases by 3 pp or more

Highlights from the **socio-demographic analysis** include:

- The longer a respondent remained in education, the more likely they are to be in favour of these subsidies continuing: 92% of those who completed education aged 20+ are in favour, compared to 84% of those who completed education aged 15 or younger.

In addition, respondents who think agriculture and rural areas are important for the future are much more likely to be in favour of subsidies continuing: 91% who think these things are important are in favour of subsidies continuing, compared to 68% who think agriculture and rural areas are not important. The same pattern applies comparing those who think the CAP benefits all citizens to those who think it does not, and those who think EU aid to farmers should increase with those who think it should decrease.

QC18 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)

	Total 'In favour'	Total 'Opposed'	Don't know
EU28	88	5	7
 Education (End of)			
15-	84	7	9
16-19	88	5	7
20+	92	4	4
Still studying	88	4	8
Agriculture and rural areas			
Important	91	4	5
Not important	68	24	8
CAP benefits all European citizens			
Agree	94	3	3
Disagree	82	13	5
EU aid to famers should...			
Increase	94	3	3
Decrease	78	18	4
No change	91	5	4

IV. PURCHASING DECISIONS, QUALITY LABELS AND THE AGRI-FOOD SECTOR

This section of the report reviews the factors that influence food product purchases, including the awareness and influence of quality labels on purchasing behaviour. Attitudes towards organic products will also be considered. Finally, respondents' priorities for research and innovation in the agri-food sector will be discussed.

1 Factors influencing Europeans' food products purchases

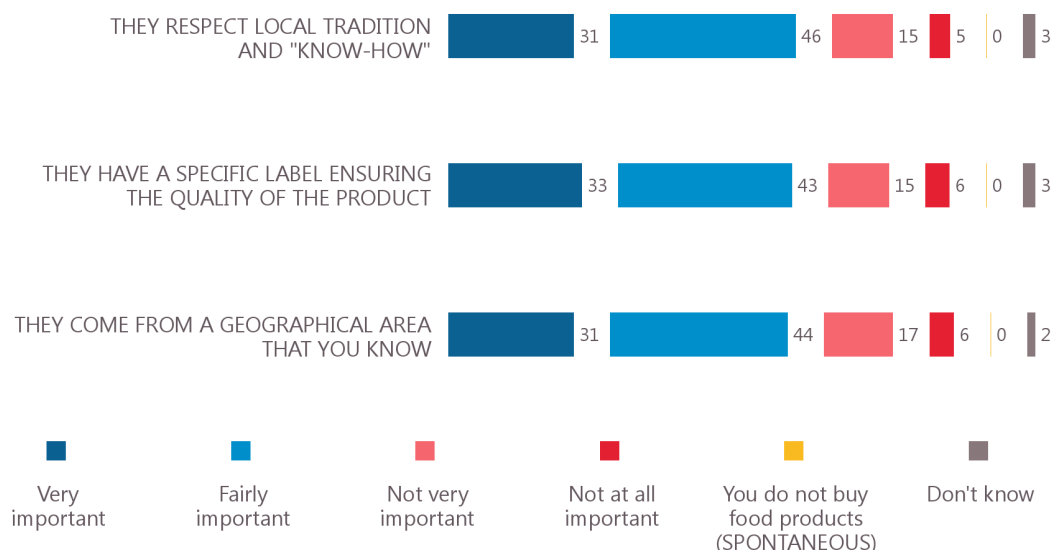
At least three quarters say respect for local traditions, specific quality labelling and a known geographic area are important when purchasing food products

A large majority (77%) say that a respect for local tradition and "know-how" is an important factor in their decision to buy food products³⁰. More than three in ten say this is very important (31%) and 46% say it is fairly important. One in five (20%) say this is not important.

Almost as many (76%) say that having a specific label ensuring quality is important, with 33% saying this is very important and 43% that it is fairly important. Just over one in five (21%) say this is not important.

Three quarters (75%) say that coming from a known geographic area is important in their decision to buy food products. Just over three in ten (31%) say this is very important and 44% say it is fairly important. Almost one quarter (23%) say this is not important.

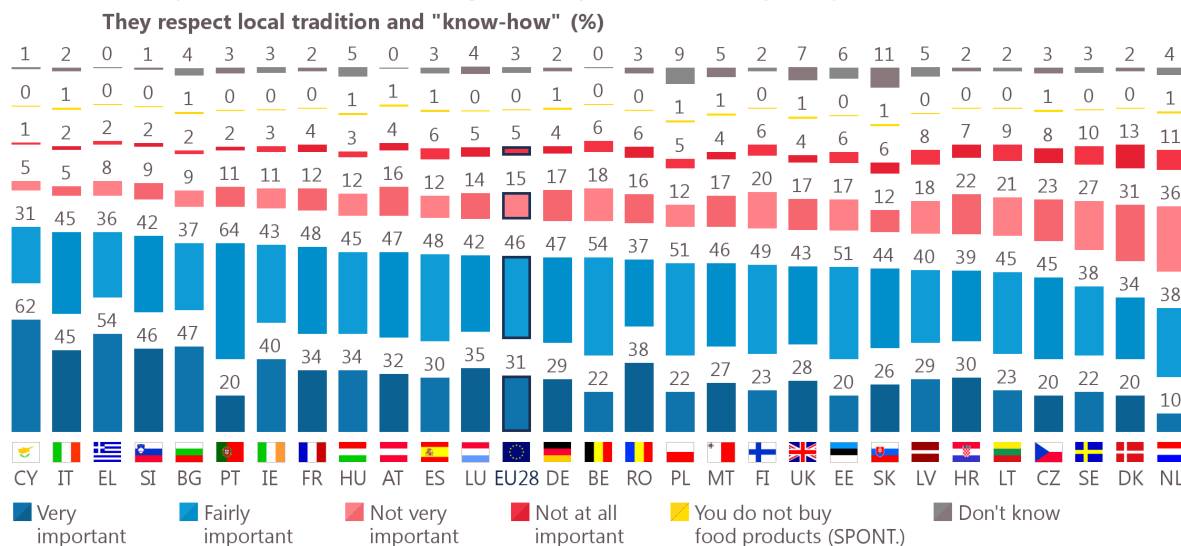
QC13 How important or not are the following factors in your decision to buy food products?
(% - EU)



³⁰ QC13 How important or not are the following factors in your decision to buy food products? 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. Very important; Fairly important; Not very important; Not at all important; You do not buy food products (SPONTANEOUS); Don't know.

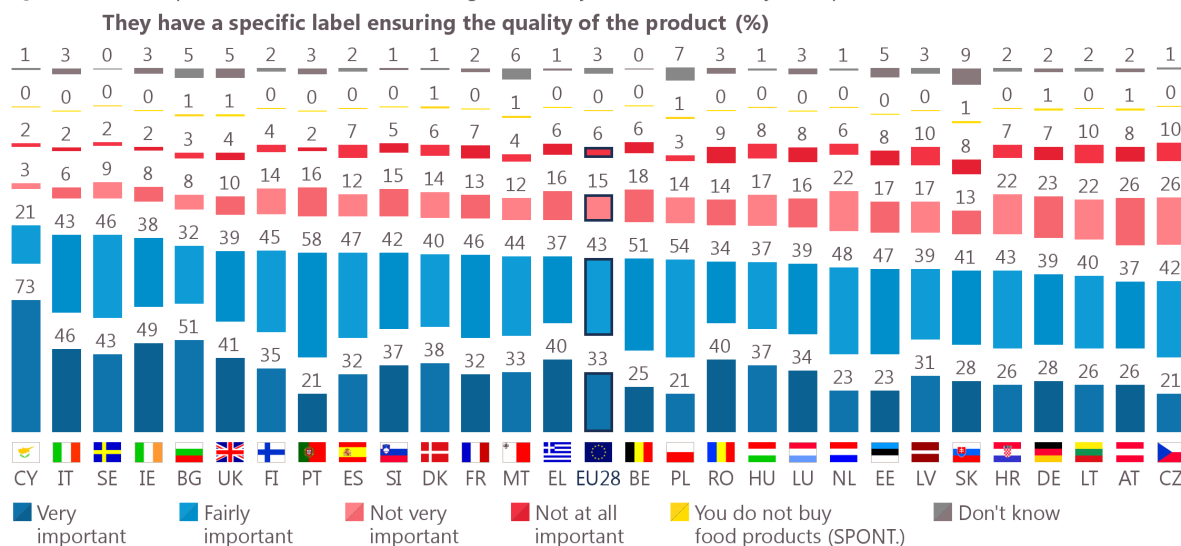
Respect for local tradition and “know-how” varies in importance across the EU. It is an important factor for 93% of respondents in Cyprus, 90% in Greece and Italy and 88% in Slovenia, compared to 48% in the Netherlands, 54% in Denmark and 60% in Sweden. This is a very important factor for at least half of all respondents in Cyprus (62%) and Greece (54%).

QC13.2 How important or not are the following factors in your decision to buy food products?



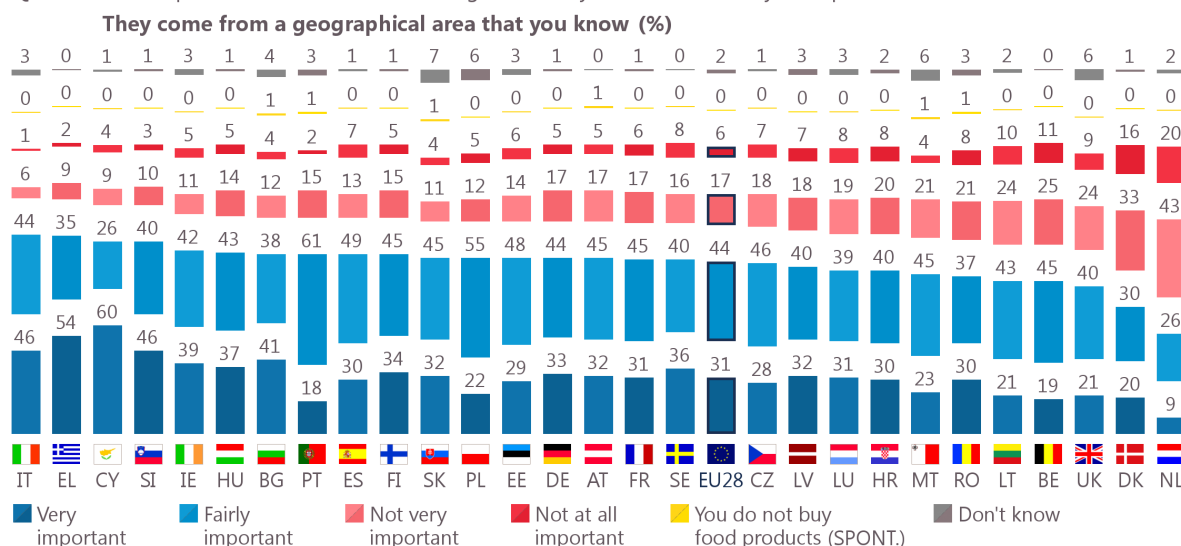
Having a specific label ensuring quality is an important factor for more than six in ten in each country. Proportions range from 94% of respondents in Cyprus, 89% in Italy and Sweden and 87% in Ireland, to 63% in Austria and the Czech Republic and 66% in Lithuania. Respondents in Cyprus (73%), Bulgaria (51%) and Ireland (49%) are the most likely to say this is very important.

QC13.3 How important or not are the following factors in your decision to buy food products?



Coming from a known geographical area is an important factor for 90% of respondents in Italy, 89% in Greece and 86% in Cyprus, compared to 35% in the Netherlands, 50% in Denmark and 61% in the United Kingdom. It is very important for 60% of respondents in Cyprus and 54% in Greece.

QC13.1 How important or not are the following factors in your decision to buy food products?



The **socio-demographic analysis** shows respondents aged 40+ are the most likely to say **coming from a geographical area that they know** and **products respecting local tradition and "know-how"** are important when purchasing food products. Respondents aged 15-24 are the least likely to say **having a specific quality label is important**: 73% do so compared to 79% of those aged 40-54.

In addition, respondents who think agriculture and rural areas are important are more likely to say each factor is important in their decision to buy food products, compared to those who say agriculture and rural areas are not important. For instance, 76% of those who think agriculture and rural areas are important say coming from a known geographical area is an important factor, compared to 59% of those who think agriculture and rural areas are not important.

QC13 How important or not are the following factors in your decision to buy food products?

Total 'Important' (% - EU)

	They respect local tradition and "know-how"	They have a specific label ensuring the quality of the product	They come from a geographical area that you know
EU28	77	76	75
Age			
15-24	66	73	65
25-39	75	77	72
40-54	80	79	78
55 +	79	76	77
Agriculture and rural areas			
Important	78	78	76
Not important	65	64	59

2 Focus on quality labels

a. Awareness of quality labels

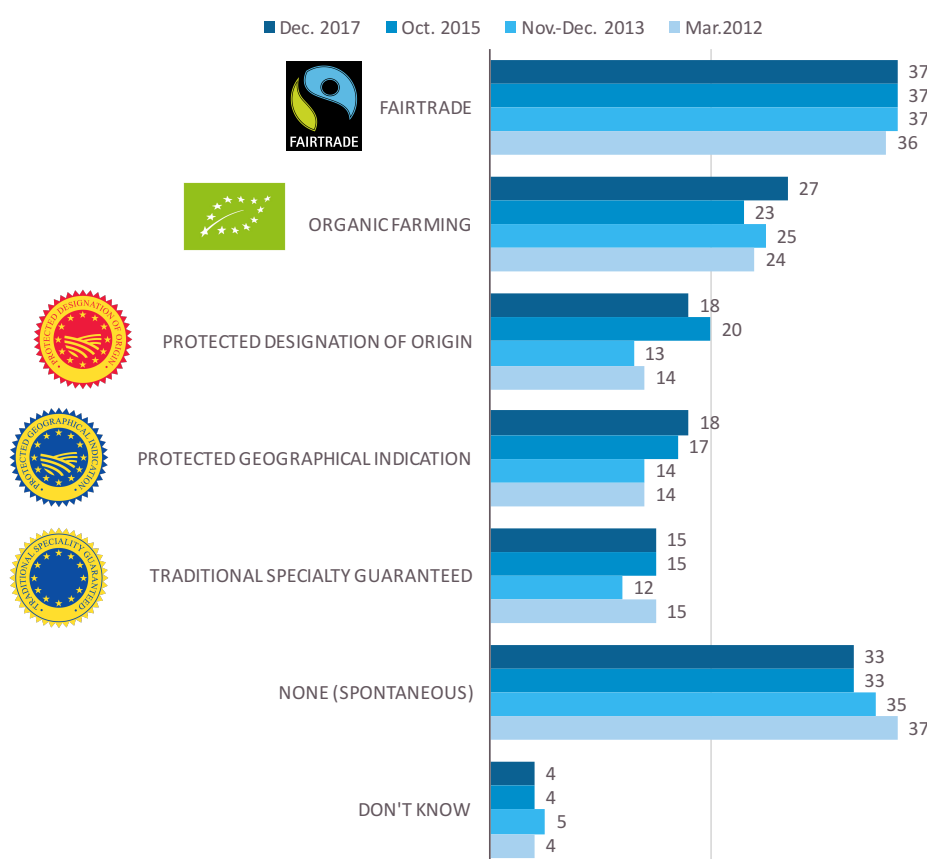
The Fairtrade label has the highest recognition amongst consumers

Respondents were shown a series of logos and asked which they were aware of ³¹. The Fairtrade logo (which is not an EU logo) has the highest recognition (37%), followed by organic farming (27%). Almost one in five are aware of the protected designation of origin and protected geographical indication logos (both 18%) while 15% are aware of the traditional specialty guaranteed logo. One third (33%) are not aware of any of these.

Overall 63% of respondents are aware of at least one of these logos.

There has generally been little change since 2015, with the most notable being a four-point increase in the proportion who are aware of the organic farming logo. Since 2012, awareness of the organic farming (+3 pp), protected designation of origin (+4 pp), protected geographical indication (+4 pp) has increased.

QC14 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



³¹ QC14 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE) LOGOS SHOWN: ORGANIC FARMING; FAIRTRADE; PROTECTED DESIGNATION OF ORIGIN; PROTECTED GEOGRAPHICAL INDICATION; TRADITIONAL SPECIALTY GUARANTEED.

Awareness of the **Fairtrade** logo varies widely across the EU. Respondents in the Netherlands (88%), Sweden (86%), Luxembourg (84%) and Austria (82%) are the most likely to be aware of this logo, compared to 3% in Romania, Spain and Bulgaria.

The **organic farming** logo has the highest awareness amongst respondents in Luxembourg (58%), Sweden (54%) and Lithuania (47%), particularly when compared to those in Romania (9%), Portugal (11%) and Malta (12%).

Respondents in France (45%), Italy (32%) and Greece (31%) are the most likely to be aware of the **protected designation of origin logo**, while those in Romania, Malta, the United Kingdom and Denmark (all 5%) are the least likely to be so.

Those in France (38%), Italy (33%) and the Czech Republic (30%) are the most likely to be aware of the **protected geographical indication** logo, particularly compared to those in the United Kingdom, the Netherlands (both 6%) and Denmark (7%).






























The **traditional speciality guaranteed** logo has the highest awareness amongst respondents in the Czech Republic (30%), Lithuania (29%), Greece and Slovakia (both 27%), and the lowest amongst those in the Netherlands, Denmark (both 6%), the United Kingdom and Germany (both 8%).

Compared to 2015, there have been large changes in awareness of the organic farming logo in some countries. Respondents in Luxembourg (+25 pp), the Netherlands (+17 pp), Poland and Sweden (both +13 pp) are now much more likely to be aware of this. The reverse is true in Austria (-14 pp) and Lithuania (-9 pp).

Changes in awareness of the protected designation of origin logo have generally been small. The largest declines in awareness are seen in Cyprus (-8 pp) and Spain (-7 pp), while the largest increases are seen amongst those in the United Kingdom, Hungary, Croatia and Greece (all +2 pp). The largest increase in the proportion aware of the protected geographic indication logo are seen amongst those in France (+7 pp) while the largest decline is observed amongst those in Cyprus (-7 pp).

Finally, respondents in Luxembourg (+5 pp) are now more likely to be aware of the traditional specialty guaranteed logo, while those in Lithuania (-14 pp) and Romania (-8 pp) are less likely to be aware.

QC14 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(%)

		Fairtrade	2017 - 2015	Organic farming	2017 - 2015	Protected designation of origin	2017 - 2015	Protected geographical indication	2017 - 2015	Traditional specialty guaranteed	2017 - 2015
EU28		37	=	27	▲ 4	18	▼ 2	18	▲ 1	15	=
BE		68	▲ 5	39	▲ 9	9	▼ 3	13	▲ 2	9	▲ 1
BG		3	▼ 4	17	▼ 4	14	=	12	▼ 2	12	▼ 5
CZ		26	▲ 5	23	=	25	▼ 1	30	▲ 5	30	▲ 1
DK		74	▲ 6	46	▲ 10	5	▼ 1	7	▲ 1	6	=
DE		69	▲ 6	41	▲ 9	12	▼ 3	12	▲ 3	8	▲ 1
EE		24	▲ 1	36	▼ 4	12	▼ 1	15	▼ 1	13	▼ 2
IE		72	▼ 7	24	▼ 5	9	▼ 4	10	▼ 6	9	▼ 7
EL		6	▼ 3	15	=	31	▲ 2	22	▲ 3	27	▲ 2
ES		3	▼ 1	14	▲ 1	16	▼ 7	15	▼ 4	13	▼ 4
FR		28	▲ 2	40	▲ 8	45	=	38	▲ 7	22	▲ 1
HR		10	▼ 4	16	▼ 1	20	▲ 2	24	=	22	▼ 1
IT		7	▼ 2	16	=	32	=	33	▲ 4	24	▲ 2
CY		10	=	19	▼ 2	7	▼ 8	9	▼ 7	21	▼ 7
LV		6	▼ 2	38	▲ 2	6	=	9	▼ 4	12	▼ 4
LT		8	=	47	▼ 9	13	=	19	=	29	▼ 14
LU		84	▲ 3	58	▲ 25	22	▼ 2	22	▲ 5	15	▲ 5
HU		9	▼ 1	14	▼ 4	13	▲ 2	13	▼ 1	10	▼ 6
MT		33	▲ 2	12	▼ 5	5	▼ 4	12	▼ 2	10	▼ 1
NL		88	▲ 12	44	▲ 17	6	▼ 2	6	▼ 1	6	▼ 1
AT		82	▲ 1	33	▼ 14	12	▲ 1	11	▼ 2	9	▼ 7
PL		9	▼ 2	29	▲ 13	12	▼ 1	15	=	14	▼ 3
PT		8	▲ 2	11	▼ 1	21	=	19	▼ 2	25	▲ 2
RO		3	▼ 2	9	▼ 4	5	▼ 4	9	▼ 5	16	▼ 8
SI		20	▲ 5	38	▲ 1	19	▲ 1	26	▲ 5	17	▲ 3
SK		18	▼ 2	27	=	26	▼ 1	22	▼ 5	27	▼ 3
FI		54	▼ 6	44	▲ 9	11	▲ 1	11	▲ 1	18	▼ 2
SE		86	▲ 2	54	▲ 13	8	▼ 1	11	▲ 3	10	▲ 1
UK		78	▼ 5	14	▼ 3	5	▲ 2	6	=	8	▲ 3




Increases by 3 pp or more

Decreases by 3 pp or more

The **socio-demographic analysis** illustrates the following:

- Respondents aged 55+ are the least likely to be aware of each logo. For example, 21% are aware of the organic farming logo, compared to 34% of 15-24 year olds.
- The longer a respondent remained in education, the more likely they are to be aware of each logo. For instance, 49% who completed education aged 20+ are aware of the Fairtrade logo, compared to 23% who completed education aged 15 or younger.
- Managers are the most likely to be aware of the organic farming (40%) and Fairtrade (58%) logos, while managers, the self-employed and other white collar workers are the most likely to be aware of each of the other logos.

QC14 Which of the logos are you aware of? (SHOW LOGOS - MULTIPLE ANSWERS POSSIBLE)
(% - EU)

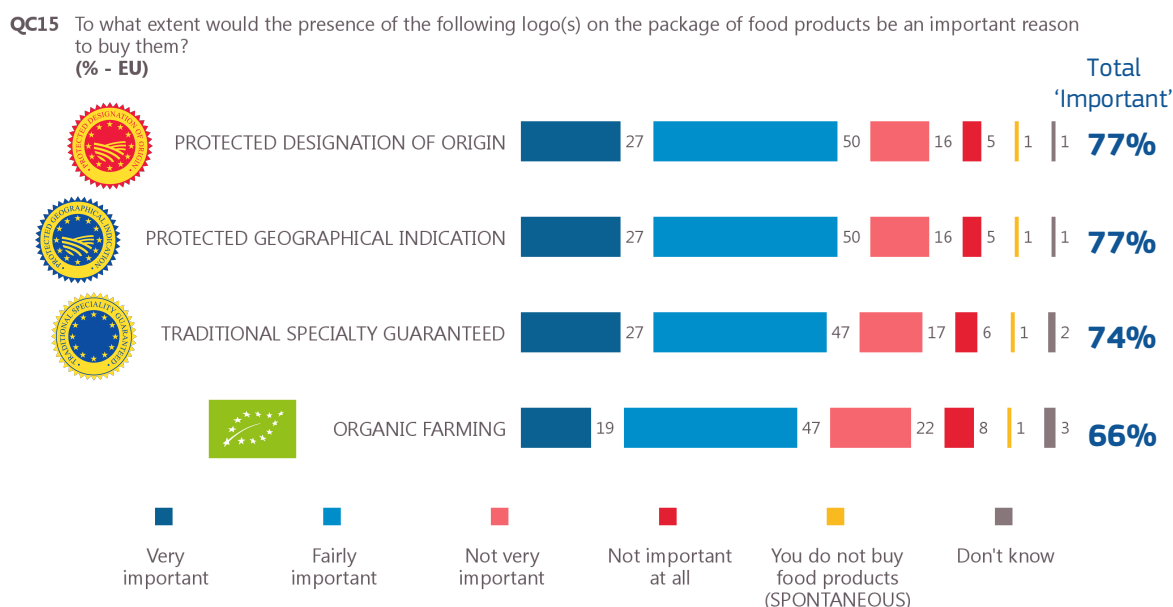
	Fairtrade	Organic farming	Protected designation of origin	Protected geographical indication	Traditional specialty guaranteed
EU28	37	27	18	18	15
 Age					
15-24	44	34	16	19	16
25-39	40	33	21	22	18
40-54	41	27	22	20	16
55 +	32	21	16	15	12
 Education (End of)					
15-	23	13	13	10	10
16-19	34	23	18	17	15
20+	49	37	24	24	18
Still studying	49	40	17	20	17
 Socio-professional category					
Self-employed	39	30	27	27	23
Managers	58	40	22	24	15
Other white collars	38	31	25	23	20
Manual workers	34	23	17	17	14
House persons	26	21	13	14	12
Unemployed	31	22	18	16	14
Retired	31	21	15	13	11
Students	49	40	17	20	17

b. Quality labels and Europeans' purchasing decisions

Amongst those who are aware of them, quality labels are an important reason to buy food products

Although awareness of various quality labels is low, for respondents that do know them they would be an important reason to buy food³². More than three quarters (77%) say the protected designation of origin logo would be an important reason to buy a packaged food product, with 27% saying it would be very important. The same proportion say the protected geographical indication logo would be important (77%), with 27% saying it would be very important.

Almost three quarters (74%) say the traditional specialty guaranteed would be important, with 27% saying it would be very important. Finally, two thirds (66%) say the organic farming logo would be important when deciding to buy a packaged food product, with 19% saying it would be very important. The organic farming logo is the least likely to be considered important by those who recognise it, even though recognition has increased since 2015.



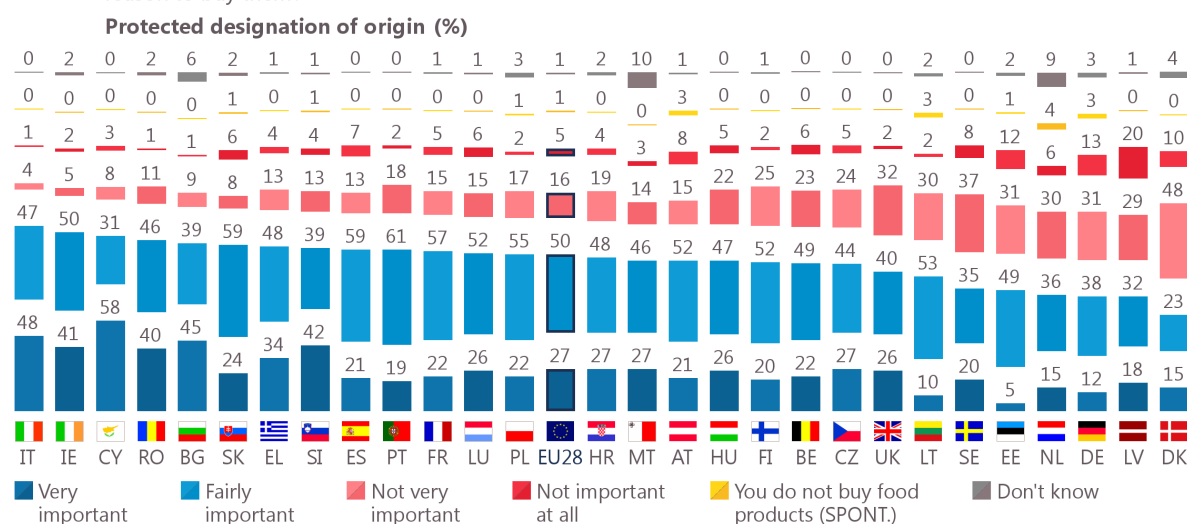
Base: respondents who are aware of each of the logos

³² QC15 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them? LOGOS SHOWN: ORGANIC FARMING; FAIRTRADE; PROTECTED DESIGNATION OF ORIGIN; PROTECTED GEOGRAPHICAL INDICATION; TRADITIONAL SPECIALTY GUARANTEED. Very important; Fairly important; Not very important; Not at all important; You do not buy food products (SPONTANEOUS); Don't know.

There is a wide range of opinions about the importance of the protected designation of origin logo as a reason to buy packaged food products amongst respondents who are aware of the logo³³. Almost all respondents in Italy (95%) who are aware of this logo, as well as 91% in Ireland say it is important. At the other end of the scale 38% in Denmark and 50% in Germany and Latvia say the same. One in five respondents in Latvia say this logo is not important at all.

There is no consistent relationship between the level of awareness of this logo and its importance as a reason to purchase food products. For example, France has the largest proportion of respondents who are aware of the protected designation of origin logo, but these respondents are less likely to say this logo is important when making purchasing decisions compared to those in a number of other countries. Respondents in Romania, on the other hand, have the lowest level of awareness of this logo. However, for almost nine in ten who are aware of the logo, it is an important factor in purchasing decisions.

QC15.2 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?



Base: respondents who are aware of the Protected designation of origin logo (n=5,183)

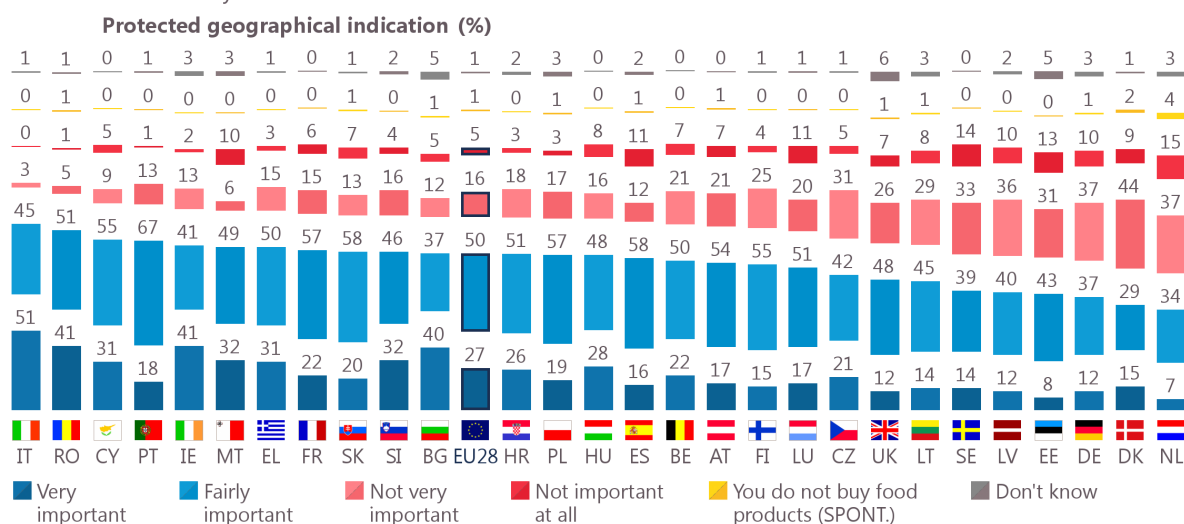
³³ The following countries are excluded from the discussion due to very low sample size (<50): CY, MT. Results for the following countries should be interpreted with caution due to low sample size (50-150): LT, HU, LU, DK, IE, LV, MT, UK, SE, FI, RO, PL, AT, NL.

Amongst those who are aware of the protected geographical indication logo, respondents in Italy (96%) and Romania (92%) are the most likely to say it is important³⁴, while those in the Netherlands (41%), Denmark (44%) and Germany (49%) are the least likely to do so.

Just over half (51%) in Italy say this is very important, as do 41% in Romania and Ireland and 40% in Bulgaria.

Once again there is no consistent relationship between awareness of the logo and its importance in purchasing decisions. Although respondents in Italy have high levels of awareness and importance, and respondents in the Netherlands and Denmark have low levels of awareness and importance, this pattern does not hold in other countries. For instance, just 9% of respondents in Romania are aware of the protected geographical indication logo. However, amongst this group of respondents, more than nine in ten say it is an important factor in purchasing decisions.

QC15.3 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?



Base: respondents who are aware of the Protected geographical indication logo (n=5,136)

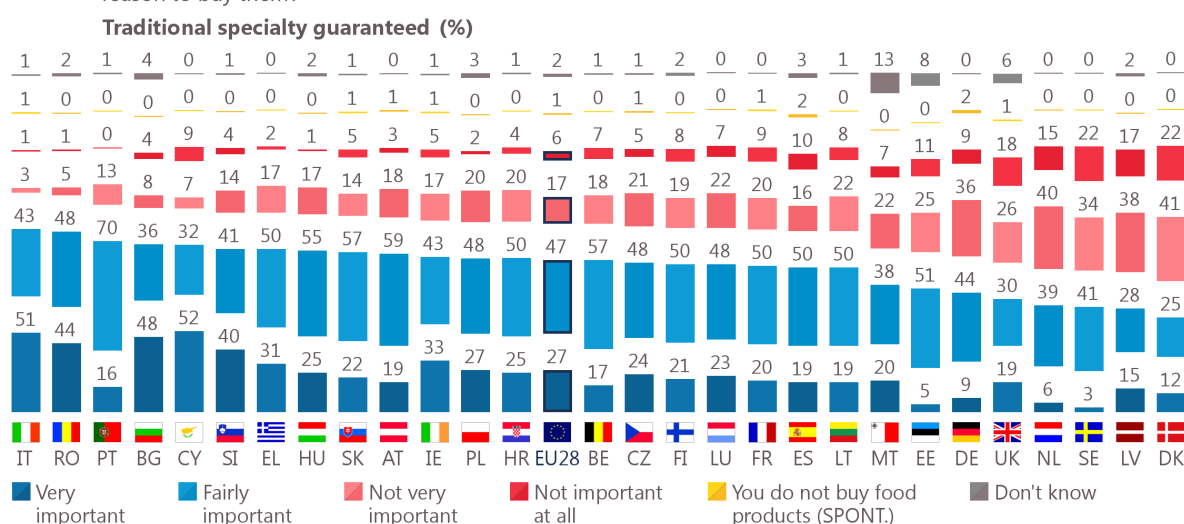
³⁴ The following countries are excluded from the discussion due to very low sample size (<50): CY. Results for the following countries should be interpreted with caution due to low sample size (50-99): BE, BG, DK, EE, IE, LV, LU, HU, MT, NL, AT, PL, RO, FI, SE, UK.

Amongst respondents who recognise the traditional specialty guaranteed logo, more than nine in ten in Italy (94%) and Romania (92%), as well as 86% in Portugal say the traditional specialty guaranteed logo is important³⁵. At the other end of the scale 37% in Denmark, 43% in Latvia and 44% in Sweden say the same.

More than half of all respondents in Cyprus (52%) and Italy (51%) as well as 48% in Bulgaria say this is very important. On the other hand, 22% in Denmark and Sweden say this logo is not important at all as a reason to buy packaged food products.

Once again there is no consistent relationship across countries between awareness of the logo and its importance in purchasing decisions. For example, in Ireland and Austria awareness is relatively low but importance amongst those aware of the label is relatively high. In the Netherlands, Denmark, the UK and Germany, on the other hand, both awareness and importance are low.

QC15.4 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?



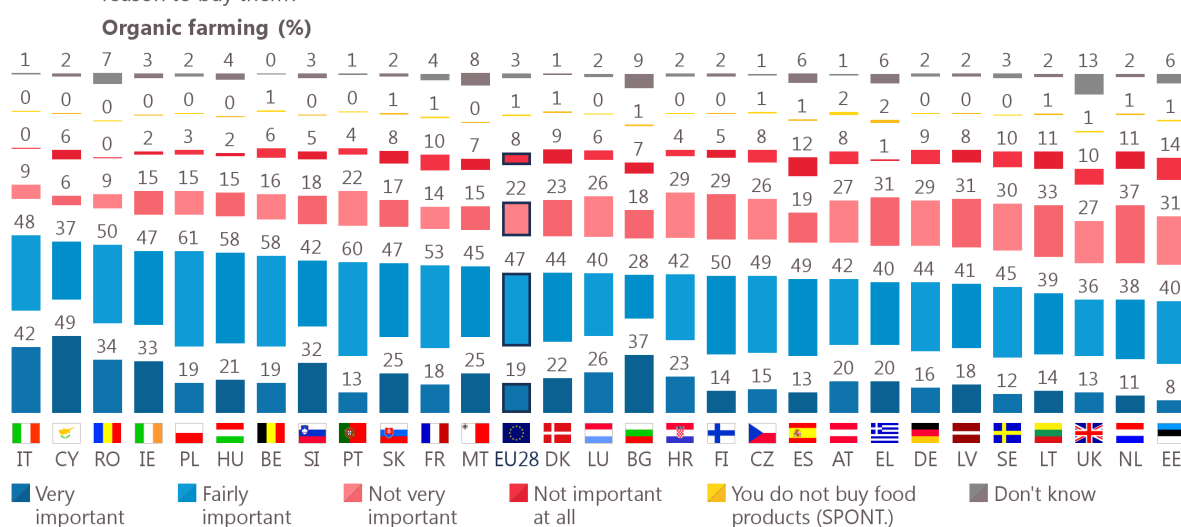
Base: respondents who are aware of the Traditional specialty guaranteed logo (n=4,188)

³⁵ Results for the following countries should be interpreted with caution due to low sample size (50-150): BE, BG, DK, DE, EE, IE, CY, ES, LU, LV, MT, NL, AT, PL, SE, UK.

Respondents in Italy (90%), Cyprus (86%) and Romania (84%) who are aware of the organic farming logo are the most likely to say it is important.³⁶ This compares to 48% in Estonia and 49% in the United Kingdom and the Netherlands. Respondents in Cyprus (49%) and Italy (42%) are the most likely to say this is very important.

As has been the case for the other labels, levels of awareness of the organic farming logo are not consistently related to levels of importance in purchasing decisions. For instance, awareness in the Netherlands is one of the highest of any Member State, but importance amongst those aware of the logo is the second lowest. In Italy, on the other hand, awareness is low but importance is the highest of any country.

QC15.1 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?



Base: respondents who are aware of the Organic farming logo (n=7,606)

³⁶ Results for the following countries should be interpreted with caution due to low sample size (50-150): ES, CY, MT, PT, RO.

The **socio-demographic analysis** highlights the following:

- Women are more likely to say protected designation of origin (81% vs 75% of men) and protected geographical indication (79% vs 74%) are important.
- Respondents aged 55+ are the most likely to say protected geographical indication or traditional specialty guaranteed logos are important. For instance, 80% of those aged 55+ say this about the protected geographical indication logo, compared to 74% of 15-39 year olds.
- Respondents who completed education aged 19 or younger are the most likely to say the traditional specialty guaranteed logo is important.
- Retired persons are the most likely to say the protected geographical indication logo is important (81%), while other white collar workers are the most likely to say this about the traditional specialty guaranteed logo (81%). Retired persons and other white collar workers are the most likely to say the protected designation of origin logo is important.

In addition, respondents who think agriculture and rural areas are important are more likely to say each of these logos are important when purchasing food products. For example, 78% who think agriculture and rural areas are important say the protected designation of origin logo is important, compared to 64% of those who say agriculture and rural areas are not important.

QC15 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?
Total 'Important' (% - EU)

	Protected designation of origin	Protected geographical indication	Traditional specialty guaranteed	Organic farming
EU28	77	77	74	66
 Gender				
Man	75	74	73	64
Woman	81	79	74	68
 Age				
15-24	78	74	71	66
25-39	75	74	73	66
40-54	79	77	73	66
55 +	78	80	77	67
 Education (End of)				
15-	82	76	76	66
16-19	78	80	77	66
20+	77	74	71	67
Still studying	75	75	72	66
 Socio-professional category				
Self-employed	76	77	76	67
Managers	77	76	66	64
Other white collars	81	79	81	66
Manual workers	75	74	72	65
House persons	76	66	64	67
Unemployed	74	74	80	66
Retired	81	81	76	69
Students	75	75	72	66
Agriculture and rural areas				
Important	78	77	75	67
Not important	64	60	58	61

3 Attitudes towards products coming from “organic” agriculture

Organic food products are seen as more expensive, but having better quality, safety, and standards than other food products

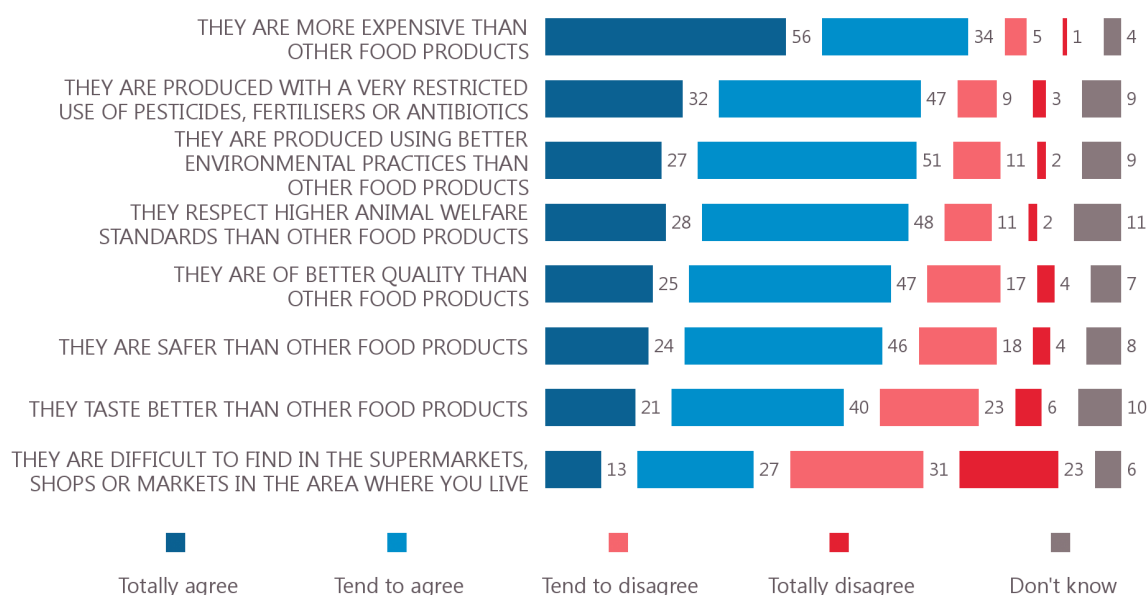
Respondents were asked the extent to which they agreed or disagreed with a number of statements about food from organic agriculture³⁷.

Nine in ten (90%) say organic food products are more expensive, with 56% totally agreeing with this statement. Almost eight in ten agree they are produced with a very restricted use of pesticides, fertilisers or antibiotics (79%, with 32% totally agreeing). Almost as many (78%) say they are produced using better environmental practices than other food products, with 27% totally agreeing. More than three quarters say food products from organic farming respect higher animal welfare standards than other food products (76%), with 28% totally agreeing.

More than seven in ten say food products from organic farming are of better quality (72%) and are safer than other food products (70%). In each case around one quarter totally agrees. More than six in ten say these products taste better (61%).

Four in ten say products from organic farming are difficult to find in the supermarkets, shops or markets in the area where they live (40%).

QC16 Do you agree or not with the following statements about food products coming from 'organic' agriculture? (% - EU)

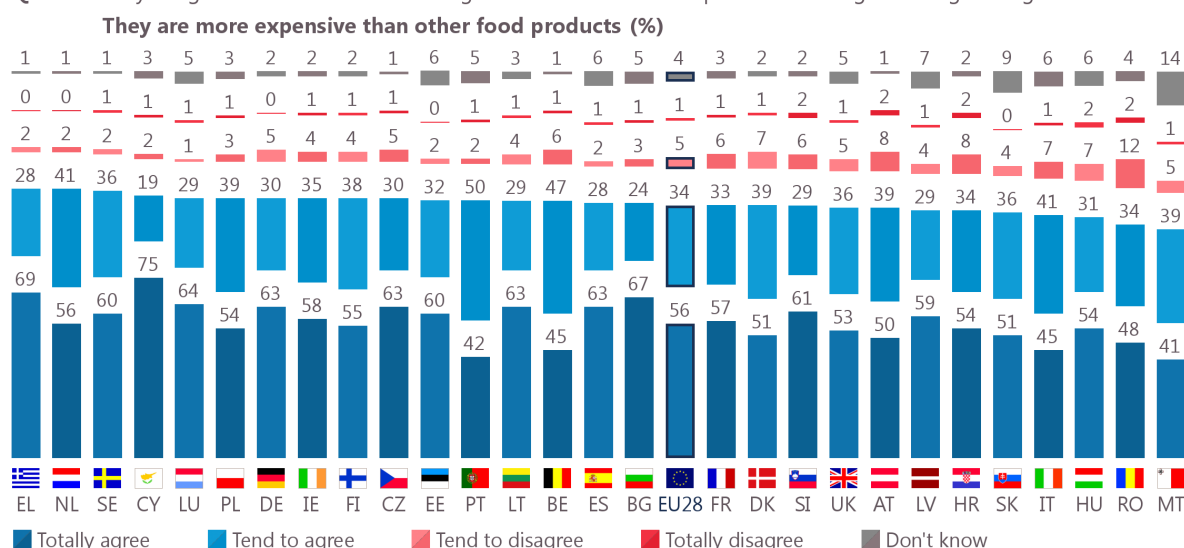


³⁷ QC16 Do you agree or not with the following statements about food products coming from 'organic' agriculture? They are safer than other food products; They are of better quality than other food products; They are more expensive than other food products; They taste better than other food products; They are produced using better environmental practices than other food products; They are produced with a very restricted use of pesticides, fertilisers or 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. Totally agree; Tend to agree; Tend to disagree; Totally disagree; Don't know.

At least eight in ten in each country agree that food products from organic agriculture are more expensive, with proportions ranging from 97% in Greece and the Netherlands and 96% in Sweden to 80% in Malta, 82% in Romania and 85% in Hungary.

In 23 Member States at least half totally agree, with those in Cyprus (75%), Greece (69%) and Bulgaria (67%) the most likely to do so.

QC16.3 Do you agree or not with the following statements about food products coming from 'organic' agriculture?

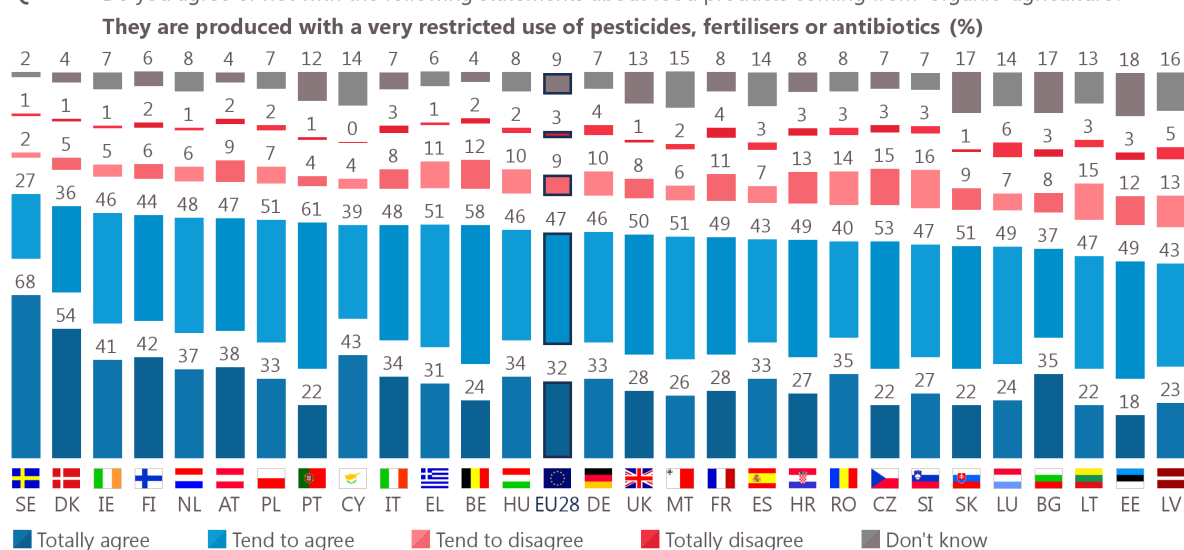


At least two thirds in each country agree that organic food products are produced with a very restricted use of pesticides, fertilisers or antibiotics. Respondents in Sweden (95%), Denmark (90%) and Ireland (87%) are the most likely to agree, compared to 66% in Latvia, 67% in Estonia and 69% in Lithuania.

Sweden (68%) and Denmark (54%) are the only countries where at least half agree.

In eleven countries more than one in ten say they don't know, with the largest proportions seen in Estonia (18%), Bulgaria and Slovakia (both 17%).

QC16.6 Do you agree or not with the following statements about food products coming from 'organic' agriculture?

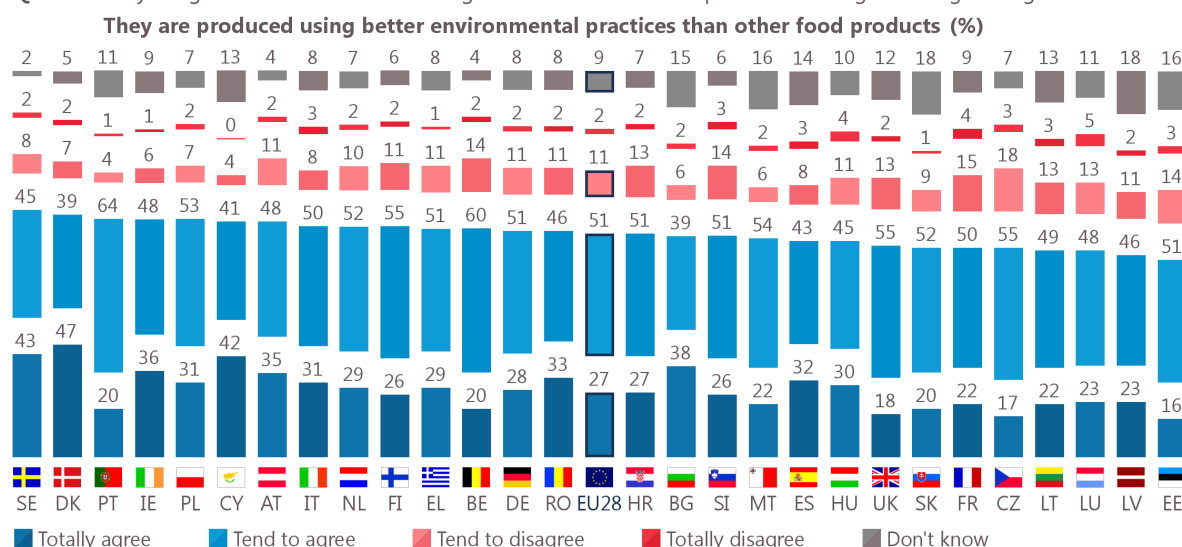


Respondents in Sweden (88%), Denmark (86%), Ireland, Poland and Portugal (all 84%) are the most likely to agree that organic products are produced using better environmental practices than other food products. More than two thirds of respondents in Estonia (67%), Latvia (69%), Luxembourg and Lithuania (both 71%) also agree.

Those in Denmark (47%), Sweden (43%) and Cyprus (42%) are the most likely to totally agree.

Almost one in five respondents in Latvia and Slovakia say they don't know (both 18%).

QC16.5 Do you agree or not with the following statements about food products coming from 'organic' agriculture?

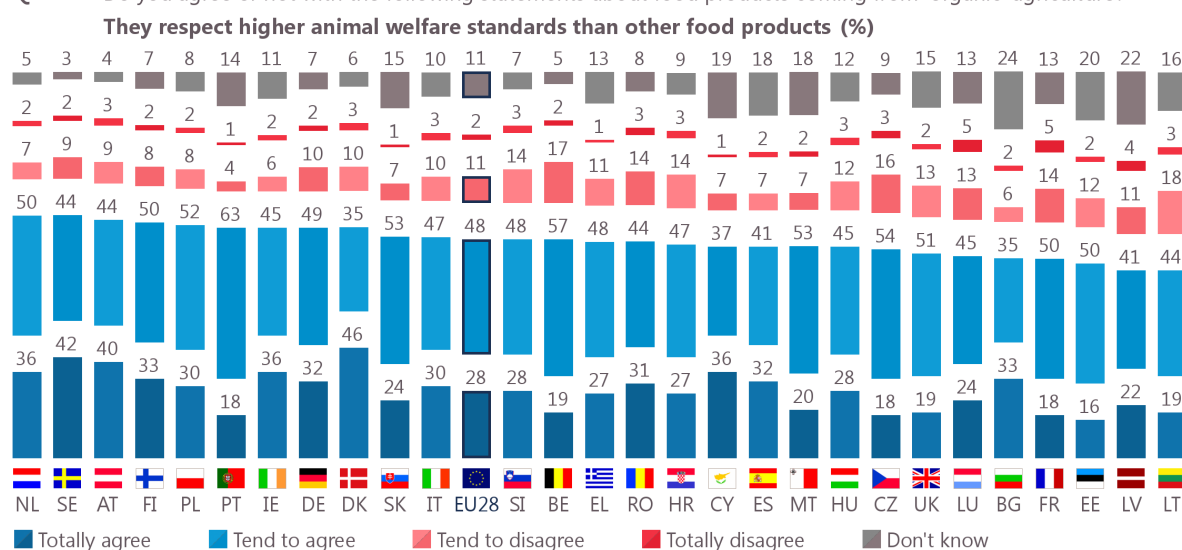


More than six in ten respondents in each country agree that food products from organic agriculture respect higher animal welfare standards, with proportions ranging from 86% in the Netherlands and Sweden and 84% in Austria to 63% in Lithuania and Latvia and 66% in Estonia.

Respondents in Denmark (46%), Sweden (42%) and Austria (40%) are the most likely to totally agree.

There are high levels of don't know responding in some countries, particularly Bulgaria (24%), Latvia (22%) and Estonia (20%).

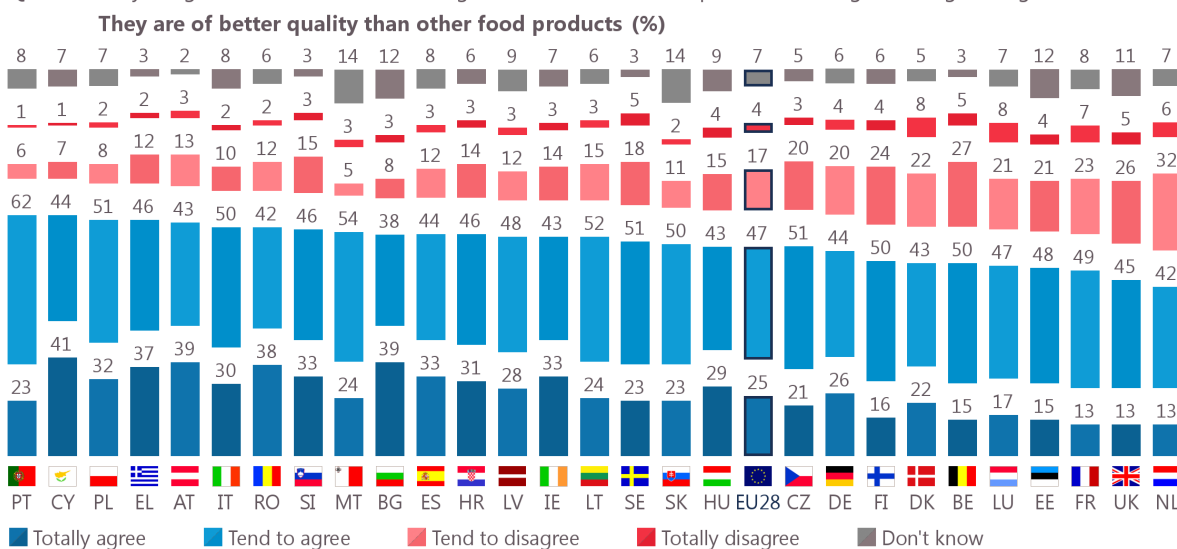
QC16.7 Do you agree or not with the following statements about food products coming from 'organic' agriculture?



More than half of the respondents in each country agree that food products from organic agriculture are of better quality. Respondents in Cyprus, Portugal (both 85%), Greece and Poland (both 83%) are the most likely to agree, compared to 55% in the Netherlands, 58% in the United Kingdom and 62% in France.

Respondents in Cyprus (41%), Austria and Bulgaria (both 39%) are the most likely to totally agree.

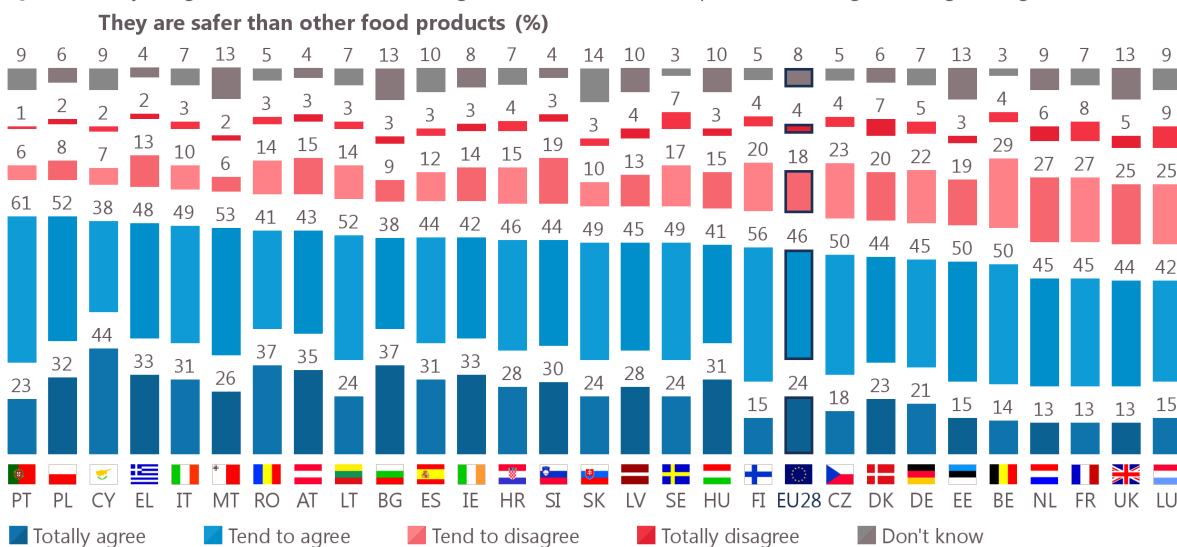
QC16.2 Do you agree or not with the following statements about food products coming from 'organic' agriculture?



Respondents in Poland, Portugal (both 84%) and Cyprus (82%) are the most likely to agree that food products from organic agriculture are safer. More than half in the United Kingdom, Luxembourg (both 57%), the Netherlands and France (both 58%) also agree.

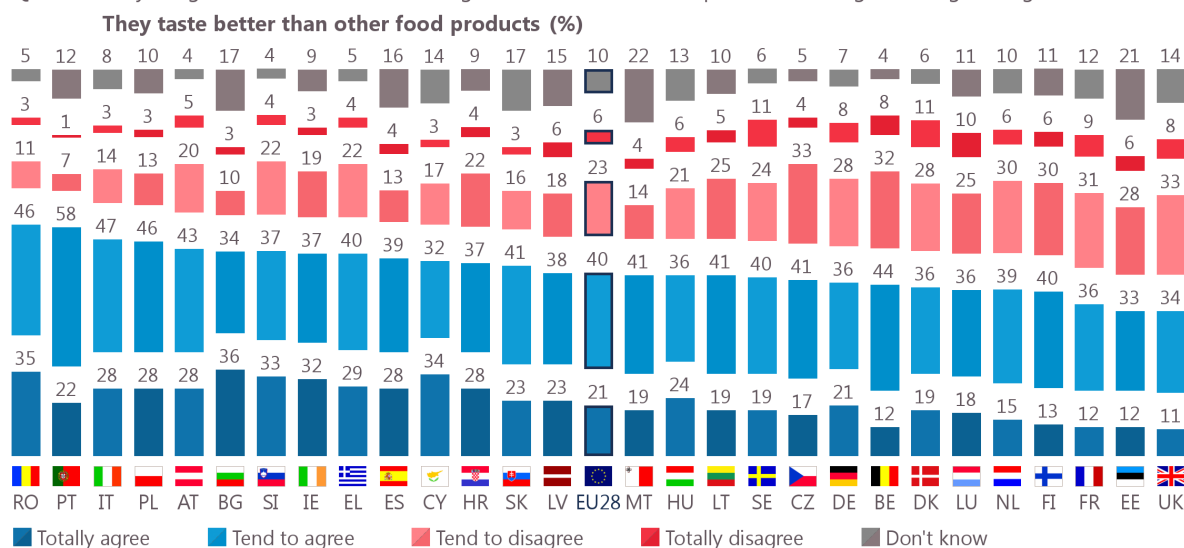
Respondents in Cyprus (44%), Romania and Bulgaria (both 37%) are the most likely to totally agree.

QC16.1 Do you agree or not with the following statements about food products coming from 'organic' agriculture?



In 25 countries the majority of respondents agree that organic food products taste better. Those in Romania (81%), Portugal (80%) and Italy (75%) are the most likely to agree, compared to 45% in the United Kingdom and Estonia and 48% in France.

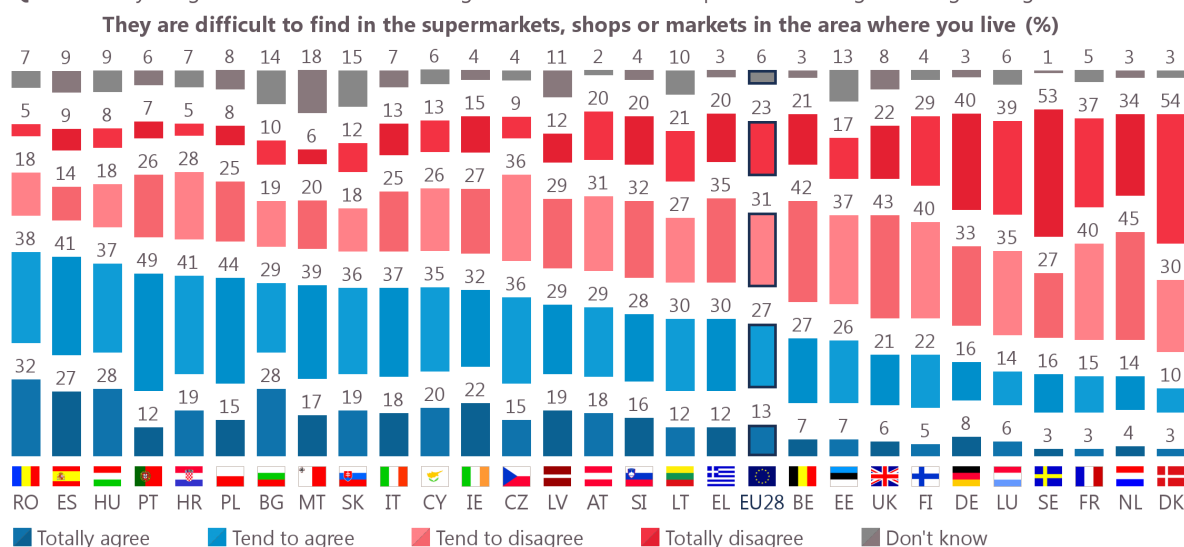
QC16.4 Do you agree or not with the following statements about food products coming from 'organic' agriculture?



The availability of organic food products is highly variable. In 13 countries the majority say they are difficult to find in the supermarkets, shops or markets in the area where they live, and this is particularly the case for respondents in Romania (70%), Spain (68%) and Hungary (65%). In contrast 13% in Denmark and 18% in France and the Netherlands say the same.

Respondents in Romania (32%), Bulgaria and Hungary (both 28%) are the most likely to totally agree. Overall, respondents in southern and eastern countries are more likely to say organic food products are difficult to find locally.

QC16.8 Do you agree or not with the following statements about food products coming from 'organic' agriculture?







Highlights from the **socio-demographic analysis** include:

- Respondents under 55 years of age are the most likely to agree that organic food products are of **better quality than other food products**, are **produced using better environmental practices than other food products**, are **produced with a very restricted use of pesticides, fertilisers or antibiotics**, or that they **respect higher animal welfare standards than other food products**. For instance, 75% of those aged 15-24 say organic food products are of better quality, compared to 67% of those aged 55+.
- Respondents who completed their education aged 30+ are the most likely to agree with each statement except difficulty finding organic products locally. For example, 73% agree that organic food products are safer, compared to 66% who completed education aged 15 or younger.
- There are no consistent patterns based on occupation, although students, the self-employed, managers and other white collar workers are the most likely to agree that organic food products are of **better quality than other food products**, that they are **produced using better environmental practices** than other food products, and that they are **produced with a very restricted use of pesticides, fertilisers or antibiotics**.
- The more urbanised a respondent's environment, the more likely they are to agree these products are of **better quality**, that they are **produced using better environmental practices**, or that they **respect higher animal welfare standards than other food products**. For example, 75% living in large towns think organic food products are better quality, compared to 70% in rural villages.

In addition, respondents who think agriculture and rural areas are important for the future are more likely to agree with each statement, compared to those who think these areas are not important. The exception is the local availability of organic food products (both 41%).

QC16 Do you agree or not with the following statements about food products coming from 'organic' agriculture?

Total 'Agree' (% - EU)

	They are more expensive than other food products	They are produced with a very restricted use of pesticides, fertilisers or antibiotics	They are produced using better environmental practices than other food products	They respect higher animal welfare standards than other food products	They are of better quality than other food products	They are safer than other food products	They taste better than other food products	They are difficult to find in the supermarkets, shops or markets in the area where you live
EU28	90	79	78	76	72	70	61	40
 Age								
15-24	88	82	81	80	75	74	58	42
25-39	91	82	81	77	76	72	65	43
40-54	91	82	80	78	73	69	64	39
55 +	90	76	73	72	67	67	59	39
 Education (End of)								
15-	86	74	71	69	66	66	59	46
16-19	91	79	76	75	71	68	61	42
20+	93	84	83	80	75	73	64	35
Still studying	89	84	84	82	77	77	59	39
 Socio-professional category								
Self-employed	92	83	80	78	78	76	66	43
Managers	92	84	84	81	76	71	64	35
Other white collars	94	85	83	79	78	74	68	44
Manual workers	90	79	77	76	71	69	62	42
House persons	89	77	78	71	69	69	63	47
Unemployed	90	77	75	74	70	66	57	43
Retired	89	75	72	71	64	65	56	38
Students	89	84	84	82	77	77	59	39
 Subjective urbanisation								
Rural village	88	78	75	74	70	69	60	43
Small/ mid-size town	91	80	77	76	71	69	61	39
Large town	92	82	81	79	75	72	63	41
Agriculture and rural areas								
Important	91	81	79	77	73	71	62	41
Not important	82	69	67	65	61	56	54	41

4 Perceived priorities for research and innovation in the agri-food sector

Agri-food research and innovation should prioritise ensuring supplies of healthy food in the long term

Respondents were asked about the priorities for research and innovation in the agri-food sector³⁸. More than four in ten (41%) mention ensuring supplies of healthy food in the long term. For 31% promoting sustainable growth and job creation in rural areas should be the priority, while 29% mention providing sustainable solutions to protect plants and animals from diseases and pests.

For just over one quarter the priority should be supporting the development of ecological approaches to farming, or contributing to better management of natural resources (both 26%).

Fewer than one in five (17%) mention developing and sharing knowledge in farming and rural areas.

QC22 Which of the following should be the priority for research and innovation in the agri-food sector? (MAX. 2 ANSWERS)
(% - EU)



³⁸ QC22 Which of the following should be the priority for research and innovation in the agri-food sector? (MAX. 2 ANSWERS) Ensuring supplies of healthy food in the long term; Contributing to a better management of natural resources; Providing sustainable solutions to protect plants and animals from diseases and pests; Supporting the development of ecological approaches to farming; Promoting sustainable growth and job creation in rural areas; Developing and sharing knowledge in farming and rural areas; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

In 22 EU Member States, respondents are most likely to say that **ensuring supplies of healthy food in the long term** should be the priority for research and innovation in the long term. At least half of all respondents in Finland (58%), Hungary (54%), Germany (52%), Bulgaria, the Czech Republic and Austria (all 50%) think this should be the priority, compared to 30% in the Netherlands and France and 33% in Luxembourg.

In Latvia (47%), Lithuania (44%) and Spain (41%) respondents are most likely to mention **promoting sustainable growth and job creation in rural areas**. At the other end of the scale 20% in Slovenia, 22% in Luxembourg and 23% in Germany think the same way.






























Respondents in the Netherlands (46%) and Luxembourg (36%) are most likely to mention **providing sustainable solutions to protect plants and animals from disease and pests**, and this idea is also widely mentioned by respondents in Denmark (39%) and Germany (38%). In contrast, 19% in Croatia and 20% in Slovenia and Latvia also mention this option.

Respondents in France are most likely to say the priority should be **contributing to a better management of natural resources** (38%), and this option is also widely mentioned by those in Sweden (44%) and Luxembourg (35%). Respondents in Germany, Denmark (both 15%) and Austria (17%) are the least likely to mention this.

Supporting the development of ecological approaches to farming is most likely to be mentioned by respondents in Denmark (41%), France and the Netherlands (both 34%), and least likely to be mentioned by those in the United Kingdom (16%), Hungary, Malta and Ireland (all 17%).

No more than three in ten in any country think **developing and sharing knowledge in farming and rural areas** should be the priority. Proportions range from 29% in Greece, 25% in the Netherlands and 23% in Slovenia to 10% in Sweden and Luxembourg and 12% in Germany and the Czech Republic.

QC22 Which of the following should be the priority for research and innovation in the agri-food sector? (MAX. 2 ANSWERS)
(%)




		Ensuring supplies of healthy food in the long term	Promoting sustainable growth and job creation in rural areas	Providing sustainable solutions to protect plants and animals from diseases and pests	Supporting the development of ecological approaches to farming	Contributing to a better management of natural resources	Developing and sharing knowledge in farming and rural areas
EU28		41	31	29	26	26	17
BE		48	24	32	28	32	21
BG		50	38	23	22	18	19
CZ		50	28	31	26	24	12
DK		43	30	39	41	15	15
DE		52	23	38	30	15	12
EE		38	36	22	19	20	16
IE		47	39	28	17	24	22
EL		41	36	28	26	29	29
ES		38	41	21	21	32	21
FR		30	35	32	34	38	14
HR		42	37	19	21	21	22
IT		39	35	24	25	29	19
CY		37	28	35	31	30	21
LV		39	47	20	22	20	20
LT		43	44	23	25	19	17
LU		33	22	36	32	35	10
HU		54	34	24	17	21	21
MT		47	25	29	17	23	15
NL		30	25	46	34	29	25
AT		50	28	35	27	17	22
PL		34	27	22	30	28	16
PT		43	37	25	26	34	14
RO		36	35	24	22	23	22
SI		49	20	20	30	28	23
SK		43	29	23	24	20	20
FI		58	35	30	23	24	13
SE		45	28	37	26	44	10
UK		40	26	25	16	18	15
Highest percentage per country		Lowest percentage per country					
Highest percentage per item		Lowest percentage per item					

The **socio-demographic analysis** reveals no differences based on gender or urbanisation, and relatively few differences based on age, education or occupation:

- Respondents aged 25-54 are the most likely to say the priority should be **supporting the development of ecological approaches to farming**: 29% of 40-54 year olds say this, compared to 23% of those aged 55+.
- The longer a respondent remained in education, the more likely they are to say that **contributing to a better management of natural resources, providing sustainable solutions to protect plants and animals from diseases and pests, or supporting the development of ecological approaches to farming** should be priorities. The reverse pattern is true for **ensuring supplies of healthy food in the long term**: 39% who completed education aged 20+ say this should be a priority, compared to 44% of those who completed education aged 15 or younger.
- Managers, the self-employed and other white collar workers are the most likely to mention **supporting the development of ecological approaches to farming**.

In addition, respondents who think agriculture and rural areas are important for the future are more likely to mention the following priorities: **ensuring supplies of healthy food in the long term; providing sustainable solutions to protect plants and animals from diseases and pests; supporting the development of ecological approaches to farming; promoting sustainable growth and job creation in rural areas**. For example, 42% mentioned ensuring the supply of healthy food in the long term, compared to 34% who think agriculture and rural areas are not important.

QC22 Which of the following should be the priority for research and innovation in the agri-food sector?
(MAX. 2 ANSWERS)
(% - EU)

	Ensuring supplies of healthy food in the long term	Promoting sustainable growth and job creation in rural areas	Providing sustainable solutions to protect plants and animals from diseases and pests	Contributing to a better management of natural resources	Supporting the development of ecological approaches to farming	Developing and sharing knowledge in farming and rural areas
EU28	41	31	29	26	26	17
 Age						
15-24	39	30	30	26	25	16
25-39	39	31	28	28	28	16
40-54	41	32	29	26	29	17
55 +	43	31	29	24	23	17
 Education (End of)						
15-	44	32	26	22	18	18
16-19	42	31	29	24	25	17
20+	39	31	30	30	33	16
Still studying	40	29	30	27	28	16
 Socio-professional category						
Self-employed	39	29	29	28	30	18
Managers	39	31	31	29	32	13
Other white collars	41	33	30	28	30	18
Manual workers	40	32	27	24	25	16
House persons	43	30	27	25	22	20
Unemployed	37	33	31	28	24	20
Retired	44	30	28	24	23	16
Students	40	29	30	27	28	16
Agriculture and rural areas						
Important	42	31	30	26	27	17
Not important	34	26	25	25	22	16

V. ATTITUDES TOWARDS INTERNATIONAL TRADE IN AGRICULTURAL PRODUCTS

This final section of the report explores opinions about international trade in agricultural products, including attitudes to trade barriers for agricultural imports and views about the impact of trade agreements relating to agricultural and food products.

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

A large majority are in favour of full compliance with EU quality and safety standards for agricultural imports

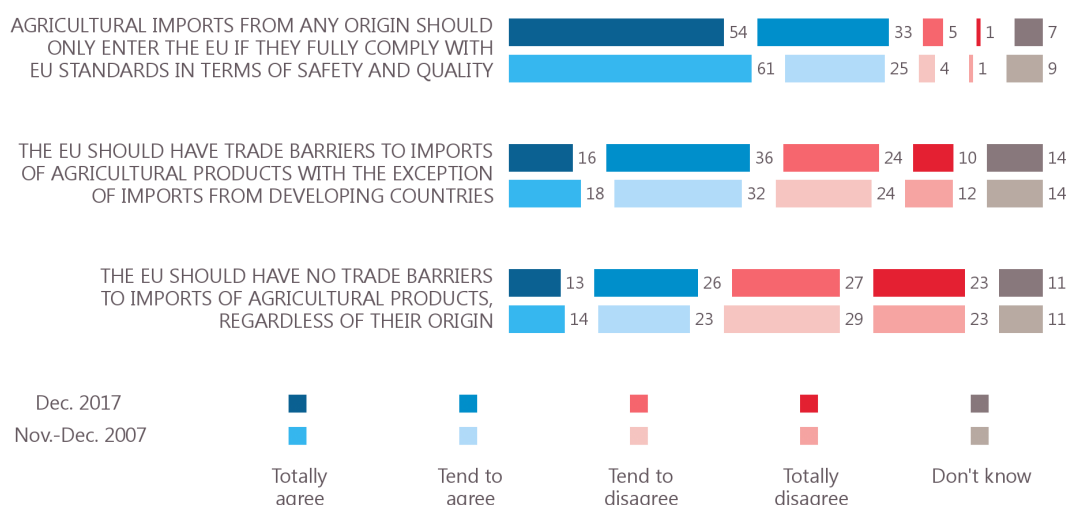
Almost nine in ten (87%) are in favour of agricultural imports from any origin only entering the EU if they fully comply with EU standards in terms of safety and quality, and over half (54%) totally agree³⁹. Just 6% disagree, while 7% say they don't know.

More than half (52%) agree the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries although less than one in five (16%) totally agree. Just over one third (34%) disagree while 14% don't know.

Only a minority (39%) agree the EU should have no trade barriers to imports of agricultural products regardless of their origin, with 13% totally agreeing. Half (50%) disagree, with 23% totally disagreeing. Just over one in ten (11%) say they don't know.

Overall agreement has changed little since 2007 (1-2 pp). However, respondents are now less likely to totally agree agricultural imports should only enter the EU if they fully comply with safety and quality standards (-7 pp) and are more likely to tend to agree (+8 pp).

QC19 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?
(% - EU)



³⁹ QC19 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements? 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 from any origin should only enter the EU if they fully comply with EU standards in terms of safety and quality. Totally agree; Tend to agree; Tend to disagree; Totally disagree; Don't know.

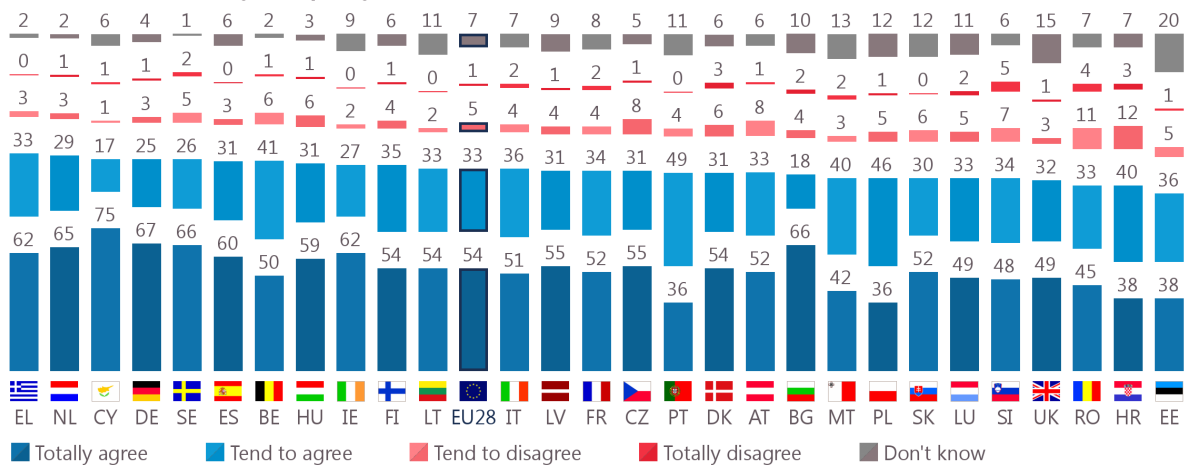
More than seven in ten respondents in each country agree agricultural imports should only enter the EU if they fully comply with safety and quality standards, with proportions ranging from 95% in Greece, 94% in the Netherlands and 92% in Germany, Cyprus and Sweden to 74% in Estonia and 78% in Romania and Croatia.

In 19 countries at least half totally agree, with the largest proportions seen in Cyprus (75%), Germany (67%), Bulgaria and Sweden (both 66%) to 40% in Romania and Croatia.

One in five respondents in Estonia say they don't know (20%).

QC19.3 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

Agricultural imports from any origin should only enter the EU if they fully comply with EU standards in terms of safety and quality (%)



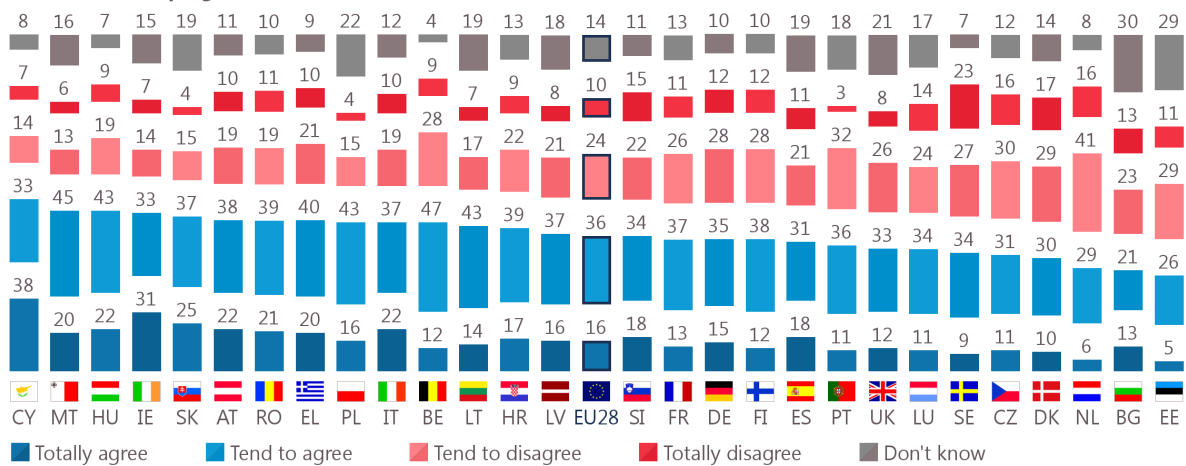
There is a wide range of opinion about whether the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries, although in 18 Member States at least half agree. Respondents in Cyprus (71%), Hungary, Malta (both 65%) and Ireland (64%) are the most likely to agree, compared to 31% in Estonia, 34% in Bulgaria and 35% in the Netherlands. Cyprus (38%) and Ireland (31%) are the only countries where more than three in ten totally agree.

In the Netherlands (57%) and Sweden (50%) at least half of all respondents disagree – in fact in Sweden 23% totally disagree.

There is a high level of don't know responding in a number of countries, including Bulgaria (30%) and Estonia (29%).

QC19.2 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries (%)



Respondents in Romania (49%), Malta, Poland and the United Kingdom (all 47%) are the most likely to agree that the EU should have no trade barriers to imports of agricultural products, regardless of their origin. This compares to 25% in Greece and 26% in France and Bulgaria.

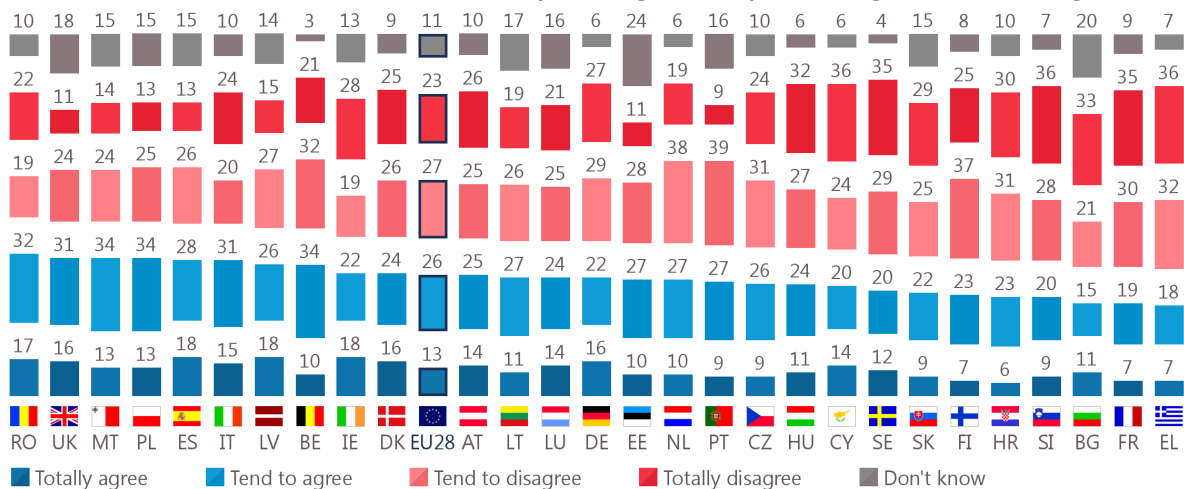
Respondents in Spain, Latvia and Ireland (all 18%) are the most likely to totally agree.

In 16 countries the majority disagree with this idea, with those in Greece (68%), France (65%), Slovenia and Sweden the most likely to do so.

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

QC19.1 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

The EU should have no trade barriers to imports of agricultural products, regardless of their origin (%)
































Compared to 2007, respondents in Spain, Ireland (both +14 pp) and Italy (+7 pp) are now more likely to **agree** that **agricultural imports should only enter the EU if they fully comply with safety and quality standards**. On the other hand, respondents in Estonia (-11 pp) and Slovakia (-7 pp) are now less likely to agree.

Respondents in Cyprus (+21 pp), Romania (+20 pp) and Ireland (+18 pp) are now much more likely to **agree** that **the EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries**. In contrast, respondents in Estonia (-17 pp) and the Netherlands (-15 pp) are now less likely to think this way.

Respondents in the United Kingdom, Ireland (both +14 pp) and Poland (+13 pp) are now more likely to **agree** that **the EU should have no trade barriers to imports of agricultural products, regardless of their origin** than they were in 2007. Those in Portugal (-18 pp), Denmark (-13 pp) and Sweden (-11 pp) are now less likely to agree.

QC19 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?
(% - TOTAL 'AGREE')

		Agricultural imports from any origin should only enter the EU if they fully comply with EU standards in terms of safety and quality		The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries		The EU should have no trade barriers to imports of agricultural products, regardless of their origin	
		2017	2017 - 2007	2017	2017 - 2007	2017	2017 - 2007
EU28		87	▲ 1	52	▲ 2	39	▲ 2
BE		91	▼ 3	59	▲ 2	44	▲ 4
BG		84	▲ 4	34	▲ 2	26	=
CZ		86	▼ 5	42	▼ 6	35	▲ 5
DK		85	▼ 4	40	▼ 9	40	▼ 13
DE		92	=	50	▲ 1	38	▲ 3
EE		74	▼ 11	31	▼ 17	37	▼ 10
IE		89	▲ 14	64	▲ 18	40	▲ 14
EL		95	▼ 1	60	=	25	▼ 5
ES		91	▲ 14	49	▲ 4	46	▲ 6
FR		86	▼ 6	50	▼ 5	26	▼ 2
HR		78	N.A	56	N.A	29	N.A
IT		87	▲ 7	59	▲ 11	46	=
CY		92	▼ 2	71	▲ 21	34	▲ 6
LV		86	▲ 6	53	▲ 1	44	▲ 6
LT		87	▲ 3	57	▲ 2	38	▲ 8
LU		82	▼ 5	45	▼ 4	38	▼ 3
HU		90	▼ 5	65	=	35	▲ 7
MT		82	▼ 2	65	▲ 14	47	▲ 8
NL		94	▲ 1	35	▼ 15	37	▼ 4
AT		85	▼ 5	60	▼ 1	39	▲ 3
PL		82	▼ 6	59	▲ 9	47	▲ 13
PT		85	▲ 3	47	▼ 12	36	▼ 18
RO		78	=	60	▲ 20	49	▼ 7
SI		82	▼ 6	52	▲ 1	29	▲ 3
SK		82	▼ 7	62	▲ 15	31	▼ 9
FI		89	▼ 3	50	▼ 1	30	▲ 3
SE		92	▲ 1	43	▼ 5	32	▼ 11
UK		81	▼ 2	45	▼ 6	47	▲ 14

Increases by 3 pp or more

Decreases by 3 pp or more





The **socio-demographic analysis** shows no difference in opinion based on urbanisation, but does illustrate the following:

- Men are more likely to agree that the **EU should have no trade barriers to imports of agricultural products, regardless of their origin** (42% vs 37% of women).
- Those aged 25+ are the most likely to agree that **agricultural imports from any origin should only enter the EU if they fully comply with EU safety and quality standards**. For instance, 90% of 40-54 year olds agree, compared to 84% of 15-24 year olds.
- The longer a respondent remained in education, the more likely they are to agree that **agricultural imports from any origin should only enter the EU if they fully comply with EU safety and quality standards**: 91% of those who completed their education aged 20+ agree, compared to 81% of those who completed their education aged 15 or younger.
- Managers, the self-employed and other white collar workers are the most likely to agree that **agricultural imports from any origin should only enter the EU if they fully comply with EU safety and quality standards**.

In addition, respondents who think agriculture and rural areas are important for the future are more likely to agree that **agricultural imports from any origin should only enter the EU if they fully comply with EU safety and quality standards**. Almost nine in ten (89%) who think agriculture and rural areas are important agree imports from any origin should fully comply with standards, compared to 75% of respondents who think agriculture and rural areas are not important.

QC19 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

Total 'Agree' (% - EU)

	Agricultural imports from any origin should only enter the EU if they fully comply with EU standards in terms of safety and quality	The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries	The EU should have no trade barriers to imports of agricultural products, regardless of their origin
EU28	87	52	39
 Gender			
Man	88	53	42
Woman	86	50	37
 Age			
15-24	84	49	38
25-39	87	51	41
40-54	90	54	40
55 +	86	51	39
 Education (End of)			
15-	81	50	39
16-19	87	54	41
20+	91	50	38
Still studying	85	48	38
 Socio-professional category			
Self-employed	90	52	43
Managers	92	49	38
Other white collars	90	55	41
Manual workers	87	54	42
House persons	83	54	38
Unemployed	84	48	40
Retired	85	51	37
Students	85	48	38
Agriculture and rural areas			
Important	89	53	40
Not important	75	50	44

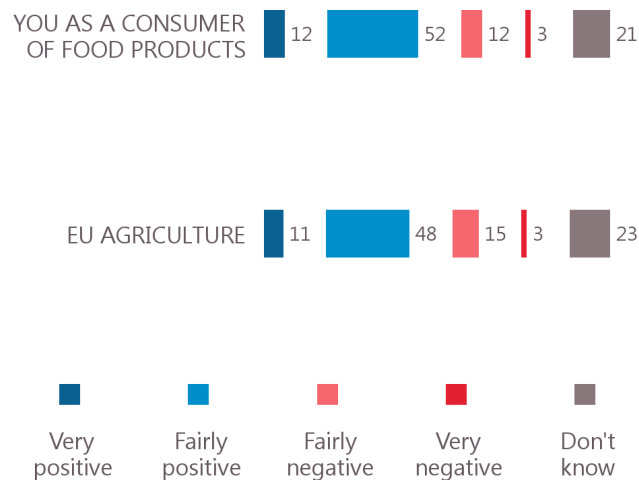
2 EU trade agreements and exchange of agricultural and food products

The majority think trade agreements are positive for EU agriculture and for them as a consumer

Almost two thirds (64%) of respondents think that trade agreements have been positive for them as a consumer: 12% think they have been very positive and 52% think they have been fairly positive⁴⁰. Overall 15% think they have been negative while just over one in five (21%) say they don't know.

Almost six in ten (59%) think that trade agreements have been positive for EU agriculture with 11% saying they have been very positive and 48% that they have been fairly positive. Almost one in five (18%) think they have been negative while 23% say they don't know.

QC20 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)



⁴⁰ QC20 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; You as a consumer of food products. Very positive; Fairly positive; Fairly negative; Very negative; Don't know.

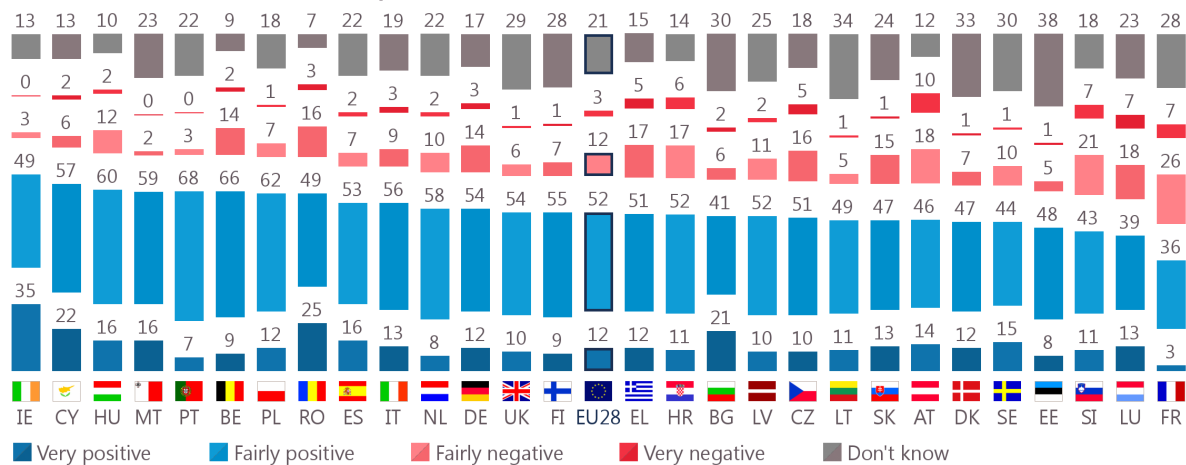
In all but one country the majority of respondents think that trade agreements have been positive for them as a consumer of food products. Those in Ireland (84%), Cyprus (79%) and Hungary (76%) are the most likely to agree, compared to 39% in France, 52% in Luxembourg and 54% in Slovenia.

More than one in five respondents in Ireland (35%), Romania (25%), Cyprus (22%) and Bulgaria (21%) totally agree.

It is worth noting that in 15 countries more than one in five say they don't know, with the largest proportions observed in Estonia (38%) and Lithuania (34%).

QC20.2 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 (%)

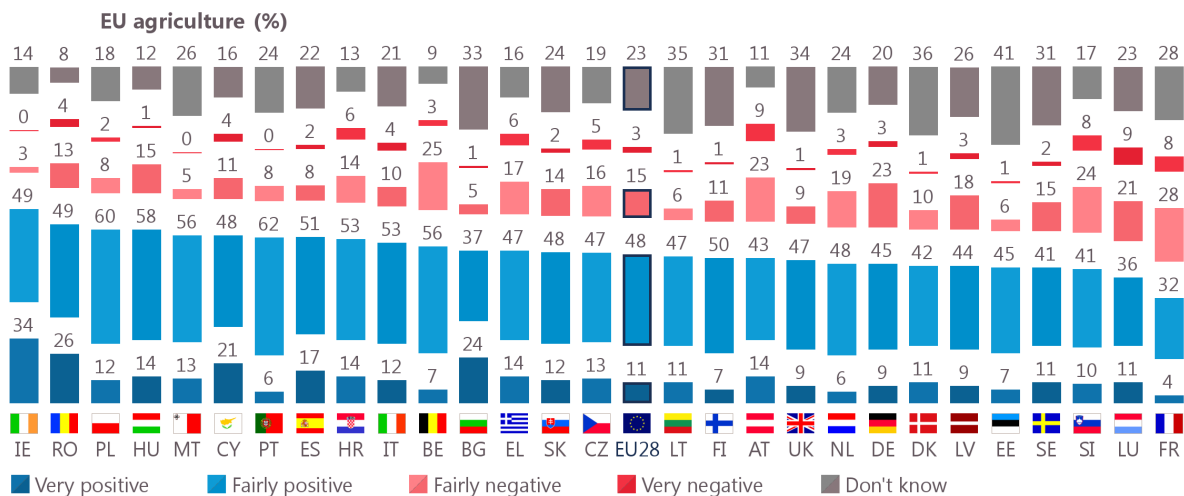


In 26 EU Member States a majority of respondents think that trade agreements have been positive for EU agriculture. Those in Ireland (83%), Romania (75%), Hungary and Poland (both 72%) are the most likely to think this way, compared to 36% in France, 47% in Luxembourg and 51% in Slovenia.

There are four countries where at least one in five thinks that these agreements have been very positive for EU agriculture: Ireland (34%), Romania (26%), Bulgaria (24%) and Cyprus (21%).

There are 17 countries where at least one in five say they don't know, with the highest proportions seen amongst those in Estonia (41%), Denmark (36%), Lithuania (35%) and the United Kingdom (34%).

QC20.1 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 ...?






The **socio-demographic analysis** illustrates the following:

- Those aged under 55 are the most likely to say that trade agreements have been positive in both areas. For instance, 68% of those aged 15-24 say they have been positive for them as a consumer, compared to 59% of those aged 55+.
- Those who completed their education aged 16 or older are the most likely to say that agreements have been positive in these two areas.
- Respondents living in large towns are the most likely to say that trade agreements have been positive in both areas. For example, 68% living in large towns say that agreements have been positive for them as consumers, compared to 63% living in rural villages and 62% living in small towns.

In addition, respondents who think agriculture and rural areas are important for the future are more likely to think that agreements have been positive in each of these areas. For instance, 60% say agreements have been positive for EU agriculture, compared to 49% who think these are not important.

QC20 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 ...?

Total 'Positive' (% - EU)

	You as a consumer of food products	EU agriculture
EU28	64	59
 Age		
15-24	68	60
25-39	68	63
40-54	65	59
55 +	59	56
 Education (End of)		
15-	59	54
16-19	66	61
20+	64	57
Still studying	68	60
 Subjective urbanisation		
Rural village	63	59
Small/ mid-size town	62	56
Large town	68	63
Agriculture and rural areas		
Important	65	60
Not important	53	49

CONCLUSION

Almost all respondents think agriculture and rural areas are important for Europe's future. Opinions about the situation of rural areas compared to the last ten years, however, are less clear-cut and are quite negative in many European countries.

The CAP is seen to have been particularly good for communication services: almost two thirds of respondents are positive about the impact it has had on broadband Internet coverage and mobile phone services in rural areas over the last ten years. However, opinions are divided when it comes to social, health and cultural services, and social inclusion. Views are more inclined to be negative when considering the environment and landscape or economic growth and jobs.

Despite this mixed view of rural areas over the past ten years, support for the CAP remains high. More than six in ten are of the opinion that it benefits all European citizens and not just farmers. The majority of respondents believe the CAP is fulfilling its roles, particularly when it comes to ensuring a stable food supply. A large majority also think the CAP's priorities in strengthening the farmer's role in the food chain, developing research and innovation to support the agri-food sector and encouraging young people to enter the agricultural sector are important.

Respondents are generally positive about financial aid and subsidies for farmers. More than four in ten respondents think the amount of financial aid to farmers is about right, with around one quarter saying it is too low. More than four in ten want to see financial support to farmers increase over the next 10 years, and overall more than seven in ten thinks support should either remain the same or be increased. The important role farmers have in protecting the environment is reflected by the fact that almost nine in ten are in favour of the EU making subsidy payments to farmers for farming practices that are beneficial to the climate and the environment. However, large majorities also believe it is justified to reduce subsidies to farmers if food safety, environmental, or animal welfare standards are not respected.

Food safety and quality are a key priority for respondents, and this is highlighted throughout the report. Not only is providing safe, healthy food of high quality considered to be the main responsibility of farmers, it is also viewed as the main objective for agricultural and rural policy. Respondents also think ensuring supplies of healthy food in the long term should be the main priority for research and innovation in the agri-food sector. This highlights a strong link between what Europeans want from agriculture and what they expect from the CAP and agricultural policy. The emphasis of both public opinion and policy has shifted from ensuring food supply to focus on food quality and animal welfare and environmental standards. The CAP is seen by the majority to be successfully fulfilling its role in these areas.

When it comes to implementing policy, there is some variation in opinion about whether the European or national level is the most appropriate to manage a range of issues. Respondents are most likely to think that ensuring that agricultural products are of good quality, healthy and safe, securing food supply and ensuring a fair standard of living for farmers should be dealt with at the European level rather than at national level. Opinion is divided when it comes to ensuring reasonable food prices for consumers. In addition, at a country level there is not always a clear consensus about the most appropriate level of government to deal with each issue.

Only a minority of respondents are aware of various quality labels, with Fairtrade having the highest awareness. In fact, the Fairtrade logo and the organic farming logo are the only ones recognised by more than one in five respondents. For those who are aware of each label, however, these logos are an important factor in making purchasing decisions, although both awareness and importance vary considerably across Member States. Respect for local traditions, and knowing the geographical area of the product's origin are also important factors for respondents when buying food products.

Although a large majority of respondents say organic products are more expensive, they are also considered to have better quality, safety, welfare and environmental standards than non-organic food products. Availability is an issue: four in ten respondents say organic food products are not available locally – although this figure masks a wide variation across individual Member States.

In relation to importing agricultural products, the majority are in favour of trade barriers – particularly when it comes to compliance with EU safety and quality standards. The majority of respondents think trade agreements have been positive both for themselves as consumers and for EU agriculture as a whole.

A broad overview of the socio-demographic results is interesting – particularly considering a respondent's level of urbanisation. Although respondents living in rural areas are more likely to say agriculture and rural areas are important, the difference is relatively small. Moreover, those living in rural areas are less likely to say the CAP is fulfilling its role in the areas tested in the survey, and are less likely to be positive about the CAP's contribution to boosting investment and growth and increasing the number of jobs in the agriculture and food sectors, improving trade relations and mitigating the impact of climate change. Those living in rural areas are also less likely to agree the CAP benefits all Europeans, and less likely to think the current level of support is about right. Those living in rural areas are less positive about the impact of trade agreements for both consumers and EU agriculture.

Apart from this rural-urban divide, the view that agriculture and rural areas are important for the future is consistently – and often more strongly – associated with positive attitudes to the CAP, farmers subsidies and agriculture more generally. Weaker relationships are observed with education levels, although respondents with higher education levels are often more positive. There are few differences based on gender, and no consistent relationships with age or occupation.

TECHNICAL SPECIFICATIONS

Between the 2nd and the 11th December 2017, TNS opinion & social, a consortium created between TNS political & social, TNS UK and Kantar Belgium, and represented by the Kantar Belgium S.A. coordination centre, carried out the wave 88.4 of the EUROBAROMETER survey, at the request of the European Commission, Directorate-General for Communication, “Media monitoring and analysis” Unit.

The wave 88.4 includes the SPECIAL EUROBAROMETER 473 and covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	TNS Dimarso	1,001	02/12/2017	11/12/2017	9,693,779	2.25%
BG	Bulgaria	TNS BBSS	1,040	02/12/2017	10/12/2017	6,537,535	1.52%
CZ	Czech Rep.	TNS Aisa	1,023	02/12/2017	11/12/2017	9,238,431	2.14%
DK	Denmark	TNS Gallup DK	1,011	02/12/2017	11/12/2017	4,838,729	1.12%
DE	Germany	TNS Infratest	1,592	02/12/2017	10/12/2017	70,160,634	16.26%
EE	Estonia	TNS Emor	1,005	02/12/2017	10/12/2017	1,160,064	0.27%
IE	Ireland	Behaviour & Attitudes	1,004	02/12/2017	11/12/2017	3,592,162	0.83%
EL	Greece	TNS ICAP	1,010	02/12/2017	09/12/2017	9,937,810	2.30%
ES	Spain	TNS Spain	1,024	02/12/2017	09/12/2017	39,445,245	9.14%
FR	France	TNS Sofres	1,015	02/12/2017	10/12/2017	54,097,255	12.54%
HR	Croatia	HENDAL	1,031	02/12/2017	09/12/2017	3,796,476	0.88%
IT	Italy	TNS Italia	1,029	02/12/2017	10/12/2017	52,334,536	12.13%
CY	Rep. Of Cyprus	CYMAR	502	02/12/2017	09/12/2017	741,308	0.17%
LV	Latvia	TNS Latvia	1,000	02/12/2017	11/12/2017	1,707,082	0.40%
LT	Lithuania	TNS LT	1,013	02/12/2017	10/12/2017	2,513,384	0.58%
LU	Luxembourg	TNS ILReS	504	02/12/2017	11/12/2017	457,127	0.11%
HU	Hungary	TNS Hoffmann	1,038	02/12/2017	11/12/2017	8,781,161	2.04%
MT	Malta	MISCO	508	02/12/2017	10/12/2017	364,171	0.08%
NL	Netherlands	TNS NIPO	1,040	02/12/2017	11/12/2017	13,979,215	3.24%
AT	Austria	ipr Umfrageforschung	1,021	02/12/2017	10/12/2017	7,554,711	1.75%
PL	Poland	TNS Polska	997	02/12/2017	11/12/2017	33,444,171	7.75%
PT	Portugal	TNS Portugal	1,089	02/12/2017	09/12/2017	8,480,126	1.97%
RO	Romania	TNS CSOP	1,005	02/12/2017	11/12/2017	16,852,701	3.91%
SI	Slovenia	Mediana	1,042	02/12/2017	10/12/2017	1,760,032	0.41%
SK	Slovakia	TNS Slovakia	1,089	02/12/2017	11/12/2017	4,586,024	1.06%
FI	Finland	TNS Gallup Oy	1,024	02/12/2017	11/12/2017	4,747,810	1.10%
SE	Sweden	TNS Sifo	1,036	02/12/2017	11/12/2017	7,998,763	1.85%
UK	United Kingdom	TNS UK	1,338	02/12/2017	09/12/2017	52,651,777	12.20%
TOTAL EU28			28,031	02/12/2017	11/12/2017	431,452,219	100%*

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was 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 II¹ (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas.

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"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS opinion & social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed here.

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%	

¹ Figures updated in August 2015

QUESTIONNAIRE

ASK ALL

QC1 Do you think that, in the EU, agriculture and rural areas are ... for our future?

(READ OUT - ONE ANSWER ONLY)

- | | |
|----------------------|---|
| Very important | 1 |
| Fairly important | 2 |
| Not very important | 3 |
| Not at all important | 4 |
| DK | 5 |

EB84.2 QC1

QC2 Have you ever heard of the support that the EU gives farmers through its Common Agricultural Policy (CAP)? (M)

(READ OUT - ONE ANSWER ONLY)

- | | |
|--|---|
| Yes, and you know the details | 1 |
| Yes, but you don't really know the details | 2 |
| No, you have never heard of it | 3 |
| DK | 4 |

EB84.2 QC2

QC3 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.

(READ OUT - ONE ANSWER ONLY)

- | | |
|------------------|---|
| Totally agree | 1 |
| Tend to agree | 2 |
| Tend to disagree | 3 |
| Totally disagree | 4 |
| DK | 5 |

EB84.2 QC3

QC4 In your opinion, which of the following should be the main objectives of the EU in terms of agriculture and rural development policy?

(SHOW SCREEN - READ OUT - MULTIPLE ANSWERS POSSIBLE)

- Ensuring a fair standard of living for farmers 1,
- Creating growth and jobs in rural areas (M) 2,
- Ensuring reasonable food prices for consumers 3,
- Securing a stable supply of food in the EU 4,
- Ensuring a sustainable way to produce food 5,
- Protecting the environment and tackling climate change 6,
- Providing safe, healthy food of high quality (M) 7,
- Other (SPONTANEOUS) 8,
- DK 9,

EB84.2 QC4

QC5 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	Ensuring a fair standard of living for farmers	1	2	3	4	5
2	Creating growth and jobs in rural areas (M)	1	2	3	4	5
3	Ensuring reasonable food prices for consumers	1	2	3	4	5
4	Securing a stable supply of food in the EU (M)	1	2	3	4	5
5	Ensuring a sustainable way to produce food (N)	1	2	3	4	5
6	Protecting the environment and tackling climate change	1	2	3	4	5
7	Providing safe, healthy food of high quality (M)	1	2	3	4	5

EB84.2 QC5 MODIFIED

QC6 What do you think should be the two main responsibilities of farmers in our society?*(SHOW SCREEN - READ OUT- MAX. 2 ANSWERS)*

- Protecting the environment and tackling climate change (M) 1,
- Creating growth and jobs in rural areas (M) 2,
- Securing a stable supply of food in the EU (M) 3,
- Providing safe, healthy food of high quality (N) 4,
- Supplying the population with a diversity of quality products 5,
- Ensuring the welfare of farmed animals 6,
- Encouraging and improving life in the countryside 7,
- Other (SPONTANEOUS) 8,
- DK 9,

EB84.2 QC6 MODIFIED

QC7 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?*(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE) (M)*

		Very important	Fairly important	Not very important	Not at all important	DK
1	Developing research and innovation to support the agri-food sector (M)	1	2	3	4	5
2	Strengthening the farmer's role in the food chain	1	2	3	4	5
3	Encouraging young people to enter the agricultural sector	1	2	3	4	5

EB84.2 QC7 MODIFIED

QC8 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	Boosting investment and growth, and increasing the number of jobs in the agriculture and food sectors (M)	1	2	3	4	5
2	Helping the smooth running of the EU Single Market	1	2	3	4	5
3	Improving trade relations between the EU and the rest of the world	1	2	3	4	5
4	Mitigating the impact of climate change	1	2	3	4	5
5	Extending coverage of broadband Internet and communication services in rural areas	1	2	3	4	5

EB84.2 QC8

QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% of the total EU budget. Do you think that this support is too low, about right or too high? (M)

(ONE ANSWER ONLY)

Too low	1
About right	2
Too high	3
DK	4

EB84.2 QC9

QC10 What do you think are the main reasons why the EU spends a significant proportion of its budget (almost 40% of the total EU budget) on the Common Agricultural Policy (CAP)?

(SHOW SCREEN - READ OUT - MAX. 2 ANSWERS)

- | | |
|---|----|
| Agriculture is a sector financed almost entirely by the EU budget, rather than at national or local level | 1, |
| Financial aid to farmers makes it possible to guarantee the food supply of Europeans | 2, |
| Agriculture requires heavy human and financial investments | 3, |
| Financial aid to farmers makes it possible to ensure sustainable farming (M) | 4, |
| The production of food products in the EU is more expensive than in other countries, because of stricter standards, e.g. animal welfare | 5, |
| Addressing the environment and climate change issues in rural areas (N) | 6, |
| Other (SPONTANEOUS) | 7, |
| None, this proportion is not justifiable (SPONTANEOUS) | 8, |
| DK | 9, |

EB84.2 QC10 MODIFIED

QC11 And over the next 10 years, would you like to see an increase, decrease or no change in EU financial support to farmers? (M)

(READ OUT - ONE ANSWER ONLY)

- | | |
|-----------|---|
| Increase | 1 |
| Decrease | 2 |
| No change | 3 |
| DK | 4 |

EB84.2 QC11

QC12 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level. (M)

(READ OUT - ONE ANSWER PER LINE)

		European level	National level	Regional or local level	DK
1	Ensuring a fair standard of living for farmers (M)	1	2	3	4
2	Ensuring reasonable food prices for consumers (M)	1	2	3	4
3	Securing food supply (M)	1	2	3	4
4	Ensuring that agricultural products are of good quality, healthy and safe (M)	1	2	3	4

EB72.5 QB4 MODIFIED

QC13 How important or not are the following factors in your decision to buy food products?

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Very important	Fairly important	Not very important	Not at all important	You do not buy food products (SPONTANEOUS)	DK
1	They come from a geographical area that you know	1	2	3	4	5	6
2	They respect local tradition and "know-how"	1	2	3	4	5	6
3	They have a specific label ensuring the quality of the product	1	2	3	4	5	6

NEW

QC14 **Which of the logos are you aware of? (M)**
(SHOW LOGOS - MULTIPLE ANSWERS POSSIBLE)



1,



2,



3,



4,



5,

None (SPONTANEOUS)

6,

DK

7,

EB84.2 QC12

ASK QC15.1 IF QC14=1**ASK QC15.2 IF QC14=3****ASK QC15.3 IF QC14=4****ASK QC15.4 IF QC14=5****QC15 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?***(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)*

		Very important	Fairly important	Not very important	Not important at all	You do not buy food products (SPONTANEOUS)	DK
1		1	2	3	4	5	6
2		1	2	3	4	5	6
3		1	2	3	4	5	6
4		1	2	3	4	5	6

NEW

QC16 Do you agree or not with the following statements about food products coming from 'organic' agriculture?

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	They are safer than other food products	1	2	3	4	5
2	They are of better quality than other food products	1	2	3	4	5
3	They are more expensive than other food products	1	2	3	4	5
4	They taste better than other food products	1	2	3	4	5
5	They are produced using better environmental practices than other food products	1	2	3	4	5
6	They are produced with a very restricted use of pesticides, fertilisers or antibiotics	1	2	3	4	5
7	They respect higher animal welfare standards than other food products	1	2	3	4	5
8	They are difficult to find in the supermarkets, shops or markets in the area where you live	1	2	3	4	5

NEW

QC17 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...? (M)

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Totally justified	Somewhat justified	Somewhat unjustified	Totally unjustified	DK
1	Food safety standards	1	2	3	4	5
2	Animal welfare standards	1	2	3	4	5
3	Environmental standards	1	2	3	4	5

EB84.2 QC14

QC18 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? (M)

(READ OUT - ONE ANSWER ONLY)

Totally in favour	1
Somewhat in favour	2
Somewhat opposed	3
Totally opposed	4
DK	5

EB84.2 QC15

(READ OUT): Now I would like to ask you a question about international trade in agricultural products. (M)

QC19 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements? (M)

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	The EU should have no trade barriers to imports of agricultural products, regardless of their origin	1	2	3	4	5
2	The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries	1	2	3	4	5
3	Agricultural imports from any origin should only enter the EU if they fully comply with EU standards in terms of safety and quality (M)	1	2	3	4	5

EB68.2 QE9

QC20 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 ...?

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Very positive	Fairly positive	Fairly negative	Very negative	DK
1	EU agriculture	1	2	3	4	5
2	You as a consumer of food products	1	2	3	4	5

NEW

QC21 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

(SHOW SCREEN - READ OUT - ONE ANSWER PER LINE)

		Improved	Got worse	Stayed about the same	DK
1	Economic growth and jobs	1	2	3	4
2	The environment and landscape	1	2	3	4
3	Broadband Internet coverage and mobile phone services	1	2	3	4
4	Access to social, health and cultural services	1	2	3	4
5	The participation of all individuals in social and economic life (i.e. social inclusion)	1	2	3	4

NEW

QC22 Which of the following should be the priority for research and innovation in the agri-food sector?

(SHOW SCREEN - READ OUT - MAX. 2 ANSWERS)






























- Ensuring supplies of healthy food in the long term 1,
- Contributing to a better management of natural resources 2,
- Providing sustainable solutions to protect plants and animals from diseases and pests 3,
- Supporting the development of ecological approaches to farming 4,
- Promoting sustainable growth and job creation in rural areas 5,
- Developing and sharing knowledge in farming and rural areas 6,
- Other (SPONTANEOUS) 7,
- None (SPONTANEOUS) 8,
- DK 9,

NEW






























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Tables

QC1 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	Total 'Important'		Total 'Not important'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		53	-9	39	7	4	1	1	0	3	92	-2	5	1
BE		51	-16	46	19	3	-2	0	-1	0	97	3	3	-3
BG		58	-16	31	10	3	1	1	1	7	89	-6	4	2
CZ		48	-13	41	9	7	3	1	0	3	89	-4	8	3
DK		58	-8	35	5	4	0	1	1	2	93	-3	5	1
DE		55	-3	39	4	3	-2	1	0	2	94	1	4	-2
EE		52	-18	40	15	3	0	1	1	4	92	-3	4	1
IE		57	-19	36	15	2	0	0	0	5	93	-4	2	0
EL		64	-8	30	5	4	2	1	0	1	94	-3	5	2
ES		56	-12	40	11	2	0	0	-1	2	96	-1	2	-1
FR		63	-7	30	5	4	1	1	0	2	93	-2	5	1
HR		46	-16	41	9	8	4	2	1	3	87	-7	10	5
IT		40	-10	50	5	4	2	1	1	5	90	-5	5	3
CY		62	-13	30	10	5	1	1	0	2	92	-3	6	1
LV		58	-13	32	14	5	0	2	-2	3	90	1	7	-2
LT		48	-16	44	13	6	3	1	0	1	92	-3	7	3
LU		72	-13	23	9	2	1	1	1	2	95	-4	3	2
HU		40	-16	49	11	7	3	1	0	3	89	-5	8	3
MT		51	-29	41	25	3	1	0	-1	5	92	-4	3	0
NL		55	2	39	-1	5	0	0	-1	1	94	1	5	-1
AT		47	-8	43	5	7	2	1	0	2	90	-3	8	2
PL		45	-6	48	5	2	-2	1	0	4	93	-1	3	-2
PT		48	-13	50	12	1	0	0	0	1	98	-1	1	0
RO		48	-21	37	11	10	8	2	1	3	85	-10	12	9
SI		64	-17	29	12	3	2	2	1	2	93	-5	5	3
SK		62	-14	32	10	2	1	1	0	3	94	-4	3	1
FI		61	-11	34	9	3	0	1	1	1	95	-2	4	1
SE		67	-6	28	4	2	0	2	1	1	95	-2	4	1
UK		54	-12	34	10	4	0	2	0	6	88	-2	6	0

QC2 Have you ever heard of 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	Total 'Yes'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2
EU28		10	0	57	-2	32	2	1	67	-2
BE		6	0	56	-3	38	4	0	62	-3
BG		8	-4	74	1	16	2	2	82	-3
CZ		5	-1	60	-7	34	8	1	65	-8
DK		10	1	78	0	12	0	0	88	1
DE		10	2	63	-1	25	-2	2	73	1
EE		6	0	70	-9	22	9	2	76	-9
IE		13	-7	53	2	33	5	1	66	-5
EL		10	4	60	-4	30	0	0	70	0
ES		6	0	50	-1	43	0	1	56	-1
FR		13	5	60	-8	27	3	0	73	-3
HR		7	-2	59	0	33	2	1	66	-2
IT		4	-1	40	-2	54	3	2	44	-3
CY		12	-6	57	3	31	4	0	69	-3
LV		11	-1	71	-6	17	7	1	82	-7
LT		14	-10	75	6	10	3	1	89	-4
LU		15	5	57	-12	27	7	1	72	-7
HU		6	-4	55	-10	38	14	1	61	-14
MT		7	-3	57	-3	32	3	4	64	-6
NL		10	-3	75	1	15	2	0	85	-2
AT		16	2	55	-3	28	2	1	71	-1
PL		11	-7	70	5	17	2	2	81	-2
PT		4	-5	71	5	24	-1	1	75	0
RO		13	-5	51	1	34	4	2	64	-4
SI		12	0	68	-3	20	3	0	80	-3
SK		4	-1	63	-6	28	3	5	67	-7
FI		12	0	78	-3	9	2	1	90	-3
SE		13	-2	78	-2	9	4	0	91	-4
UK		15	5	45	-2	37	-4	3	60	3

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Tables

QC3 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	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		15	-4	46	3	15	-1	4	-2	20	61	-1	19	-3
BE		12	-7	57	11	21	1	2	-3	8	69	4	23	-2
BG		33	-5	40	0	9	1	3	1	15	73	-5	12	2
CZ		16	-6	47	1	21	3	5	-1	11	63	-5	26	2
DK		19	-3	48	5	15	-4	3	-3	15	67	2	18	-7
DE		15	-6	47	4	17	-1	5	0	16	62	-2	22	-1
EE		23	-9	44	0	12	1	4	0	17	67	-9	16	1
IE		22	-5	42	2	8	-4	2	-1	26	64	-3	10	-5
EL		21	-4	50	0	15	1	3	-1	11	71	-4	18	0
ES		18	-4	44	8	12	-6	5	-3	21	62	4	17	-9
FR		9	-2	34	0	23	0	8	-5	26	43	-2	31	-5
HR		20	-9	53	7	11	-3	6	2	10	73	-2	17	-1
IT		14	-1	49	-4	11	2	3	-1	23	63	-5	14	1
CY		46	-2	34	2	10	1	1	-4	9	80	0	11	-3
LV		27	-3	47	9	13	-6	4	-3	9	74	6	17	-9
LT		20	-6	58	5	14	2	3	-2	5	78	-1	17	0
LU		20	-1	42	-4	12	-4	4	-4	22	62	-5	16	-8
HU		20	-4	53	2	13	0	5	-2	9	73	-2	18	-2
MT		31	-21	48	13	5	1	1	-1	15	79	-8	6	0
NL		18	-8	44	1	18	0	5	-1	15	62	-7	23	-1
AT		23	1	45	0	14	-2	6	-1	12	68	1	20	-3
PL		17	-2	62	6	7	-5	1	-1	13	79	4	8	-6
PT		12	0	49	1	9	-9	3	-2	27	61	1	12	-11
RO		25	-9	43	4	14	4	4	-1	14	68	-5	18	3
SI		32	-6	48	15	12	-4	3	-5	5	80	9	15	-9
SK		24	0	46	0	15	-4	4	-1	11	70	0	19	-5
FI		20	-2	54	1	13	-3	3	-1	10	74	-1	16	-4
SE		18	-1	43	3	19	-6	8	-1	12	61	2	27	-7
UK		9	-2	41	3	13	-3	3	-3	34	50	1	16	-6






























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Tables






























QC4 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)
(%)

		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		Ensuring a sustainable way to produce food		Protecting the environment and tackling climate change		Providing safe, healthy food of high quality		Other (SPONTANEOUS)		Don't know
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	
EU28		48	-1	45	N.A	49	-2	38	-2	46	3	50	6	62	6	1	0	6
BE		55	-7	34	N.A	54	2	41	-1	53	7	52	6	67	6	0	-1	0
BG		48	5	54	N.A	56	1	33	8	36	7	36	8	66	10	0	-1	7
CZ		45	3	41	N.A	63	3	39	-1	45	-3	45	4	66	5	1	0	3
DK		45	3	46	N.A	48	-3	47	6	69	8	69	12	74	7	1	-1	2
DE		50	-1	37	N.A	49	-3	50	-6	54	5	59	12	68	11	1	0	3
EE		48	-3	64	N.A	60	3	44	2	53	-1	49	14	70	11	1	0	5
IE		48	-8	48	N.A	48	-6	41	-3	46	1	42	2	57	9	1	0	8
EL		54	-4	57	N.A	69	-5	38	-5	45	-3	52	2	69	0	1	-1	1
ES		56	-6	60	N.A	49	-12	38	1	46	1	53	6	57	0	1	0	4
FR		69	6	48	N.A	51	-1	35	6	47	12	65	16	71	-1	1	-1	4
HR		41	-4	46	N.A	51	-2	32	-8	37	-6	30	-3	50	7	2	1	3
IT		30	5	43	N.A	41	-3	24	-1	37	3	43	0	58	8	1	-1	7
CY		49	-6	60	N.A	62	-3	35	4	48	2	64	15	74	9	1	1	2
LV		47	3	62	N.A	54	7	33	8	38	4	35	3	62	8	1	0	3
LT		43	-3	60	N.A	61	7	37	4	33	2	42	6	56	-11	1	0	2
LU		55	-5	36	N.A	41	-13	39	-16	43	0	54	2	61	-10	5	5	5
HU		32	-4	41	N.A	51	-3	35	-1	34	-1	34	-1	55	-1	1	0	3
MT		46	-15	39	N.A	51	-8	38	-10	44	-10	49	-11	63	-8	1	0	8
NL		51	4	32	N.A	45	4	51	-3	70	11	72	22	79	7	0	-1	1
AT		52	-1	45	N.A	50	-4	47	-8	50	-3	53	-3	64	3	3	-2	2
PL		35	2	35	N.A	49	-4	33	-7	33	-3	35	3	50	9	2	1	7
PT		51	5	55	N.A	61	4	44	-6	51	2	46	6	70	10	0	0	6
RO		48	-11	55	N.A	50	-3	33	-4	34	-5	39	-5	56	3	3	1	5
SI		42	-4	42	N.A	56	3	41	-5	44	4	42	5	68	3	2	0	2
SK		42	-6	47	N.A	53	-9	41	-3	43	-1	39	2	58	0	3	2	3
FI		65	6	50	N.A	55	1	59	-3	59	9	53	13	75	13	1	0	3
SE		65	12	59	N.A	45	12	57	6	74	11	79	13	84	16	1	0	1
UK		39	-15	40	N.A	41	2	34	-5	42	-1	38	-2	48	5	1	0	16






























QC5.1 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 (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		17	-1	39	5	22	-2	8	-3	14	56	4	30	-5
BE		12	-8	46	9	26	1	8	-4	8	58	1	34	-3
BG		24	-2	33	2	21	2	9	-1	13	57	0	30	1
CZ		14	-4	45	10	23	-5	7	-2	11	59	6	30	-7
DK		13	1	44	9	20	-7	3	-6	20	57	10	23	-13
DE		21	0	37	0	26	0	6	-2	10	58	0	32	-2
EE		7	-5	30	8	26	-5	9	-8	28	37	3	35	-13
IE		27	2	43	-1	8	-2	2	-1	20	70	1	10	-3
EL		14	-2	34	-1	33	9	12	-6	7	48	-3	45	3
ES		17	-4	38	15	17	-7	10	-11	18	55	11	27	-18
FR		7	-4	21	-2	34	1	25	4	13	28	-6	59	5
HR		16	-5	46	9	24	2	7	-3	7	62	4	31	-1
IT		27	8	42	2	13	0	5	-1	13	69	10	18	-1
CY		14	-12	46	10	21	4	5	-6	14	60	-2	26	-2
LV		12	-5	32	6	30	-1	13	-5	13	44	1	43	-6
LT		15	-3	54	6	18	-3	3	-2	10	69	3	21	-5
LU		15	-5	30	-3	27	0	14	2	14	45	-8	41	2
HU		25	-2	46	4	15	-4	3	-2	11	71	2	18	-6
MT		16	-9	50	7	7	-4	3	-2	24	66	-2	10	-6
NL		16	-11	45	8	22	1	5	-2	12	61	-3	27	-1
AT		27	6	40	3	21	-3	6	-5	6	67	9	27	-8
PL		23	6	52	10	12	-12	2	-3	11	75	16	14	-15
PT		13	-6	41	7	25	-4	3	-6	18	54	1	28	-10
RO		22	-8	41	12	22	7	7	-6	8	63	4	29	1
SI		14	-1	43	9	26	-3	8	-5	9	57	8	34	-8
SK		23	2	43	7	18	-8	6	-4	10	66	9	24	-12
FI		7	-5	39	-2	32	1	9	4	13	46	-7	41	5
SE		10	0	38	6	27	-3	7	-6	18	48	6	34	-9
UK		9	-3	40	7	20	-5	3	-4	28	49	4	23	-9






























QC5.2 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 (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		17	35	25	8	15	52	33
BE		9	40	35	6	10	49	41
BG		22	37	20	9	12	59	29
CZ		14	42	27	7	10	56	34
DK		11	37	25	4	23	48	29
DE		20	30	30	7	13	50	37
EE		8	28	28	13	23	36	41
IE		27	40	10	2	21	67	12
EL		12	30	36	15	7	42	51
ES		18	36	18	11	17	54	29
FR		5	23	37	18	17	28	55
HR		18	44	22	9	7	62	31
IT		30	39	14	5	12	69	19
CY		13	42	25	6	14	55	31
LV		12	30	31	14	13	42	45
LT		15	47	23	7	8	62	30
LU		11	30	32	9	18	41	41
HU		22	42	19	7	10	64	26
MT		18	43	12	3	24	61	15
NL		10	37	31	6	16	47	37
AT		26	35	24	7	8	61	31
PL		24	48	13	3	12	72	16
PT		16	31	33	4	16	47	37
RO		24	39	22	7	8	63	29
SI		12	40	28	9	11	52	37
SK		22	43	20	6	9	65	26
FI		7	30	37	11	15	37	48
SE		8	35	30	10	17	43	40
UK		8	34	22	5	31	42	27






























QC5.3 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 (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		19	0	41	4	21	-2	7	-3	12	60	4	28	-5
BE		14	-8	51	9	23	0	4	-3	8	65	1	27	-3
BG		18	-3	30	3	28	4	15	-5	9	48	0	43	-1
CZ		18	-3	34	8	28	-2	14	-3	6	52	5	42	-5
DK		14	0	52	4	15	-4	4	-2	15	66	4	19	-6
DE		30	6	43	-1	19	-1	4	-1	4	73	5	23	-2
EE		7	-6	33	-4	28	4	10	-1	22	40	-10	38	3
IE		26	0	45	4	9	-3	2	-4	18	71	4	11	-7
EL		13	-3	28	4	39	8	17	-7	3	41	1	56	1
ES		16	-3	38	13	19	-6	10	-11	17	54	10	29	-17
FR		7	-4	33	7	30	-3	16	-1	14	40	3	46	-4
HR		16	-6	44	4	27	6	7	-2	6	60	-2	34	4
IT		31	8	40	1	14	-2	5	-4	10	71	9	19	-6
CY		13	-9	41	10	26	4	12	-6	8	54	1	38	-2
LV		12	-5	28	-2	35	5	14	-1	11	40	-7	49	4
LT		12	0	35	-1	32	1	15	0	6	47	-1	47	1
LU		18	-2	35	-4	26	0	7	-2	14	53	-6	33	-2
HU		23	-6	40	2	22	2	6	-2	9	63	-4	28	0
MT		13	-10	47	8	18	-1	5	-2	17	60	-2	23	-3
NL		19	-9	50	4	18	5	4	-1	9	69	-5	22	4
AT		27	4	42	4	20	-5	7	-2	4	69	8	27	-7
PL		21	4	47	6	17	-6	4	-4	11	68	10	21	-10
PT		15	-6	41	4	27	-1	3	-3	14	56	-2	30	-4
RO		23	-7	36	5	26	10	7	-4	8	59	-2	33	6
SI		15	-1	37	7	28	-3	11	-3	9	52	6	39	-6
SK		24	3	36	-1	25	-3	8	0	7	60	2	33	-3
FI		10	-4	54	5	20	-5	4	-1	12	64	1	24	-6
SE		8	-4	44	3	23	1	6	-2	19	52	-1	29	-1
UK		10	-2	45	3	19	0	4	-1	22	55	1	23	-1






























QC5.4 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 (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		21	-2	51	4	12	0	3	-1	13	72	2	15	-1
BE		15	-9	60	7	15	3	2	-1	8	75	-2	17	2
BG		22	-9	42	-1	12	4	3	0	21	64	-10	15	4
CZ		23	-4	50	4	15	1	4	-1	8	73	0	19	0
DK		21	-2	53	6	8	-3	2	-1	16	74	4	10	-4
DE		35	2	49	0	10	1	1	-1	5	84	2	11	0
EE		13	-8	51	0	10	2	2	-2	24	64	-8	12	0
IE		27	2	49	0	4	-2	1	-1	19	76	2	5	-3
EL		21	2	54	2	14	1	4	-5	7	75	4	18	-4
ES		19	-4	48	9	10	-8	4	-2	19	67	5	14	-10
FR		7	-6	49	2	20	6	7	0	17	56	-4	27	6
HR		15	-11	59	15	14	-1	4	-2	8	74	4	18	-3
IT		26	2	49	3	11	2	2	-1	12	75	5	13	1
CY		19	-11	51	6	13	3	1	-3	16	70	-5	14	0
LV		18	-5	48	1	14	0	4	-1	16	66	-4	18	-1
LT		18	-3	65	6	8	-2	1	-1	8	83	3	9	-3
LU		20	-1	48	-6	14	2	3	-1	15	68	-7	17	1
HU		28	-4	52	2	10	0	2	0	8	80	-2	12	0
MT		16	-15	56	12	7	1	1	-2	20	72	-3	8	-1
NL		23	-19	54	12	10	4	2	0	11	77	-7	12	4
AT		32	3	49	-1	11	0	3	-1	5	81	2	14	-1
PL		20	0	59	4	8	-4	2	-1	11	79	4	10	-5
PT		14	-7	60	10	9	-8	2	0	15	74	3	11	-8
RO		23	-7	45	9	17	5	6	-1	9	68	2	23	4
SI		19	-3	51	6	17	0	3	-3	10	70	3	20	-3
SK		24	1	55	-2	11	-1	2	0	8	79	-1	13	-1
FI		17	-8	60	4	10	1	1	0	12	77	-4	11	1
SE		10	-6	50	8	18	0	4	-1	18	60	2	22	-1
UK		12	-1	50	2	10	-1	2	0	26	62	1	12	-1






























QC5.5 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 (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		18	44	19	5	14	62	24
BE		14	51	22	4	9	65	26
BG		21	37	16	5	21	58	21
CZ		18	50	18	4	10	68	22
DK		14	40	24	7	15	54	31
DE		23	38	26	7	6	61	33
EE		7	44	17	4	28	51	21
IE		26	46	8	1	19	72	9
EL		14	43	23	7	13	57	30
ES		16	46	13	6	19	62	19
FR		7	40	26	11	16	47	37
HR		15	55	18	4	8	70	22
IT		28	46	11	3	12	74	14
CY		17	52	14	3	14	69	17
LV		13	43	20	6	18	56	26
LT		14	52	16	3	15	66	19
LU		16	41	20	9	14	57	29
HU		21	51	15	3	10	72	18
MT		21	51	8	1	19	72	9
NL		27	38	21	4	10	65	25
AT		28	38	20	8	6	66	28
PL		21	50	11	3	15	71	14
PT		15	53	11	2	19	68	13
RO		23	43	18	4	12	66	22
SI		18	45	22	4	11	63	26
SK		22	50	14	2	12	72	16
FI		9	50	24	3	14	59	27
SE		8	40	29	7	16	48	36
UK		10	44	16	3	27	54	19






























QC5.6 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 (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		19	0	38	2	22	0	8	-1	13	57	2	30	-1
BE		15	-7	45	7	26	2	7	-2	7	60	0	33	0
BG		18	-3	36	4	20	0	7	-1	19	54	1	27	-1
CZ		19	-2	43	6	23	-2	4	-4	11	62	4	27	-6
DK		17	6	34	-2	27	0	10	-1	12	51	4	37	-1
DE		24	0	28	-8	31	6	11	3	6	52	-8	42	9
EE		7	-5	38	3	22	5	5	-3	28	45	-2	27	2
IE		25	1	44	6	10	-6	3	-1	18	69	7	13	-7
EL		17	3	42	6	27	5	8	-9	6	59	9	35	-4
ES		17	-5	41	7	16	-5	10	-1	16	58	2	26	-6
FR		8	-2	27	1	32	3	19	1	14	35	-1	51	4
HR		13	-10	55	13	19	0	5	-2	8	68	3	24	-2
IT		31	5	41	1	12	1	5	-2	11	72	6	17	-1
CY		25	-3	42	5	18	4	7	-4	8	67	2	25	0
LV		12	-5	39	3	24	2	9	-1	16	51	-2	33	1
LT		13	-2	51	6	20	-3	5	-1	11	64	4	25	-4
LU		18	-3	26	-11	27	3	16	6	13	44	-14	43	9
HU		21	-9	46	1	20	5	4	1	9	67	-8	24	6
MT		14	-13	50	7	14	3	3	-1	19	64	-6	17	2
NL		31	-8	33	-2	22	8	6	0	8	64	-10	28	8
AT		28	6	35	-3	22	-3	9	0	6	63	3	31	-3
PL		20	2	54	9	13	-5	3	-3	10	74	11	16	-8
PT		13	-5	37	-13	28	11	4	1	18	50	-18	32	12
RO		22	-7	42	11	19	4	6	-3	11	64	4	25	1
SI		14	0	41	6	26	-2	9	-3	10	55	6	35	-5
SK		23	3	44	0	18	-4	4	-1	11	67	3	22	-5
FI		10	-1	46	4	24	-4	5	-1	15	56	3	29	-5
SE		11	-1	43	9	26	-2	7	-5	13	54	8	33	-7
UK		8	-2	38	5	22	-3	5	-1	27	46	3	27	-4






























QC5.7 To what extent do you think the EU through the Common Agricultural Policy (CAP) is fulfilling its role in...?
Providing safe, healthy food of high quality (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		22	-2	42	1	19	2	6	-1	11	64	-1	25	1
BE		20	-10	51	8	18	3	4	-1	7	71	-2	22	2
BG		23	0	35	1	20	1	11	0	11	58	1	31	1
CZ		21	-4	36	1	26	3	10	0	7	57	-3	36	3
DK		20	1	44	3	19	-3	5	-1	12	64	4	24	-4
DE		28	-1	37	-2	26	5	5	0	4	65	-3	31	5
EE		11	-8	45	2	19	4	5	-2	20	56	-6	24	2
IE		30	-1	50	5	3	-3	1	-2	16	80	4	4	-5
EL		17	-2	51	7	22	2	6	-6	4	68	5	28	-4
ES		20	-4	47	10	11	-8	6	-3	16	67	6	17	-11
FR		10	-3	28	-6	33	9	17	0	12	38	-9	50	9
HR		20	-6	49	10	20	1	5	-2	6	69	4	25	-1
IT		34	5	42	-1	10	0	4	-2	10	76	4	14	-2
CY		25	-11	47	8	16	5	5	-3	7	72	-3	21	2
LV		16	-6	39	2	24	2	10	0	11	55	-4	34	2
LT		14	-4	48	2	26	5	5	-2	7	62	-2	31	3
LU		21	-8	29	-11	25	7	13	5	12	50	-19	38	12
HU		25	-7	48	3	15	0	4	1	8	73	-4	19	1
MT		24	-11	50	5	8	2	2	0	16	74	-6	10	2
NL		34	-22	43	12	13	7	3	1	7	77	-10	16	8
AT		29	2	41	-2	19	0	5	-1	6	70	0	24	-1
PL		22	6	50	0	14	-3	4	-1	10	72	6	18	-4
PT		17	-7	58	5	9	-5	2	0	14	75	-2	11	-5
RO		24	-9	38	7	24	10	6	-3	8	62	-2	30	7
SI		20	-3	44	7	23	-1	5	-2	8	64	4	28	-3
SK		25	3	41	-3	19	-2	7	0	8	66	0	26	-2
FI		20	-6	57	3	12	2	1	-1	10	77	-3	13	1
SE		15	-4	46	7	22	1	6	-4	11	61	3	28	-3
UK		14	-3	49	-1	12	3	2	-1	23	63	-4	14	2






























QC6 What do you think should be the two main responsibilities of farmers in our society? (MAX. 2 ANSWERS)
(%)

		Protecting the environment and tackling climate change	Creating growth and jobs in rural areas	Securing a stable supply of food in the EU	Providing safe, healthy 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
EU28		25	18	18	55	22	28	17	1	3
BE		31	12	24	62	27	25	12	1	0
BG		13	34	10	52	35	10	29	1	4
CZ		18	12	16	61	32	28	20	0	0
DK		47	12	16	58	10	41	7	1	2
DE		33	11	24	55	23	33	11	0	1
EE		13	32	15	51	25	12	31	1	5
IE		23	23	24	58	16	29	15	0	3
EL		23	24	14	60	28	21	23	2	1
ES		31	32	14	50	21	18	22	1	1
FR		33	14	11	60	20	34	15	1	2
HR		11	30	13	43	27	13	39	0	1
IT		19	25	11	55	18	30	21	1	4
CY		37	18	7	67	19	22	24	0	0
LV		14	38	9	48	29	11	32	1	2
LT		15	33	11	48	29	15	35	0	2
LU		27	7	15	60	16	47	7	2	2
HU		14	27	22	52	34	8	22	1	2
MT		28	12	16	56	24	26	17	1	3
NL		32	4	19	64	19	49	8	0	0
AT		26	17	22	44	28	33	20	0	1
PL		18	18	19	48	29	14	24	1	6
PT		13	20	24	62	26	24	17	0	3
RO		17	28	11	42	27	17	30	3	3
SI		20	10	18	64	30	19	19	2	2
SK		13	24	16	42	34	20	22	2	4
FI		18	13	28	62	15	38	16	1	2
SE		33	11	18	65	13	46	8	0	1
UK		17	14	24	55	12	37	10	0	9






























QC7.1 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?**Developing research and innovation to support the agri-food sector (%)**

		Very important	Fairly important	Not very important	Not at all important	Don't know	Total 'Important'	Total 'Not important'
EU28		34	50	7	1	8	84	8
BE		30	59	9	1	1	89	10
BG		51	37	3	0	9	88	3
CZ		34	51	9	1	5	85	10
DK		37	51	5	0	7	88	5
DE		32	50	10	2	6	82	12
EE		23	54	6	1	16	77	7
IE		48	40	1	1	10	88	2
EL		53	41	4	0	2	94	4
ES		40	47	4	1	8	87	5
FR		27	50	12	3	8	77	15
HR		31	54	10	1	4	85	11
IT		40	52	3	0	5	92	3
CY		61	33	2	1	3	94	3
LV		38	48	6	1	7	86	7
LT		37	52	4	1	6	89	5
LU		26	54	7	4	9	80	11
HU		38	47	8	1	6	85	9
MT		38	47	2	0	13	85	2
NL		30	52	11	1	6	82	12
AT		32	48	14	2	4	80	16
PL		31	58	4	1	6	89	5
PT		30	64	1	0	5	94	1
RO		46	39	8	3	4	85	11
SI		39	51	6	1	3	90	7
SK		45	45	3	1	6	90	4
FI		34	55	4	1	6	89	5
SE		42	48	6	1	3	90	7
UK		29	47	4	1	19	76	5

QC7.2 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Strengthening the farmer's role in the food chain (%)






























		Very important		Fairly important		Not very important		Not at all important		Don't know	Total 'Important'		Total 'Not important'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		38	-7	50	7	5	-1	1	0	6	88	0	6	-1
BE		31	-13	61	14	7	1	0	0	1	92	1	7	1
BG		55	-12	35	9	2	1	0	0	8	90	-3	2	1
CZ		41	-9	48	9	6	-1	1	-1	4	89	0	7	-2
DK		25	-9	54	8	11	0	2	1	8	79	-1	13	1
DE		41	-2	50	3	4	-2	1	0	4	91	1	5	-2
EE		27	-15	53	9	5	1	0	-1	15	80	-6	5	0
IE		48	-11	40	8	2	-1	0	0	10	88	-3	2	-1
EL		51	1	43	2	4	-1	0	-1	2	94	3	4	-2
ES		40	-15	51	15	2	-1	0	-1	7	91	0	2	-2
FR		34	-3	52	3	6	1	1	-1	7	86	0	7	0
HR		37	-12	51	12	9	2	2	0	1	88	0	11	2
IT		42	-4	49	7	3	-2	1	0	5	91	3	4	-2
CY		57	-3	37	4	2	-1	1	0	3	94	1	3	-1
LV		44	-6	46	9	3	-3	1	-1	6	90	3	4	-4
LT		36	-4	57	8	3	-3	0	0	4	93	4	3	-3
LU		38	-8	49	5	5	-1	0	0	8	87	-3	5	-1
HU		39	-11	48	7	7	1	1	0	5	87	-4	8	1
MT		37	-19	50	16	3	1	0	-1	10	87	-3	3	0
NL		25	-6	56	7	14	-1	1	-1	4	81	1	15	-2
AT		39	-7	49	8	8	-1	1	-1	3	88	1	9	-2
PL		28	-3	61	6	3	-5	1	-1	7	89	3	4	-6
PT		29	-18	65	19	1	-3	0	0	5	94	1	1	-3
RO		48	-9	36	7	10	4	3	2	3	84	-2	13	6
SI		49	-9	45	11	4	1	0	-1	2	94	2	4	0
SK		52	0	40	-3	2	0	1	1	5	92	-3	3	1
FI		46	-5	46	4	3	0	0	-1	5	92	-1	3	-1
SE		42	-6	48	8	6	-2	1	0	3	90	2	7	-2
UK		32	-18	48	11	4	-1	1	1	15	80	-7	5	0

QC7.3 How important do you think the following priorities of the Common Agricultural Policy (CAP) are?
Encouraging young people to enter the agricultural sector (%)






























		Very important		Fairly important		Not very important		Not at all important		Don't know	Total 'Important'		Total 'Not important'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		37	-7	47	7	9	0	2	0	5	84	0	11	0
BE		27	-12	57	14	14	0	1	-1	1	84	2	15	-1
BG		58	-15	32	11	3	1	1	0	6	90	-4	4	1
CZ		32	-11	48	10	14	3	2	-2	4	80	-1	16	1
DK		23	-4	49	3	17	-1	3	1	8	72	-1	20	0
DE		33	-1	49	2	12	0	1	-1	5	82	1	13	-1
EE		38	-13	47	9	6	2	1	0	8	85	-4	7	2
IE		50	-7	36	5	3	-1	1	0	10	86	-2	4	-1
EL		62	-1	33	2	3	0	1	0	1	95	1	4	0
ES		41	-13	49	14	4	-3	1	0	5	90	1	5	-3
FR		33	-5	48	3	11	2	3	0	5	81	-2	14	2
HR		42	-14	48	16	7	0	1	-1	2	90	2	8	-1
IT		43	-9	50	12	4	-1	0	-1	3	93	3	4	-2
CY		63	-6	32	7	3	0	0	-1	2	95	1	3	-1
LV		44	-5	41	6	7	-2	2	0	6	85	1	9	-2
LT		50	-7	42	7	5	0	1	1	2	92	0	6	1
LU		34	-12	45	5	9	0	2	0	10	79	-7	11	0
HU		46	-5	40	2	9	2	1	-1	4	86	-3	10	1
MT		40	-19	46	16	4	-2	1	0	9	86	-3	5	-2
NL		19	-6	46	3	30	6	2	-3	3	65	-3	32	3
AT		35	-4	47	4	13	1	3	0	2	82	0	16	1
PL		32	-3	57	8	4	-7	1	-1	6	89	5	5	-8
PT		36	-15	60	17	1	-2	0	-1	3	96	2	1	-3
RO		50	-14	34	11	10	5	4	2	2	84	-3	14	7
SI		48	-15	44	15	6	2	1	0	1	92	0	7	2
SK		51	-1	40	-2	3	0	1	0	5	91	-3	4	0
FI		35	-6	51	5	8	-1	1	0	5	86	-1	9	-1
SE		32	-9	49	10	15	1	2	-1	2	81	1	17	0
UK		34	-12	44	8	7	-2	1	0	14	78	-4	8	-2

QC8.1 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
(%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		20	-3	46	4	15	0	4	-2	15	66	1	19	-2
BE		15	-8	54	8	22	3	2	-3	7	69	0	24	0
BG		26	-4	43	1	12	1	4	0	15	69	-3	16	1
CZ		14	-8	48	10	22	1	5	-3	11	62	2	27	-2
DK		11	-3	44	1	19	0	2	-2	24	55	-2	21	-2
DE		22	-1	47	-1	17	0	3	-1	11	69	-2	20	-1
EE		15	-11	47	2	12	1	3	0	23	62	-9	15	1
IE		32	0	42	0	4	-3	0	-1	22	74	0	4	-4
EL		14	-3	43	4	25	1	8	-4	10	57	1	33	-3
ES		23	-2	46	12	9	-7	6	-4	16	69	10	15	-11
FR		7	-3	35	0	30	6	9	-2	19	42	-3	39	4
HR		17	-9	54	8	17	1	4	1	8	71	-1	21	2
IT		31	0	48	1	6	0	2	-2	13	79	1	8	-2
CY		25	-9	45	6	14	4	2	-4	14	70	-3	16	0
LV		16	-3	44	9	19	-4	7	-5	14	60	6	26	-9
LT		15	-4	55	1	14	1	2	0	14	70	-3	16	1
LU		8	-9	41	-5	24	3	6	2	21	49	-14	30	5
HU		25	-6	48	1	14	1	2	-1	11	73	-5	16	0
MT		22	-18	51	13	6	-1	1	0	20	73	-5	7	-1
NL		13	-12	52	8	21	5	3	-1	11	65	-4	24	4
AT		25	4	43	2	20	0	5	-4	7	68	6	25	-4
PL		19	-3	58	9	9	-5	2	-2	12	77	6	11	-7
PT		16	-8	47	2	18	0	1	-1	18	63	-6	19	-1
RO		27	-8	46	8	17	8	3	-1	7	73	0	20	7
SI		19	-6	45	8	19	-1	5	-3	12	64	2	24	-4
SK		23	3	46	-3	14	-4	4	-1	13	69	0	18	-5
FI		9	-7	52	2	21	3	3	-1	15	61	-5	24	2
SE		12	-1	43	8	22	-3	6	-3	17	55	7	28	-6
UK		18	-6	43	3	10	-1	2	0	27	61	-3	12	-1






























QC8.2 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?**Helping the smooth running of the EU Single Market (%)**

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		19	-1	48	3	12	-1	3	-1	18	67	2	15	-2
BE		12	-7	58	12	17	-3	1	-4	12	70	5	18	-7
BG		25	1	40	3	8	-3	4	1	23	65	4	12	-2
CZ		14	-4	45	6	22	-1	6	-2	13	59	2	28	-3
DK		15	-3	47	5	13	-1	3	-2	22	62	2	16	-3
DE		28	3	49	-1	9	-3	2	0	12	77	2	11	-3
EE		12	-9	52	7	9	-4	3	0	24	64	-2	12	-4
IE		27	-1	43	2	3	-3	1	-1	26	70	1	4	-4
EL		18	2	56	6	13	-4	3	-4	10	74	8	16	-8
ES		19	-1	49	12	6	-7	3	-2	23	68	11	9	-9
FR		7	-3	44	3	22	2	6	-3	21	51	0	28	-1
HR		13	-9	58	8	14	1	3	0	12	71	-1	17	1
IT		25	0	50	0	8	1	2	-1	15	75	0	10	0
CY		21	-12	51	11	9	2	1	-4	18	72	-1	10	-2
LV		14	3	38	1	19	-2	4	-6	25	52	4	23	-8
LT		14	-1	57	2	8	-3	1	-1	20	71	1	9	-4
LU		14	-4	45	-2	19	3	3	0	19	59	-6	22	3
HU		22	-6	53	5	13	0	2	-1	10	75	-1	15	-1
MT		16	-19	49	11	7	2	1	-2	27	65	-8	8	0
NL		15	-10	53	5	15	4	3	0	14	68	-5	18	4
AT		22	-1	52	5	12	-2	3	-1	11	74	4	15	-3
PL		22	0	56	7	8	-6	2	-1	12	78	7	10	-7
PT		15	-7	59	5	4	-5	1	-1	21	74	-2	5	-6
RO		24	-5	46	11	14	3	2	-2	14	70	6	16	1
SI		17	-4	48	10	15	-3	4	-2	16	65	6	19	-5
SK		18	3	50	-3	12	-6	3	-1	17	68	0	15	-7
FI		10	-7	57	5	11	-2	3	1	19	67	-2	14	-1
SE		13	-1	48	9	17	-3	4	-4	18	61	8	21	-7
UK		12	-3	40	0	12	0	4	0	32	52	-3	16	0






























QC8.3 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?**Improving trade relations between the EU and the rest of the world (%)**

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		19	-3	47	3	13	0	4	0	17	66	0	17	0
BE		17	-6	57	13	16	-5	2	-2	8	74	7	18	-7
BG		31	1	41	1	6	-1	2	-1	20	72	2	8	-2
CZ		16	-4	45	7	18	-1	6	-2	15	61	3	24	-3
DK		17	-3	47	9	12	-2	3	-4	21	64	6	15	-6
DE		26	2	47	1	15	-1	3	-1	9	73	3	18	-2
EE		14	-8	52	4	7	-3	2	-1	25	66	-4	9	-4
IE		30	-1	42	0	4	-2	0	-2	24	72	-1	4	-4
EL		19	2	55	4	13	-1	3	-4	10	74	6	16	-5
ES		22	-2	47	9	7	-3	2	-3	22	69	7	9	-6
FR		6	-4	40	2	24	5	7	-3	23	46	-2	31	2
HR		14	-9	57	9	14	0	3	-1	12	71	0	17	-1
IT		27	2	48	-4	7	1	2	0	16	75	-2	9	1
CY		23	-8	48	5	6	0	1	-3	22	71	-3	7	-3
LV		15	-2	51	5	12	-3	3	-3	19	66	3	15	-6
LT		15	-2	58	5	7	-2	1	-2	19	73	3	8	-4
LU		14	-3	42	-2	20	2	4	-2	20	56	-5	24	0
HU		24	-2	51	1	13	-1	2	0	10	75	-1	15	-1
MT		19	-16	53	15	4	-4	1	-2	23	72	-1	5	-6
NL		18	-13	53	9	14	3	4	1	11	71	-4	18	4
AT		23	2	48	5	14	-4	5	-1	10	71	7	19	-5
PL		20	-2	56	8	7	-6	2	-1	15	76	6	9	-7
PT		15	-6	61	6	3	-6	0	-1	21	76	0	3	-7
RO		25	-6	48	14	14	4	4	0	9	73	8	18	4
SI		14	-9	47	14	19	-2	4	-4	16	61	5	23	-6
SK		19	3	50	-1	10	-7	2	-2	19	69	2	12	-9
FI		10	-10	58	10	11	-2	3	0	18	68	0	14	-2
SE		15	3	40	1	19	1	7	-1	19	55	4	26	0
UK		15	-5	39	-2	13	2	4	1	29	54	-7	17	3

QC8.4 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?**Mitigating the impact of climate change (%)**






























		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		22	-1	40	3	17	0	6	-1	15	62	2	23	-1
BE		19	-5	47	9	24	3	4	-5	6	66	4	28	-2
BG		19	-1	37	9	15	-2	5	-2	24	56	8	20	-4
CZ		12	-6	45	11	23	-4	6	-1	14	57	5	29	-5
DK		15	0	32	4	26	-2	9	-4	18	47	4	35	-6
DE		37	2	32	-5	18	2	6	1	7	69	-3	24	3
EE		7	-3	40	10	17	1	6	-3	30	47	7	23	-2
IE		26	1	40	7	8	-7	2	-1	24	66	8	10	-8
EL		13	0	47	7	24	2	7	-6	9	60	7	31	-4
ES		24	2	40	9	11	-7	7	-2	18	64	11	18	-9
FR		10	-3	31	5	27	2	14	-1	18	41	2	41	1
HR		14	-7	51	9	21	2	4	-2	10	65	2	25	0
IT		32	2	44	0	7	0	2	-2	15	76	2	9	-2
CY		27	-2	41	3	14	2	3	-3	15	68	1	17	-1
LV		11	1	37	9	23	-4	8	-4	21	48	10	31	-8
LT		12	1	48	7	20	-2	3	-4	17	60	8	23	-6
LU		13	-12	37	-1	23	2	11	4	16	50	-13	34	6
HU		22	-6	46	2	19	3	3	-1	10	68	-4	22	2
MT		25	-14	46	9	7	1	2	1	20	71	-5	9	2
NL		30	-5	36	2	19	5	6	1	9	66	-3	25	6
AT		30	8	36	-4	20	-2	8	1	6	66	4	28	-1
PL		18	0	53	9	13	-3	3	-2	13	71	9	16	-5
PT		14	-2	44	-8	18	5	1	0	23	58	-10	19	5
RO		24	-3	44	9	16	4	5	-2	11	68	6	21	2
SI		17	-2	39	8	24	1	8	-4	12	56	6	32	-3
SK		20	4	45	-1	16	-4	3	-2	16	65	3	19	-6
FI		12	-3	50	4	20	1	3	-1	15	62	1	23	0
SE		16	1	41	6	22	-1	7	-5	14	57	7	29	-6
UK		14	-6	37	3	15	0	4	0	30	51	-3	19	0

QC8.5 Do you agree or not that the Common Agricultural Policy (CAP) contributes to...?**Extending coverage of broadband Internet and communication services in rural areas (%)**





























		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		22	2	40	6	13	-1	5	-3	20	62	8	18	-4
BE		16	0	44	6	20	0	4	-5	16	60	6	24	-5
BG		28	10	30	4	7	2	4	-1	31	58	14	11	1
CZ		17	2	46	13	14	-7	5	-4	18	63	15	19	-11
DK		15	3	21	4	17	0	11	-3	36	36	7	28	-3
DE		34	7	34	-1	13	-3	7	-1	12	68	6	20	-4
EE		11	-2	40	10	11	1	6	-4	32	51	8	17	-3
IE		29	2	34	5	9	-2	3	-6	25	63	7	12	-8
EL		21	8	45	10	11	-5	2	-8	21	66	18	13	-13
ES		17	-2	44	16	8	-2	5	-6	26	61	14	13	-8
FR		11	0	34	3	19	1	11	0	25	45	3	30	1
HR		23	2	45	6	16	1	5	0	11	68	8	21	1
IT		26	5	47	2	7	1	2	-2	18	73	7	9	-1
CY		26	2	44	10	6	-1	2	-2	22	70	12	8	-3
LV		19	1	41	5	13	-1	5	-3	22	60	6	18	-4
LT		19	6	48	9	10	-4	2	-4	21	67	15	12	-8
LU		14	-3	37	5	17	-1	5	-7	27	51	2	22	-8
HU		29	6	42	-1	14	0	4	-3	11	71	5	18	-3
MT		21	-5	44	15	6	-1	2	-1	27	65	10	8	-2
NL		17	-5	36	6	21	3	8	0	18	53	1	29	3
AT		24	8	39	1	17	-1	7	-2	13	63	9	24	-3
PL		23	3	55	6	6	-6	2	-2	14	78	9	8	-8
PT		13	-3	42	3	18	5	1	-2	26	55	0	19	3
RO		32	3	46	15	10	1	4	-2	8	78	18	14	-1
SI		24	5	44	14	14	-4	4	-7	14	68	19	18	-11
SK		26	13	46	4	9	-10	3	-4	16	72	17	12	-14
FI		11	-4	44	11	20	0	4	-1	21	55	7	24	-1
SE		19	4	37	13	14	-4	7	-4	23	56	17	21	-8
UK		17	-7	30	4	15	0	6	0	32	47	-3	21	0

QC9 The EU gives financial support to farmers to help stabilise their incomes. This aid represents around 1% of the combined public expenditure of the 28 Member States of the EU and almost 40% 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
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4
EU28		26	-3	45	4	11	-2	18
BE		29	-12	54	14	12	0	5
BG		22	-10	37	6	5	2	36
CZ		23	-3	48	-5	13	4	16
DK		11	-4	51	9	27	-4	11
DE		16	-4	46	4	18	-1	20
EE		31	-14	34	6	6	2	29
IE		20	-3	53	1	9	-1	18
EL		23	-11	53	8	8	2	16
ES		31	-7	45	10	6	-2	18
FR		46	4	30	-1	8	-5	16
HR		18	-13	64	13	5	1	13
IT		25	4	48	0	4	-3	23
CY		25	-20	55	15	7	3	13
LV		60	-6	27	5	2	-1	11
LT		28	-5	54	4	7	1	11
LU		37	2	34	0	9	-13	20
HU		19	-7	53	2	11	1	17
MT		30	-5	53	8	3	-1	14
NL		14	1	50	2	27	-4	9
AT		23	-7	51	10	14	0	12
PL		19	-5	58	9	4	-4	19
PT		24	-4	36	-4	9	-2	31
RO		38	-19	39	12	5	4	18
SI		22	-8	56	9	11	-1	11
SK		32	-3	47	2	5	2	16
FI		26	2	58	5	7	-8	9
SE		15	-7	48	13	28	-3	9
UK		22	-3	44	1	13	-3	21

QC10 What do you think are the main reasons why the EU spends a significant proportion of its budget (almost 40% 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 ensure sustainable farming		Agriculture requires heavy human and financial investments		Financial aid to farmers makes it possible to guarantee the food supply of Europeans		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
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4
EU28		14	-3	30	-3	28	-4	28	-12	24	1	20	N.A	2	0	4	1	13
BE		14	-3	32	1	34	-4	30	-13	34	-1	21	N.A	1	0	4	2	3
BG		17	-4	26	-3	43	-1	26	-5	20	4	14	N.A	1	0	5	2	14
CZ		12	-3	37	-6	29	1	32	-6	30	5	15	N.A	1	0	3	1	6
DK		17	-4	33	-4	21	1	37	-7	34	-4	18	N.A	2	-4	3	2	7
DE		15	-3	28	-8	17	-5	29	-8	27	1	25	N.A	1	-2	7	0	12
EE		9	-4	37	-2	32	-6	20	-7	23	-1	9	N.A	2	1	4	1	19
IE		21	-1	33	-7	25	2	35	-17	28	9	15	N.A	1	0	2	1	12
EL		19	-3	36	-9	36	-3	30	-14	24	9	21	N.A	4	-1	4	1	6
ES		15	-6	33	2	32	-6	32	-10	18	3	23	N.A	1	-3	2	0	11
FR		13	-2	28	-5	37	-2	23	-5	31	-7	22	N.A	1	-1	2	0	11
HR		16	-5	30	-11	30	-4	29	-17	20	8	17	N.A	1	0	3	2	12
IT		15	3	28	-1	34	-5	25	-8	17	-1	26	N.A	1	-1	6	2	13
CY		16	-4	43	-7	31	-10	25	-12	21	5	31	N.A	1	-1	1	0	8
LV		15	-1	42	5	28	-6	28	-3	20	-2	13	N.A	3	1	3	0	9
LT		21	-2	34	-2	42	1	27	-7	22	-1	11	N.A	2	0	3	2	8
LU		10	-6	34	-1	33	-7	27	-9	32	-1	17	N.A	4	2	3	-1	7
HU		16	0	29	-1	37	-3	28	-12	25	-1	22	N.A	1	0	3	-1	8
MT		16	3	31	-10	29	-11	28	-10	23	-2	23	N.A	1	-1	2	2	13
NL		16	1	35	-8	16	2	40	-9	36	-6	25	N.A	4	0	2	0	5
AT		20	1	34	-12	18	0	30	-12	32	1	26	N.A	3	-2	5	1	5
PL		14	-1	31	-5	31	-1	29	-16	21	2	20	N.A	2	1	3	0	11
PT		9	-7	31	-6	25	-13	37	-6	14	2	10	N.A	1	0	5	-1	22
RO		17	-4	30	-6	31	-5	30	-7	19	2	18	N.A	2	1	5	4	11
SI		12	-7	30	1	38	7	28	-1	22	0	12	N.A	3	-6	5	2	8
SK		17	0	31	-7	33	-8	27	-5	23	-5	15	N.A	2	0	3	2	11
FI		13	-4	42	-2	29	2	39	-11	28	-7	13	N.A	2	-1	3	2	8
SE		23	1	35	-7	18	-4	38	-1	34	-3	19	N.A	5	-1	2	0	4
UK		7	-11	28	6	17	-13	26	-27	19	7	10	N.A	3	2	4	1	30

QC11 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
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4
EU28		44	-1	12	-1	29	0	15
BE		39	-7	20	5	37	3	4
BG		40	-12	6	4	23	5	31
CZ		45	-4	16	5	27	-1	12
DK		17	-7	32	-4	42	11	9
DE		28	-3	16	-2	39	2	17
EE		59	-17	6	3	13	4	22
IE		43	-2	8	0	34	-2	15
EL		52	-12	7	2	31	7	10
ES		63	1	4	-1	21	0	12
FR		54	9	8	-5	26	-3	12
HR		48	-13	14	3	32	12	6
IT		47	6	7	-4	28	-3	18
CY		73	-1	4	0	14	-3	9
LV		84	0	3	0	8	-2	5
LT		50	-9	7	1	35	8	8
LU		46	4	9	-2	34	-5	11
HU		32	-10	13	-3	43	11	12
MT		68	-6	7	4	13	-1	12
NL		25	2	30	-4	36	0	9
AT		35	-3	18	2	38	5	9
PL		36	-1	15	-2	27	-2	22
PT		48	-3	8	-4	15	-4	29
RO		67	-17	16	14	11	4	6
SI		41	-8	9	-1	43	9	7
SK		58	-5	7	3	22	-1	13
FI		37	4	11	-5	44	-2	8
SE		31	-5	26	-3	34	8	9
UK		42	-6	13	0	27	1	18






























QC12.1 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.

Ensuring a fair standard of living for farmers (%)

		European level		National level		Regional or local level		Don't know
		EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	
EU28		44	-1	40	1	11	0	5
BE		56	-7	38	10	5	-1	1
BG		50	2	35	-1	7	-2	8
CZ		41	-6	48	3	10	3	1
DK		37	-9	50	4	7	2	6
DE		56	3	30	-4	10	2	4
EE		28	-1	54	-6	10	3	8
IE		48	7	39	-2	7	0	6
EL		53	-6	39	4	7	1	1
ES		63	16	24	-13	9	-2	4
FR		37	-12	45	8	14	4	4
HR		37	37	45	45	17	17	1
IT		46	-1	37	5	11	-5	6
CY		63	6	30	0	5	-3	2
LV		39	3	40	-3	16	-1	5
LT		44	2	44	5	8	-2	4
LU		53	-7	35	6	7	-1	5
HU		37	-5	52	3	8	1	3
MT		45	12	42	-12	8	2	5
NL		49	-12	43	10	6	2	2
AT		40	-3	40	0	17	2	3
PL		35	-3	48	2	12	1	5
PT		53	5	38	7	4	-11	5
RO		36	-1	47	5	15	3	2
SI		34	-2	45	-2	18	2	3
SK		39	-15	43	7	14	6	4
FI		28	0	57	-4	10	0	5
SE		29	-10	59	10	10	0	2
UK		28	2	49	0	13	-4	10






























QC12.2 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.

Ensuring reasonable food prices for consumers (%)

		European level		National level		Regional or local level		Don't know
		EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	
EU28		42	0	42	0	12	0	4
BE		57	-6	38	10	4	-2	1
BG		40	8	46	-7	7	-3	7
CZ		38	-3	51	1	10	2	1
DK		44	-2	46	-3	6	4	4
DE		53	1	33	-3	12	4	2
EE		19	0	64	-6	9	1	8
IE		48	9	39	-6	7	1	6
EL		41	-9	52	9	7	0	0
ES		58	12	27	-11	11	0	4
FR		36	-12	45	9	15	3	4
HR		34	34	48	48	17	17	1
IT		48	4	35	0	11	-5	6
CY		50	-5	43	4	6	3	1
LV		34	6	45	-3	15	-6	6
LT		40	11	50	-1	8	-4	2
LU		52	-18	33	10	8	4	7
HU		32	-1	55	-4	10	4	3
MT		35	8	49	-13	11	5	5
NL		51	-13	41	8	6	4	2
AT		40	1	43	-3	15	1	2
PL		33	2	53	-2	10	0	4
PT		48	0	44	11	5	-8	3
RO		33	4	51	3	14	0	2
SI		32	-4	47	-4	18	6	3
SK		34	-11	49	6	14	4	3
FI		27	-3	55	-4	13	3	5
SE		27	-6	58	6	11	-3	4
UK		26	3	50	-3	14	-3	10






























QC12.3 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.

Securing food supply (%)






























		European level		National level		Regional or local level		Don't know
		EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	
EU28		48	-5	37	4	11	2	4
BE		63	-6	32	8	4	-1	1
BG		40	-32	47	33	6	1	7
CZ		39	-3	50	3	11	1	0
DK		59	1	32	-5	5	3	4
DE		62	-13	25	8	11	6	2
EE		23	-37	61	30	10	6	6
IE		53	-7	34	10	7	3	6
EL		51	-8	42	9	6	-2	1
ES		62	13	24	-11	10	-1	4
FR		44	-7	37	4	14	2	5
HR		38	38	43	43	18	18	1
IT		51	-4	33	5	10	-2	6
CY		60	-21	33	18	5	5	2
LV		37	5	39	-6	17	-3	7
LT		44	8	47	7	7	-7	2
LU		60	-15	25	7	9	5	6
HU		37	-7	51	2	9	4	3
MT		51	-20	35	16	9	6	5
NL		73	-2	24	2	2	1	1
AT		40	1	41	-3	16	0	3
PL		33	-3	51	3	12	0	4
PT		54	2	39	11	3	-11	4
RO		30	-30	50	29	18	12	2
SI		36	-32	38	14	23	17	3
SK		36	-12	46	8	14	2	4
FI		31	-1	55	-3	10	1	4
SE		49	1	41	-1	8	-1	2
UK		30	0	49	-1	11	-2	10

QC12.4 For each of the following issues related to agriculture and rural development policy, please tell me if in your opinion, it should be dealt with at the European level, the national level, or the regional or local level.






























Ensuring that agricultural products are of good quality, healthy and safe (%)

		European level		National level		Regional or local level		Don't know
		EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	EB88.4	Diff. EB88.4 - EB72.5	
EU28		51	0	34	0	11	0	4
BE		61	-10	33	12	5	-1	1
BG		52	3	37	-3	5	-1	6
CZ		51	-8	40	8	9	1	0
DK		57	7	33	-13	6	4	4
DE		66	3	20	-5	12	3	2
EE		32	-1	51	-1	10	-1	7
IE		55	10	32	-4	7	-1	6
EL		53	-3	39	3	7	-1	1
ES		63	15	24	-11	9	-3	4
FR		49	-10	33	8	15	2	3
HR		38	38	44	44	17	17	1
IT		50	1	33	3	12	-4	5
CY		68	-5	26	4	5	3	1
LV		47	9	34	-7	14	-4	5
LT		53	11	40	0	5	-6	2
LU		65	-7	22	2	7	2	6
HU		41	-11	49	10	7	0	3
MT		52	6	36	-9	7	3	5
NL		75	-3	21	2	4	2	0
AT		41	-1	39	-2	17	1	3
PL		37	-4	49	4	11	1	3
PT		50	-1	41	12	5	-9	4
RO		34	-10	48	11	16	5	2
SI		43	0	35	-7	20	6	2
SK		42	-17	41	10	13	5	4
FI		43	7	42	-10	10	-2	5
SE		62	7	29	-3	7	-5	2
UK		34	4	46	-2	10	-6	10






























QC13.1 How important or not are the following factors in your decision to buy food products?
They come from a geographical area that you know (%)

		Very important	Fairly important	Not very important	Not at all important	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		31	44	17	6	0	2	75	23
BE		19	45	25	11	0	0	64	36
BG		41	38	12	4	1	4	79	16
CZ		28	46	18	7	0	1	74	25
DK		20	30	33	16	0	1	50	49
DE		33	44	17	5	0	1	77	22
EE		29	48	14	6	0	3	77	20
IE		39	42	11	5	0	3	81	16
EL		54	35	9	2	0	0	89	11
ES		30	49	13	7	0	1	79	20
FR		31	45	17	6	0	1	76	23
HR		30	40	20	8	0	2	70	28
IT		46	44	6	1	0	3	90	7
CY		60	26	9	4	0	1	86	13
LV		32	40	18	7	0	3	72	25
LT		21	43	24	10	0	2	64	34
LU		31	39	19	8	0	3	70	27
HU		37	43	14	5	0	1	80	19
MT		23	45	21	4	1	6	68	25
NL		9	26	43	20	0	2	35	63
AT		32	45	17	5	1	0	77	22
PL		22	55	12	5	0	6	77	17
PT		18	61	15	2	1	3	79	17
RO		30	37	21	8	1	3	67	29
SI		46	40	10	3	0	1	86	13
SK		32	45	11	4	1	7	77	15
FI		34	45	15	5	0	1	79	20
SE		36	40	16	8	0	0	76	24
UK		21	40	24	9	0	6	61	33

QC13.2 How important or not are the following factors in your decision to buy food products?**They respect local tradition and "know-how" (%)**

		Very important	Fairly important	Not very important	Not at all important	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		31	46	15	5	0	3	77	20
BE		22	54	18	6	0	0	76	24
BG		47	37	9	2	1	4	84	11
CZ		20	45	23	8	1	3	65	31
DK		20	34	31	13	0	2	54	44
DE		29	47	17	4	1	2	76	21
EE		20	51	17	6	0	6	71	23
IE		40	43	11	3	0	3	83	14
EL		54	36	8	2	0	0	90	10
ES		30	48	12	6	1	3	78	18
FR		34	48	12	4	0	2	82	16
HR		30	39	22	7	0	2	69	29
IT		45	45	5	2	1	2	90	7
CY		62	31	5	1	0	1	93	6
LV		29	40	18	8	0	5	69	26
LT		23	45	21	9	0	2	68	30
LU		35	42	14	5	0	4	77	19
HU		34	45	12	3	1	5	79	15
MT		27	46	17	4	1	5	73	21
NL		10	38	36	11	1	4	48	47
AT		32	47	16	4	1	0	79	20
PL		22	51	12	5	1	9	73	17
PT		20	64	11	2	0	3	84	13
RO		38	37	16	6	0	3	75	22
SI		46	42	9	2	0	1	88	11
SK		26	44	12	6	1	11	70	18
FI		23	49	20	6	0	2	72	26
SE		22	38	27	10	0	3	60	37
UK		28	43	17	4	1	7	71	21






























QC13.3 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 (%)**

		Very important	Fairly important	Not very important	Not at all important	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		33	43	15	6	0	3	76	21
BE		25	51	18	6	0	0	76	24
BG		51	32	8	3	1	5	83	11
CZ		21	42	26	10	0	1	63	36
DK		38	40	14	6	1	1	78	20
DE		28	39	23	7	1	2	67	30
EE		23	47	17	8	0	5	70	25
IE		49	38	8	2	0	3	87	10
EL		40	37	16	6	0	1	77	22
ES		32	47	12	7	0	2	79	19
FR		32	46	13	7	0	2	78	20
HR		26	43	22	7	0	2	69	29
IT		46	43	6	2	0	3	89	8
CY		73	21	3	2	0	1	94	5
LV		31	39	17	10	0	3	70	27
LT		26	40	22	10	0	2	66	32
LU		34	39	16	8	0	3	73	24
HU		37	37	17	8	0	1	74	25
MT		33	44	12	4	1	6	77	16
NL		23	48	22	6	0	1	71	28
AT		26	37	26	8	1	2	63	34
PL		21	54	14	3	1	7	75	17
PT		21	58	16	2	0	3	79	18
RO		40	34	14	9	0	3	74	23
SI		37	42	15	5	0	1	79	20
SK		28	41	13	8	1	9	69	21
FI		35	45	14	4	0	2	80	18
SE		43	46	9	2	0	0	89	11
UK		41	39	10	4	1	5	80	14

December 2017

Tables






























QC14 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(%)

		Organic farming		Fairtrade		Protected designation of origin		Protected geographical indication		Traditional specialty guaranteed		None (SPONTANEOUS)		Don't know	Aware of at least one logo	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2
EU28		27	4	37	0	18	-2	18	1	15	0	33	0	4	63	0
BE		39	9	68	5	9	-3	13	2	9	1	15	-11	2	83	9
BG		17	-4	3	-4	14	0	12	-2	12	-5	61	9	7	31	-9
CZ		23	0	26	5	25	-1	30	5	30	1	31	0	6	62	4
DK		46	10	74	6	5	-1	7	1	6	0	17	-5	2	81	4
DE		41	9	69	6	12	-3	12	3	8	1	18	-2	2	80	4
EE		36	-4	24	1	12	-1	15	-1	13	-2	36	5	11	52	-7
IE		24	-5	72	-7	9	-4	10	-6	9	-7	19	8	2	78	-8
EL		15	0	6	-3	31	2	22	3	27	2	50	5	1	48	0
ES		14	1	3	-1	16	-7	15	-4	13	-4	60	3	1	38	-3
FR		40	8	28	2	45	0	38	7	22	1	26	-1	2	72	3
HR		16	-1	10	-4	20	2	24	0	22	-1	49	9	6	45	-2
IT		16	0	7	-2	32	0	33	4	24	2	47	5	5	48	-4
CY		19	-2	10	0	7	-8	9	-7	21	-7	53	16	7	40	-4
LV		38	2	6	-2	6	0	9	-4	12	-4	45	0	7	49	-3
LT		47	-9	8	0	13	0	19	0	29	-14	31	10	7	62	-12
LU		58	25	84	3	22	-2	22	5	15	5	6	-4	1	94	6
HU		14	-4	9	-1	13	2	13	-1	10	-6	62	4	2	36	-5
MT		12	-5	33	2	5	-4	12	-2	10	-1	45	1	10	45	-5
NL		44	17	88	12	6	-2	6	-1	6	-1	8	-5	1	91	7
AT		33	-14	82	1	12	1	11	-2	9	-7	12	2	1	87	-1
PL		29	13	9	-2	12	-1	15	0	14	-3	45	-8	11	44	2
PT		11	-1	8	2	21	0	19	-2	25	2	54	0	7	39	-6
RO		9	-4	3	-2	5	-4	9	-5	16	-8	65	22	8	26	-10
SI		38	1	20	5	19	1	26	5	17	3	43	-1	3	54	-1
SK		27	0	18	-2	26	-1	22	-5	27	-3	37	-1	9	55	0
FI		44	9	54	-6	11	1	11	1	18	-2	25	4	1	73	-5
SE		54	13	86	2	8	-1	11	3	10	1	8	-1	1	91	1
UK		14	-3	78	-5	5	2	6	0	8	3	12	-1	5	82	-3

QC15.1 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?

Organic farming (%)






























ASK Q15.1 IF QC14=1

		Very important	Fairly important	Not very important	Not important at all	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		19	47	22	8	1	3	66	30
BE		19	58	16	6	1	0	77	22
BG		37	28	18	7	1	9	65	25
CZ		15	49	26	8	1	1	64	34
DK		22	44	23	9	1	1	66	32
DE		16	44	29	9	0	2	60	38
EE		8	40	31	14	1	6	48	45
IE		33	47	15	2	0	3	80	17
EL		20	40	31	1	2	6	60	32
ES		13	49	19	12	1	6	62	31
FR		18	53	14	10	1	4	71	24
HR		23	42	29	4	0	2	65	33
IT		42	48	9	0	0	1	90	9
CY		49	37	6	6	0	2	86	12
LV		18	41	31	8	0	2	59	39
LT		14	39	33	11	1	2	53	44
LU		26	40	26	6	0	2	66	32
HU		21	58	15	2	0	4	79	17
MT		25	45	15	7	0	8	70	22
NL		11	38	37	11	1	2	49	48
AT		20	42	27	8	2	1	62	35
PL		19	61	15	3	0	2	80	18
PT		13	60	22	4	0	1	73	26
RO		34	50	9	0	0	7	84	9
SI		32	42	18	5	0	3	74	23
SK		25	47	17	8	1	2	72	25
FI		14	50	29	5	0	2	64	34
SE		12	45	30	10	0	3	57	40
UK		13	36	27	10	1	13	49	37

QC15.2 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?

Protected designation of origin (%)






























ASK Q15.2 IF QC14=3

		Very important	Fairly important	Not very important	Not important at all	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		27	50	16	5	1	1	77	21
BE		22	49	23	6	0	0	71	29
BG		45	39	9	1	0	6	84	10
CZ		27	44	24	5	0	0	71	29
DK		15	23	48	10	0	4	38	58
DE		12	38	31	13	3	3	50	44
EE		5	49	31	12	1	2	54	43
IE		41	50	5	2	0	2	91	7
EL		34	48	13	4	0	1	82	17
ES		21	59	13	7	0	0	80	20
FR		22	57	15	5	0	1	79	20
HR		27	48	19	4	0	2	75	23
IT		48	47	4	1	0	0	95	5
CY		58	31	8	3	0	0	89	11
LV		18	32	29	20	0	1	50	49
LT		10	53	30	2	3	2	63	32
LU		26	52	15	6	0	1	78	21
HU		26	47	22	5	0	0	73	27
MT		27	46	14	3	0	10	73	17
NL		15	36	30	6	4	9	51	36
AT		21	52	15	8	3	1	73	23
PL		22	55	17	2	1	3	77	19
PT		19	61	18	2	0	0	80	20
RO		40	46	11	1	0	2	86	12
SI		42	39	13	4	1	1	81	17
SK		24	59	8	6	1	2	83	14
FI		20	52	25	2	0	1	72	27
SE		20	35	37	8	0	0	55	45
UK		26	40	32	2	0	0	66	34

QC15.3 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?

Protected geographical indication (%)






























ASK Q15.3 IF QC14=4

		Very important	Fairly important	Not very important	Not important at all	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		27	50	16	5	1	1	77	21
BE		22	50	21	7	0	0	72	28
BG		40	37	12	5	1	5	77	17
CZ		21	42	31	5	0	1	63	36
DK		15	29	44	9	2	1	44	53
DE		12	37	37	10	1	3	49	47
EE		8	43	31	13	0	5	51	44
IE		41	41	13	2	0	3	82	15
EL		31	50	15	3	0	1	81	18
ES		16	58	12	11	1	2	74	23
FR		22	57	15	6	0	0	79	21
HR		26	51	18	3	0	2	77	21
IT		51	45	3	0	0	1	96	3
CY		31	55	9	5	0	0	86	14
LV		12	40	36	10	0	2	52	46
LT		14	45	29	8	1	3	59	37
LU		17	51	20	11	0	1	68	31
HU		28	48	16	8	0	0	76	24
MT		32	49	6	10	0	3	81	16
NL		7	34	37	15	4	3	41	52
AT		17	54	21	7	1	0	71	28
PL		19	57	17	3	1	3	76	20
PT		18	67	13	1	0	1	85	14
RO		41	51	5	1	1	1	92	6
SI		32	46	16	4	0	2	78	20
SK		20	58	13	7	1	1	78	20
FI		15	55	25	4	0	1	70	29
SE		14	39	33	14	0	0	53	47
UK		12	48	26	7	1	6	60	33






























QC15.4 To what extent would the presence of the following logo(s) on the package of food products be an important reason to buy them?

Traditional specialty guaranteed (%)






























ASK Q15.4 IF QC14=5

		Very important	Fairly important	Not very important	Not important at all	You do not buy food products (SPONTANEOUS)	Don't know	Total 'Important'	Total 'Not important'
EU28		27	47	17	6	1	2	74	23
BE		17	57	18	7	0	1	74	25
BG		48	36	8	4	0	4	84	12
CZ		24	48	21	5	1	1	72	26
DK		12	25	41	22	0	0	37	63
DE		9	44	36	9	2	0	53	45
EE		5	51	25	11	0	8	56	36
IE		33	43	17	5	1	1	76	22
EL		31	50	17	2	0	0	81	19
ES		19	50	16	10	2	3	69	26
FR		20	50	20	9	1	0	70	29
HR		25	50	20	4	0	1	75	24
IT		51	43	3	1	1	1	94	4
CY		52	32	7	9	0	0	84	16
LV		15	28	38	17	0	2	43	55
LT		19	50	22	8	0	1	69	30
LU		23	48	22	7	0	0	71	29
HU		25	55	17	1	0	2	80	18
MT		20	38	22	7	0	13	58	29
NL		6	39	40	15	0	0	45	55
AT		19	59	18	3	1	0	78	21
PL		27	48	20	2	0	3	75	22
PT		16	70	13	0	0	1	86	13
RO		44	48	5	1	0	2	92	6
SI		40	41	14	4	0	1	81	18
SK		22	57	14	5	1	1	79	19
FI		21	50	19	8	0	2	71	27
SE		3	41	34	22	0	0	44	56
UK		19	30	26	18	1	6	49	44






























QC16.1 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They are safer than other food products (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		24	46	18	4	8	70	22
BE		14	50	29	4	3	64	33
BG		37	38	9	3	13	75	12
CZ		18	50	23	4	5	68	27
DK		23	44	20	7	6	67	27
DE		21	45	22	5	7	66	27
EE		15	50	19	3	13	65	22
IE		33	42	14	3	8	75	17
EL		33	48	13	2	4	81	15
ES		31	44	12	3	10	75	15
FR		13	45	27	8	7	58	35
HR		28	46	15	4	7	74	19
IT		31	49	10	3	7	80	13
CY		44	38	7	2	9	82	9
LV		28	45	13	4	10	73	17
LT		24	52	14	3	7	76	17
LU		15	42	25	9	9	57	34
HU		31	41	15	3	10	72	18
MT		26	53	6	2	13	79	8
NL		13	45	27	6	9	58	33
AT		35	43	15	3	4	78	18
PL		32	52	8	2	6	84	10
PT		23	61	6	1	9	84	7
RO		37	41	14	3	5	78	17
SI		30	44	19	3	4	74	22
SK		24	49	10	3	14	73	13
FI		15	56	20	4	5	71	24
SE		24	49	17	7	3	73	24
UK		13	44	25	5	13	57	30






























QC16.2 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They are of better quality than other food products (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		25	47	17	4	7	72	21
BE		15	50	27	5	3	65	32
BG		39	38	8	3	12	77	11
CZ		21	51	20	3	5	72	23
DK		22	43	22	8	5	65	30
DE		26	44	20	4	6	70	24
EE		15	48	21	4	12	63	25
IE		33	43	14	3	7	76	17
EL		37	46	12	2	3	83	14
ES		33	44	12	3	8	77	15
FR		13	49	23	7	8	62	30
HR		31	46	14	3	6	77	17
IT		30	50	10	2	8	80	12
CY		41	44	7	1	7	85	8
LV		28	48	12	3	9	76	15
LT		24	52	15	3	6	76	18
LU		17	47	21	8	7	64	29
HU		29	43	15	4	9	72	19
MT		24	54	5	3	14	78	8
NL		13	42	32	6	7	55	38
AT		39	43	13	3	2	82	16
PL		32	51	8	2	7	83	10
PT		23	62	6	1	8	85	7
RO		38	42	12	2	6	80	14
SI		33	46	15	3	3	79	18
SK		23	50	11	2	14	73	13
FI		16	50	24	4	6	66	28
SE		23	51	18	5	3	74	23
UK		13	45	26	5	11	58	31






























QC16.3 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They are more expensive than other food products (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		56	34	5	1	4	90	6
BE		45	47	6	1	1	92	7
BG		67	24	3	1	5	91	4
CZ		63	30	5	1	1	93	6
DK		51	39	7	1	2	90	8
DE		63	30	5	0	2	93	5
EE		60	32	2	0	6	92	2
IE		58	35	4	1	2	93	5
EL		69	28	2	0	1	97	2
ES		63	28	2	1	6	91	3
FR		57	33	6	1	3	90	7
HR		54	34	8	2	2	88	10
IT		45	41	7	1	6	86	8
CY		75	19	2	1	3	94	3
LV		59	29	4	1	7	88	5
LT		63	29	4	1	3	92	5
LU		64	29	1	1	5	93	2
HU		54	31	7	2	6	85	9
MT		41	39	5	1	14	80	6
NL		56	41	2	0	1	97	2
AT		50	39	8	2	1	89	10
PL		54	39	3	1	3	93	4
PT		42	50	2	1	5	92	3
RO		48	34	12	2	4	82	14
SI		61	29	6	2	2	90	8
SK		51	36	4	0	9	87	4
FI		55	38	4	1	2	93	5
SE		60	36	2	1	1	96	3
UK		53	36	5	1	5	89	6






























QC16.4 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They taste better than other food products (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		21	40	23	6	10	61	29
BE		12	44	32	8	4	56	40
BG		36	34	10	3	17	70	13
CZ		17	41	33	4	5	58	37
DK		19	36	28	11	6	55	39
DE		21	36	28	8	7	57	36
EE		12	33	28	6	21	45	34
IE		32	37	19	3	9	69	22
EL		29	40	22	4	5	69	26
ES		28	39	13	4	16	67	17
FR		12	36	31	9	12	48	40
HR		28	37	22	4	9	65	26
IT		28	47	14	3	8	75	17
CY		34	32	17	3	14	66	20
LV		23	38	18	6	15	61	24
LT		19	41	25	5	10	60	30
LU		18	36	25	10	11	54	35
HU		24	36	21	6	13	60	27
MT		19	41	14	4	22	60	18
NL		15	39	30	6	10	54	36
AT		28	43	20	5	4	71	25
PL		28	46	13	3	10	74	16
PT		22	58	7	1	12	80	8
RO		35	46	11	3	5	81	14
SI		33	37	22	4	4	70	26
SK		23	41	16	3	17	64	19
FI		13	40	30	6	11	53	36
SE		19	40	24	11	6	59	35
UK		11	34	33	8	14	45	41






























QC16.5 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They are produced using better environmental practices than other food products (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		27	51	11	2	9	78	13
BE		20	60	14	2	4	80	16
BG		38	39	6	2	15	77	8
CZ		17	55	18	3	7	72	21
DK		47	39	7	2	5	86	9
DE		28	51	11	2	8	79	13
EE		16	51	14	3	16	67	17
IE		36	48	6	1	9	84	7
EL		29	51	11	1	8	80	12
ES		32	43	8	3	14	75	11
FR		22	50	15	4	9	72	19
HR		27	51	13	2	7	78	15
IT		31	50	8	3	8	81	11
CY		42	41	4	0	13	83	4
LV		23	46	11	2	18	69	13
LT		22	49	13	3	13	71	16
LU		23	48	13	5	11	71	18
HU		30	45	11	4	10	75	15
MT		22	54	6	2	16	76	8
NL		29	52	10	2	7	81	12
AT		35	48	11	2	4	83	13
PL		31	53	7	2	7	84	9
PT		20	64	4	1	11	84	5
RO		33	46	11	2	8	79	13
SI		26	51	14	3	6	77	17
SK		20	52	9	1	18	72	10
FI		26	55	11	2	6	81	13
SE		43	45	8	2	2	88	10
UK		18	55	13	2	12	73	15






























QC16.6 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They are produced with a very restricted use of pesticides, fertilisers or antibiotics (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		32	47	9	3	9	79	12
BE		24	58	12	2	4	82	14
BG		35	37	8	3	17	72	11
CZ		22	53	15	3	7	75	18
DK		54	36	5	1	4	90	6
DE		33	46	10	4	7	79	14
EE		18	49	12	3	18	67	15
IE		41	46	5	1	7	87	6
EL		31	51	11	1	6	82	12
ES		33	43	7	3	14	76	10
FR		28	49	11	4	8	77	15
HR		27	49	13	3	8	76	16
IT		34	48	8	3	7	82	11
CY		43	39	4	0	14	82	4
LV		23	43	13	5	16	66	18
LT		22	47	15	3	13	69	18
LU		24	49	7	6	14	73	13
HU		34	46	10	2	8	80	12
MT		26	51	6	2	15	77	8
NL		37	48	6	1	8	85	7
AT		38	47	9	2	4	85	11
PL		33	51	7	2	7	84	9
PT		22	61	4	1	12	83	5
RO		35	40	14	3	8	75	17
SI		27	47	16	3	7	74	19
SK		22	51	9	1	17	73	10
FI		42	44	6	2	6	86	8
SE		68	27	2	1	2	95	3
UK		28	50	8	1	13	78	9

QC16.7 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They respect higher animal welfare standards than other food products (%)






























		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		28	48	11	2	11	76	13
BE		19	57	17	2	5	76	19
BG		33	35	6	2	24	68	8
CZ		18	54	16	3	9	72	19
DK		46	35	10	3	6	81	13
DE		32	49	10	2	7	81	12
EE		16	50	12	2	20	66	14
IE		36	45	6	2	11	81	8
EL		27	48	11	1	13	75	12
ES		32	41	7	2	18	73	9
FR		18	50	14	5	13	68	19
HR		27	47	14	3	9	74	17
IT		30	47	10	3	10	77	13
CY		36	37	7	1	19	73	8
LV		22	41	11	4	22	63	15
LT		19	44	18	3	16	63	21
LU		24	45	13	5	13	69	18
HU		28	45	12	3	12	73	15
MT		20	53	7	2	18	73	9
NL		36	50	7	2	5	86	9
AT		40	44	9	3	4	84	12
PL		30	52	8	2	8	82	10
PT		18	63	4	1	14	81	5
RO		31	44	14	3	8	75	17
SI		28	48	14	3	7	76	17
SK		24	53	7	1	15	77	8
FI		33	50	8	2	7	83	10
SE		42	44	9	2	3	86	11
UK		19	51	13	2	15	70	15

QC16.8 Do you agree or not with the following statements about food products coming from 'organic' agriculture?
They are difficult to find in the supermarkets, shops or markets in the area where you live (%)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'	Total 'Disagree'
EU28		13	27	31	23	6	40	54
BE		7	27	42	21	3	34	63
BG		28	29	19	10	14	57	29
CZ		15	36	36	9	4	51	45
DK		3	10	30	54	3	13	84
DE		8	16	33	40	3	24	73
EE		7	26	37	17	13	33	54
IE		22	32	27	15	4	54	42
EL		12	30	35	20	3	42	55
ES		27	41	14	9	9	68	23
FR		3	15	40	37	5	18	77
HR		19	41	28	5	7	60	33
IT		18	37	25	13	7	55	38
CY		20	35	26	13	6	55	39
LV		19	29	29	12	11	48	41
LT		12	30	27	21	10	42	48
LU		6	14	35	39	6	20	74
HU		28	37	18	8	9	65	26
MT		17	39	20	6	18	56	26
NL		4	14	45	34	3	18	79
AT		18	29	31	20	2	47	51
PL		15	44	25	8	8	59	33
PT		12	49	26	7	6	61	33
RO		32	38	18	5	7	70	23
SI		16	28	32	20	4	44	52
SK		19	36	18	12	15	55	30
FI		5	22	40	29	4	27	69
SE		3	16	27	53	1	19	80
UK		6	21	43	22	8	27	65






























QC17.1 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?

Food safety standards (%)

		Totally justified		Somewhat justified		Somewhat unjustified		Totally unjustified		Don't know	Total 'Justified'		Total 'Unjustified'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		55	-1	35	4	4	-1	1	-1	5	90	3	5	-2
BE		50	-9	44	12	4	-2	1	0	1	94	3	5	-2
BG		64	-6	23	3	3	1	1	0	9	87	-3	4	1
CZ		59	-3	31	3	5	1	1	-1	4	90	0	6	0
DK		73	-1	21	2	2	-1	1	0	3	94	1	3	-1
DE		60	2	32	1	3	-2	1	-1	4	92	3	4	-3
EE		54	2	28	-3	4	-1	1	-2	13	82	-1	5	-3
IE		60	-6	31	6	3	0	0	-2	6	91	0	3	-2
EL		79	6	17	-3	2	-1	1	0	1	96	3	3	-1
ES		57	3	36	11	3	-4	1	-2	3	93	14	4	-6
FR		56	-1	36	4	3	-1	1	-1	4	92	3	4	-2
HR		52	-7	33	7	9	0	2	0	4	85	0	11	0
IT		40	-4	41	5	8	3	2	-3	9	81	1	10	0
CY		79	-1	14	1	3	-1	2	1	2	93	0	5	0
LV		48	0	36	3	5	-5	2	0	9	84	3	7	-5
LT		52	-6	36	6	2	-2	1	-1	9	88	0	3	-3
LU		58	-15	31	11	3	0	2	1	6	89	-4	5	1
HU		55	-2	37	0	4	1	1	0	3	92	-2	5	1
MT		39	-28	48	26	4	0	2	1	7	87	-2	6	1
NL		77	-5	19	5	2	1	2	1	0	96	0	4	2
AT		62	-2	32	5	4	1	1	-2	1	94	3	5	-1
PL		41	-7	49	8	3	-3	1	0	6	90	1	4	-3
PT		49	1	46	3	1	-1	0	-1	4	95	4	1	-2
RO		44	-8	35	8	12	6	3	1	6	79	0	15	7
SI		64	-3	30	8	4	-1	0	-3	2	94	5	4	-4
SK		51	2	40	-1	2	0	1	1	6	91	1	3	1
FI		62	-5	31	3	4	2	1	0	2	93	-2	5	2
SE		82	0	14	1	1	0	2	0	1	96	1	3	0
UK		53	1	31	-3	4	-1	1	-1	11	84	-2	5	-2






























QC17.2 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?

Animal welfare standards (%)






























		Totally justified		Somewhat justified		Somewhat unjustified		Totally unjustified		Don't know	Total 'Justified'		Total 'Unjustified'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		54	-4	34	5	5	0	1	-1	6	88	1	6	-1
BE		48	-8	43	12	7	-3	1	0	1	91	4	8	-3
BG		52	-1	30	3	6	0	2	0	10	82	2	8	0
CZ		57	-7	34	8	5	1	1	-2	3	91	1	6	-1
DK		74	-5	20	6	2	0	1	0	3	94	1	3	0
DE		65	1	27	0	3	-1	1	-1	4	92	1	4	-2
EE		46	-3	34	2	5	0	1	-3	14	80	-1	6	-3
IE		57	-7	33	8	4	0	0	-2	6	90	1	4	-2
EL		75	5	20	-3	3	0	1	0	1	95	2	4	0
ES		52	-3	39	13	4	-1	1	-2	4	91	10	5	-3
FR		56	-4	35	6	4	-1	1	0	4	91	2	5	-1
HR		46	-9	36	3	11	5	3	1	4	82	-6	14	6
IT		40	-5	39	6	10	2	2	-2	9	79	1	12	0
CY		78	2	16	-1	3	-1	1	0	2	94	1	4	-1
LV		43	-3	38	4	8	-2	2	0	9	81	1	10	-2
LT		45	-4	41	7	4	-4	1	-1	9	86	3	5	-5
LU		58	-15	31	10	4	2	2	0	5	89	-5	6	2
HU		44	-8	42	5	9	3	1	-1	4	86	-3	10	2
MT		38	-25	48	22	4	0	3	1	7	86	-3	7	1
NL		71	-6	24	6	3	1	2	1	0	95	0	5	2
AT		62	-4	32	9	4	-1	1	-2	1	94	5	5	-3
PL		40	-12	49	11	4	-1	1	0	6	89	-1	5	-1
PT		46	-5	48	10	1	-3	0	-1	5	94	5	1	-4
RO		39	-9	39	13	12	3	4	1	6	78	4	16	4
SI		62	-4	32	10	4	-2	0	-3	2	94	6	4	-5
SK		47	2	41	-1	4	0	1	1	7	88	1	5	1
FI		60	-9	35	9	2	0	1	0	2	95	0	3	0
SE		84	-4	13	6	1	0	1	-1	1	97	2	2	-1
UK		54	-7	30	3	4	1	1	-1	11	84	-4	5	0

QC17.3 Under the rules of the Common Agricultural Policy (CAP), subsidy payments to farmers are linked to the requirement to comply with rules for the environment, food safety and animal welfare. To what extent do you think that it is justified or unjustified to reduce subsidy payments to farmers who do not respect...?

Environmental standards (%)






























		Totally justified		Somewhat justified		Somewhat unjustified		Totally unjustified		Don't know	Total 'Justified'		Total 'Unjustified'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		52	-5	36	6	5	0	1	-1	6	88	1	6	-1
BE		44	-12	50	17	4	-3	1	-1	1	94	5	5	-4
BG		59	-9	28	7	3	1	1	0	9	87	-2	4	1
CZ		53	-7	35	6	7	2	1	-1	4	88	-1	8	1
DK		70	-5	22	4	3	0	2	1	3	92	-1	5	1
DE		60	-3	31	2	4	0	1	-1	4	91	-1	5	-1
EE		48	-1	33	0	5	0	1	-1	13	81	-1	6	-1
IE		56	-6	33	6	4	0	0	-2	7	89	0	4	-2
EL		72	5	23	-4	3	1	1	0	1	95	1	4	1
ES		53	-1	38	12	4	-2	1	-2	4	91	11	5	-4
FR		53	-5	37	5	5	2	1	-1	4	90	0	6	1
HR		47	-8	36	6	11	3	2	-1	4	83	-2	13	2
IT		40	-5	40	7	9	2	2	-2	9	80	2	11	0
CY		79	2	14	0	4	-2	1	0	2	93	2	5	-2
LV		44	-6	40	5	6	0	1	-1	9	84	-1	7	-1
LT		48	-9	39	8	3	-2	1	0	9	87	-1	4	-2
LU		56	-16	32	10	4	2	2	1	6	88	-6	6	3
HU		53	-6	38	3	5	2	1	0	3	91	-3	6	2
MT		37	-29	49	26	5	1	2	0	7	86	-3	7	1
NL		68	-7	26	7	4	1	1	0	1	94	0	5	1
AT		60	-2	33	9	5	-3	1	-2	1	93	7	6	-5
PL		42	-4	47	5	3	-4	1	0	7	89	1	4	-4
PT		45	-3	49	8	2	-2	0	-1	4	94	5	2	-3
RO		38	-11	35	7	16	9	5	3	6	73	-4	21	12
SI		60	-6	33	11	5	-1	0	-3	2	93	5	5	-4
SK		49	2	41	0	3	0	1	0	6	90	2	4	0
FI		53	-11	39	8	4	2	2	1	2	92	-3	6	3
SE		75	-6	20	7	2	0	2	0	1	95	1	4	0
UK		48	-8	34	3	5	1	1	-1	12	82	-5	6	0

QC18 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	Total 'In favour'		Total 'Opposed'	
		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2		EB88.4	Diff. EB88.4 - EB84.2	EB88.4	Diff. EB88.4 - EB84.2
EU28		43	-1	45	2	4	-1	1	0	7	88	1	5	-1
BE		39	-12	55	15	6	0	0	-1	0	94	3	6	-1
BG		53	-3	35	3	2	0	1	0	9	88	0	3	0
CZ		30	-9	56	6	7	3	2	1	5	86	-3	9	4
DK		69	10	24	-7	3	-2	1	-1	3	93	3	4	-3
DE		47	12	41	-5	3	-5	1	-1	8	88	7	4	-6
EE		36	-6	49	2	3	0	0	-1	12	85	-4	3	-1
IE		50	-3	40	5	4	0	0	-1	6	90	2	4	-1
EL		62	15	33	-7	3	-1	1	-2	1	95	8	4	-3
ES		50	-4	45	9	2	-1	0	-1	3	95	5	2	-2
FR		44	-4	46	6	4	0	1	0	5	90	2	5	0
HR		42	-11	46	9	5	0	2	1	5	88	-2	7	1
IT		32	0	56	-2	4	1	0	-1	8	88	-2	4	0
CY		83	11	14	-7	1	-2	0	-1	2	97	4	1	-3
LV		57	-2	33	2	2	-1	1	0	7	90	0	3	-1
LT		33	-10	59	11	3	0	1	0	4	92	1	4	0
LU		45	-9	49	11	2	-1	1	0	3	94	2	3	-1
HU		30	-14	56	9	10	5	0	-2	4	86	-5	10	3
MT		50	-13	45	14	2	1	0	0	3	95	1	2	1
NL		57	-5	35	5	5	1	2	0	1	92	0	7	1
AT		35	-1	51	4	8	-2	2	0	4	86	3	10	-2
PL		29	-1	57	3	3	-2	1	-1	10	86	2	4	-3
PT		43	3	50	0	1	-6	1	1	5	93	3	2	-5
RO		52	-13	30	5	11	8	2	2	5	82	-8	13	10
SI		51	3	41	4	4	-4	1	-1	3	92	7	5	-5
SK		38	4	49	-4	4	-2	1	1	8	87	0	5	-1
FI		59	10	34	-7	3	-1	1	-1	3	93	3	4	-2
SE		83	6	14	-5	2	-1	1	1	0	97	1	3	0
UK		39	-7	42	4	5	0	2	0	12	81	-3	7	0






























QC19.1 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

The EU should have no trade barriers to imports of agricultural products, regardless of their origin
(%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2
EU28		13	-1	26	3	27	-2	23	0	11	39	2	50	-2
BE		10	-3	34	7	32	-2	21	-3	3	44	4	53	-5
BG		11	1	15	-1	21	-4	33	6	20	26	0	54	2
CZ		9	1	26	4	31	1	24	-8	10	35	5	55	-7
DK		16	-16	24	3	26	2	25	7	9	40	-13	51	9
DE		16	-1	22	4	29	-3	27	-1	6	38	3	56	-4
EE		10	-12	27	2	28	1	11	-3	24	37	-10	39	-2
IE		18	10	22	4	19	-2	28	0	13	40	14	47	-2
EL		7	-9	18	4	32	1	36	-1	7	25	-5	68	0
ES		18	7	28	-1	26	0	13	0	15	46	6	39	0
FR		7	-5	19	3	30	-1	35	2	9	26	-2	65	1
HR		6	6	23	23	31	31	30	30	10	29	29	61	61
IT		15	-2	31	2	20	-3	24	7	10	46	0	44	4
CY		14	-1	20	7	24	4	36	-5	6	34	6	60	-1
LV		18	4	26	2	27	-1	15	-5	14	44	6	42	-6
LT		11	2	27	6	26	-5	19	-6	17	38	8	45	-11
LU		14	-3	24	0	25	0	21	-3	16	38	-3	46	-3
HU		11	-2	24	9	27	-1	32	-8	6	35	7	59	-9
MT		13	-3	34	11	24	-1	14	-5	15	47	8	38	-6
NL		10	-6	27	2	38	5	19	-1	6	37	-4	57	4
AT		14	4	25	-1	25	-6	26	2	10	39	3	51	-4
PL		13	3	34	10	25	-6	13	-9	15	47	13	38	-15
PT		9	-6	27	-12	39	18	9	-1	16	36	-18	48	17
RO		17	-15	32	8	19	1	22	14	10	49	-7	41	15
SI		9	-1	20	4	28	1	36	-5	7	29	3	64	-4
SK		9	-3	22	-6	25	-9	29	9	15	31	-9	54	0
FI		7	-1	23	4	37	0	25	-8	8	30	3	62	-8
SE		12	-4	20	-7	29	2	35	10	4	32	-11	64	12
UK		16	3	31	11	24	-6	11	-10	18	47	14	35	-16






























QC19.2 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

The EU should have trade barriers to imports of agricultural products with the exception of imports from developing countries (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2		EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2
EU28		16	-2	36	4	24	0	10	-2	14	52	2	34	-2
BE		12	-3	47	5	28	4	9	-7	4	59	2	37	-3
BG		13	1	21	1	23	-1	13	-4	30	34	2	36	-5
CZ		11	-4	31	-2	30	4	16	4	12	42	-6	46	8
DK		10	-10	30	1	29	6	17	-3	14	40	-9	46	3
DE		15	-7	35	8	28	0	12	-3	10	50	1	40	-3
EE		5	-11	26	-6	29	2	11	1	29	31	-17	40	3
IE		31	17	33	1	14	-1	7	-4	15	64	18	21	-5
EL		20	-7	40	7	21	-4	10	-3	9	60	0	31	-7
ES		18	6	31	-2	21	-2	11	2	19	49	4	32	0
FR		13	-6	37	1	26	3	11	-2	13	50	-5	37	1
HR		17	17	39	39	22	22	9	9	13	56	56	31	31
IT		22	6	37	5	19	-3	10	-3	12	59	11	29	-6
CY		38	13	33	8	14	-9	7	-8	8	71	21	21	-17
LV		16	-2	37	3	21	0	8	-2	18	53	1	29	-2
LT		14	-4	43	6	17	-2	7	0	19	57	2	24	-2
LU		11	-8	34	4	24	0	14	0	17	45	-4	38	0
HU		22	-10	43	10	19	2	9	0	7	65	0	28	2
MT		20	1	45	13	13	-5	6	-1	16	65	14	19	-6
NL		6	-10	29	-5	41	12	16	0	8	35	-15	57	12
AT		22	2	38	-3	19	0	10	2	11	60	-1	29	2
PL		16	0	43	9	15	-11	4	-2	22	59	9	19	-13
PT		11	-7	36	-5	32	14	3	-3	18	47	-12	35	11
RO		21	6	39	14	19	-5	11	-1	10	60	20	30	-6
SI		18	-1	34	2	22	-3	15	-1	11	52	1	37	-4
SK		25	13	37	2	15	-17	4	-8	19	62	15	19	-25
FI		12	0	38	-1	28	-2	12	-3	10	50	-1	40	-5
SE		9	-3	34	-2	27	3	23	3	7	43	-5	50	6
UK		12	-4	33	-2	26	5	8	-1	21	45	-6	34	4






























QC19.3 I am going to read you some statements about the European Union and trade barriers to imports of agricultural products. Do you agree or disagree with each of the following statements?

Agricultural imports from any origin should only enter the EU if they fully comply with EU standards in terms of safety and quality (%)

		Totally agree		Tend to agree		Tend to disagree		Totally disagree		Don't know	Total 'Agree'		Total 'Disagree'	
		EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	EB88.4	Diff. EB88.4 - EB68.2	EB88.4	Diff. EB88.4 - EB68.2
EU28		54	-7	33	8	5	1	1	0	7	87	1	6	1
BE		50	-18	41	15	6	2	1	0	2	91	-3	7	2
BG		66	8	18	-4	4	1	2	0	10	84	4	6	1
CZ		55	-12	31	7	8	4	1	1	5	86	-5	9	5
DK		54	-17	31	13	6	2	3	1	6	85	-4	9	3
DE		67	-9	25	9	3	0	1	-1	4	92	0	4	-1
EE		38	-22	36	11	5	1	1	0	20	74	-11	6	1
IE		62	7	27	7	2	1	0	-1	9	89	14	2	0
EL		62	-7	33	6	3	0	0	-1	2	95	-1	3	-1
ES		60	16	31	-2	3	-2	0	-1	6	91	14	3	-3
FR		52	-17	34	11	4	1	2	1	8	86	-6	6	2
HR		38	38	40	40	12	12	3	3	7	78	78	15	15
IT		51	4	36	3	4	-2	2	0	7	87	7	6	-2
CY		75	-10	17	8	1	0	1	1	6	92	-2	2	1
LV		55	6	31	0	4	-2	1	-1	9	86	6	5	-3
LT		54	-2	33	5	2	-3	0	-1	11	87	3	2	-4
LU		49	-14	33	9	5	2	2	1	11	82	-5	7	3
HU		59	-19	31	14	6	4	1	0	3	90	-5	7	4
MT		42	-15	40	13	3	-1	2	1	13	82	-2	5	0
NL		65	-6	29	7	3	0	1	0	2	94	1	4	0
AT		52	-5	33	0	8	3	1	0	6	85	-5	9	3
PL		36	-18	46	12	5	1	1	1	12	82	-6	6	2
PT		36	-3	49	6	4	-1	0	-1	11	85	3	4	-2
RO		45	-15	33	15	11	7	4	2	7	78	0	15	9
SI		48	-20	34	14	7	4	5	1	6	82	-6	12	5
SK		52	-8	30	1	6	1	0	-1	12	82	-7	6	0
FI		54	-7	35	4	4	0	1	-1	6	89	-3	5	-1
SE		66	-8	26	9	5	1	2	0	1	92	1	7	1
UK		49	-11	32	9	3	0	1	0	15	81	-2	4	0






























QC20.1 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 (%)

		Very positive	Fairly positive	Fairly negative	Very negative	Don't know	Total 'Positive'	Total 'Negative'
EU28		11	48	15	3	23	59	18
BE		7	56	25	3	9	63	28
BG		24	37	5	1	33	61	6
CZ		13	47	16	5	19	60	21
DK		11	42	10	1	36	53	11
DE		9	45	23	3	20	54	26
EE		7	45	6	1	41	52	7
IE		34	49	3	0	14	83	3
EL		14	47	17	6	16	61	23
ES		17	51	8	2	22	68	10
FR		4	32	28	8	28	36	36
HR		14	53	14	6	13	67	20
IT		12	53	10	4	21	65	14
CY		21	48	11	4	16	69	15
LV		9	44	18	3	26	53	21
LT		11	47	6	1	35	58	7
LU		11	36	21	9	23	47	30
HU		14	58	15	1	12	72	16
MT		13	56	5	0	26	69	5
NL		6	48	19	3	24	54	22
AT		14	43	23	9	11	57	32
PL		12	60	8	2	18	72	10
PT		6	62	8	0	24	68	8
RO		26	49	13	4	8	75	17
SI		10	41	24	8	17	51	32
SK		12	48	14	2	24	60	16
FI		7	50	11	1	31	57	12
SE		11	41	15	2	31	52	17
UK		9	47	9	1	34	56	10






























QC20.2 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 (%)

		Very positive	Fairly positive	Fairly negative	Very negative	Don't know	Total 'Positive'	Total 'Negative'
EU28		12	52	12	3	21	64	15
BE		9	66	14	2	9	75	16
BG		21	41	6	2	30	62	8
CZ		10	51	16	5	18	61	21
DK		12	47	7	1	33	59	8
DE		12	54	14	3	17	66	17
EE		8	48	5	1	38	56	6
IE		35	49	3	0	13	84	3
EL		12	51	17	5	15	63	22
ES		16	53	7	2	22	69	9
FR		3	36	26	7	28	39	33
HR		11	52	17	6	14	63	23
IT		13	56	9	3	19	69	12
CY		22	57	6	2	13	79	8
LV		10	52	11	2	25	62	13
LT		11	49	5	1	34	60	6
LU		13	39	18	7	23	52	25
HU		16	60	12	2	10	76	14
MT		16	59	2	0	23	75	2
NL		8	58	10	2	22	66	12
AT		14	46	18	10	12	60	28
PL		12	62	7	1	18	74	8
PT		7	68	3	0	22	75	3
RO		25	49	16	3	7	74	19
SI		11	43	21	7	18	54	28
SK		13	47	15	1	24	60	16
FI		9	55	7	1	28	64	8
SE		15	44	10	1	30	59	11
UK		10	54	6	1	29	64	7






























QC21.1 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

Economic growth and jobs (%)

		Improved	Got worse	Stayed about the same	Don't know
EU28		27	43	22	8
BE		23	49	24	4
BG		20	44	30	6
CZ		38	30	27	5
DK		35	27	26	12
DE		31	31	29	9
EE		19	51	16	14
IE		56	19	18	7
EL		13	65	19	3
ES		25	50	19	6
FR		7	72	14	7
HR		11	63	25	1
IT		18	52	23	7
CY		29	43	24	4
LV		19	52	20	9
LT		25	39	28	8
LU		28	34	16	22
HU		45	26	25	4
MT		73	9	8	10
NL		26	43	21	10
AT		31	37	28	4
PL		64	14	16	6
PT		37	33	23	7
RO		25	44	28	3
SI		40	28	27	5
SK		35	34	21	10
FI		16	58	18	8
SE		21	52	20	7
UK		25	34	23	18






























QC21.2 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

The environment and landscape (%)

		Improved	Got worse	Stayed about the same	Don't know
EU28		30	36	28	6
BE		29	47	22	2
BG		16	39	31	14
CZ		42	24	32	2
DK		45	19	28	8
DE		30	30	35	5
EE		33	29	24	14
IE		56	17	20	7
EL		20	42	36	2
ES		23	49	24	4
FR		18	53	24	5
HR		25	43	30	2
IT		27	45	22	6
CY		31	41	24	4
LV		43	26	24	7
LT		63	14	18	5
LU		26	33	25	16
HU		37	29	31	3
MT		47	38	10	5
NL		50	23	22	5
AT		37	29	31	3
PL		59	21	17	3
PT		27	49	19	5
RO		25	40	33	2
SI		40	27	29	4
SK		28	40	24	8
FI		29	24	40	7
SE		33	28	33	6
UK		25	28	31	16






























QC21.3 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

Broadband Internet coverage and mobile phone services (%)

		Improved	Got worse	Stayed about the same	Don't know
EU28		64	9	16	11
BE		73	12	9	6
BG		68	6	9	17
CZ		71	6	16	7
DK		71	5	13	11
DE		54	9	27	10
EE		68	5	8	19
IE		68	10	15	7
EL		66	7	12	15
ES		73	6	11	10
FR		62	11	15	12
HR		62	14	17	7
IT		58	11	16	15
CY		80	5	6	9
LV		74	4	9	13
LT		71	4	12	13
LU		66	4	8	22
HU		73	9	10	8
MT		78	5	2	15
NL		79	3	9	9
AT		66	9	18	7
PL		79	9	8	4
PT		61	3	20	16
RO		61	17	15	7
SI		80	6	9	5
SK		67	8	14	11
FI		71	5	13	11
SE		89	3	5	3
UK		56	8	18	18






























QC21.4 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?

Access to social, health and cultural services (%)

		Improved	Got worse	Stayed about the same	Don't know
EU28		34	32	25	9
BE		47	26	24	3
BG		25	37	33	5
CZ		37	27	32	4
DK		34	30	25	11
DE		26	33	32	9
EE		28	39	20	13
IE		52	23	17	8
EL		30	36	29	5
ES		45	27	20	8
FR		29	44	17	10
HR		21	38	38	3
IT		31	33	27	9
CY		54	15	19	12
LV		34	34	23	9
LT		30	33	30	7
LU		52	11	16	21
HU		31	39	24	6
MT		72	11	8	9
NL		43	22	23	12
AT		35	26	35	4
PL		60	17	19	4
PT		39	27	27	7
RO		32	34	30	4
SI		50	16	30	4
SK		38	32	23	7
FI		25	46	19	10
SE		19	56	19	6
UK		31	27	25	17

QC21.5 Compared with ten years ago, would you say things have improved, got worse or stayed about the same in rural areas in (OUR COUNTRY) when it comes to...?






























The participation of all individuals in social and economic life (i.e. social inclusion) (%)

		Improved	Got worse	Stayed about the same	Don't know
EU28		30	30	28	12
BE		33	33	28	6
BG		23	32	35	10
CZ		31	23	37	9
DK		26	23	31	20
DE		25	29	35	11
EE		23	28	21	28
IE		54	17	19	10
EL		26	32	35	7
ES		39	28	23	10
FR		21	41	22	16
HR		16	43	36	5
IT		27	33	29	11
CY		46	19	24	11
LV		23	35	27	15
LT		30	25	35	10
LU		37	15	23	25
HU		29	32	32	7
MT		67	9	10	14
NL		34	22	29	15
AT		34	22	38	6
PL		58	17	18	7
PT		35	23	30	12
RO		28	34	30	8
SI		45	17	32	6
SK		32	32	25	11
FI		23	32	30	15
SE		19	37	31	13
UK		27	25	27	21

QC22 Which of the following should be the priority for research and innovation in the agri-food sector?

(MAX. 2 ANSWERS)

(%)

		Ensuring supplies of healthy food in the long term	Contributing to a better management of natural resources	Providing sustainable solutions to protect plants and animals from diseases and pests	Supporting the development of ecological approaches to farming	Promoting sustainable growth and job creation in rural areas	Developing and sharing knowledge in farming and rural areas	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28		41	26	29	26	31	17	1	1	7
BE		48	32	32	28	24	21	1	0	1
BG		50	18	23	22	38	19	1	1	7
CZ		50	24	31	26	28	12	1	2	2
DK		43	15	39	41	30	15	1	0	3
DE		52	15	38	30	23	12	1	3	4
EE		38	20	22	19	36	16	1	2	16
IE		47	24	28	17	39	22	0	1	6
EL		41	29	28	26	36	29	1	0	2
ES		38	32	21	21	41	21	0	1	5
FR		30	38	32	34	35	14	0	0	4
HR		42	21	19	21	37	22	0	1	4
IT		39	29	24	25	35	19	1	1	5
CY		37	30	35	31	28	21	0	0	4
LV		39	20	20	22	47	20	1	2	4
LT		43	19	23	25	44	17	2	1	5
LU		33	35	36	32	22	10	3	1	5
HU		54	21	24	17	34	21	0	1	3
MT		47	23	29	17	25	15	1	1	9
NL		30	29	46	34	25	25	1	0	2
AT		50	17	35	27	28	22	2	1	2
PL		34	28	22	30	27	16	2	1	9
PT		43	34	25	26	37	14	0	1	6
RO		36	23	24	22	35	22	3	2	6
SI		49	28	20	30	20	23	2	1	3
SK		43	20	23	24	29	20	2	0	8
FI		58	24	30	23	35	13	1	1	3
SE		45	44	37	26	28	10	0	1	2
UK		40	18	25	16	26	15	0	1	20