Special Eurobarometer 440

Summary

Europeans, Agriculture and the CAP

Fieldwork
October 2015
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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

Special Eurobarometer 440 – Wave EB84.2 – TNS opinion & social

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(DG COMM "Strategy, Corporate Communication Actions and Eurobarometer" Unit)

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INTRODUCTION

The Common Agricultural Policy (CAP) was introduced in 1962. It is a partnership between agriculture and society, between Europe and its' farmers. It is a common policy for all the Member States of the European Union and is managed, and 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 improve agricultural productivity so that consumers have a stable supply of affordable food, and to ensure that EU farmers can make a reasonable living.

The CAP continues to be adapted to respond to the challenges of its time. Now, more than fifty years after the introduction of the CAP, with more than 500 million consumers needing a reliable source of affordable, healthy and nutritious food, the EU has had to address a number of current and future challenges. These include:

- global competition,
- economic and financial crises,
- climate change and sustainable management of the natural resources,
- food security,
- rising costs such as fuel and fertiliser.

Significant reforms have been made in recent years, to modernise the sector and make it more market oriented. Most notably, in 2013, after three years of intensive discussion and negotiations, the policy was reshaped to meet the challenges of the future, 2014-2020.

The new CAP is designed to ensure direct support will become fairer and greener, strengthen the position of the farmers in the food chain and the policy as a whole will become more efficient and more transparent.

With over 18 months passing since the introduction of the new CAP reforms, the Directorate-General for Agriculture and Rural Development was interested in consulting European public opinion once again to monitor views on agriculture and the CAP.

This survey was carried out by the TNS Opinion & Social network in the 28 Member States of the European Union between 17 and 26 October 2015. 27,822 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 ("Strategy, Corporate Communication Actions and Eurobarometer" 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	Latvia	LV
Czech Republic	CZ	Luxembourg	LU
Bulgaria	BG	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Greece	EL	Poland	PL
Spain	ES	Portugal	PT
France	FR	Romania	RO
Croatia	HR	Slovenia	SI
Ireland	IE	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus*	CY	Sweden	SE
Lithuania	LT	United Kingdom	UK

European Union – weighted average for the 28 Member States	EU28
BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK, LV, LT	Euro area
BG, CZ, DK, HR, HU, PL, RO, SE, UK	Non euro area

* 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. The interviews carried out in the part of the country that is not controlled by the government of the Republic of Cyprus are included in the

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.

I. AGRICULTURE IN THE EU: PERCEIVED IMPORTANCE AND MAIN OBJECTIVES OF THE EU IN TERMS OF AGRICULTURE AND RURAL DEVELOPMENT POLICY

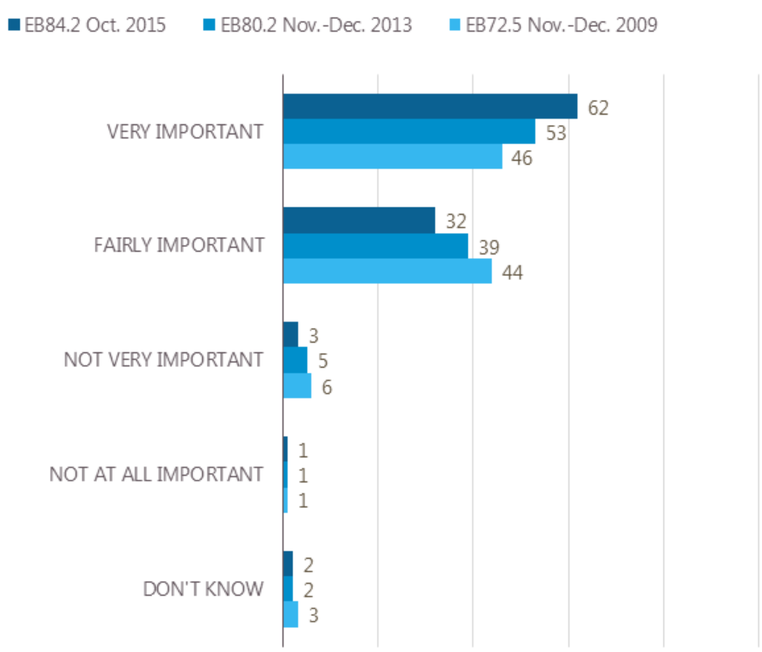
1 The perceived importance of agriculture and rural areas in the EU

Europeans were asked how important they think agriculture and rural areas are for their future, within the EU[1].

More than nine out of ten respondents in the EU (94%) hold the view that agriculture and rural areas are important for their future. This represents a 2-point increase since the previous survey conducted in November 2013.

Public opinion has strengthened on this topic: a large proportion of Europeans now consider these areas to be "very important" for their future, with notable increases in the level of importance from the previous surveys (62%, +9 percentage points since 2013, +16pp since 2009), whilst 32% consider that they are "fairly important" (-7pp since 2013, -12pp since 2009). In comparison, in 2009, we observed similar proportions of fairly (44%), and very important (46%).

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



Whilst the majority of respondents across all EU Member States, consider both agriculture and rural areas to be important for their future, there are differences across countries with regards to the degree of importance respondents have in regards to these areas: at least four out of five respondents in Luxembourg (85%), Slovenia (81%) and Malta (80%) consider agriculture and rural areas to be "very important". In comparison, just around half of respondents in Italy (50%), Poland (51%) and the Netherlands (53%) consider these areas to be "very important" for their future.

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

2 The responsibilities of farmers in our society

Respondents were asked to consider what they think should be the two main responsibilities of farmers in our society[2]. This question was also asked during the previous Eurobarometer survey in November 2013.

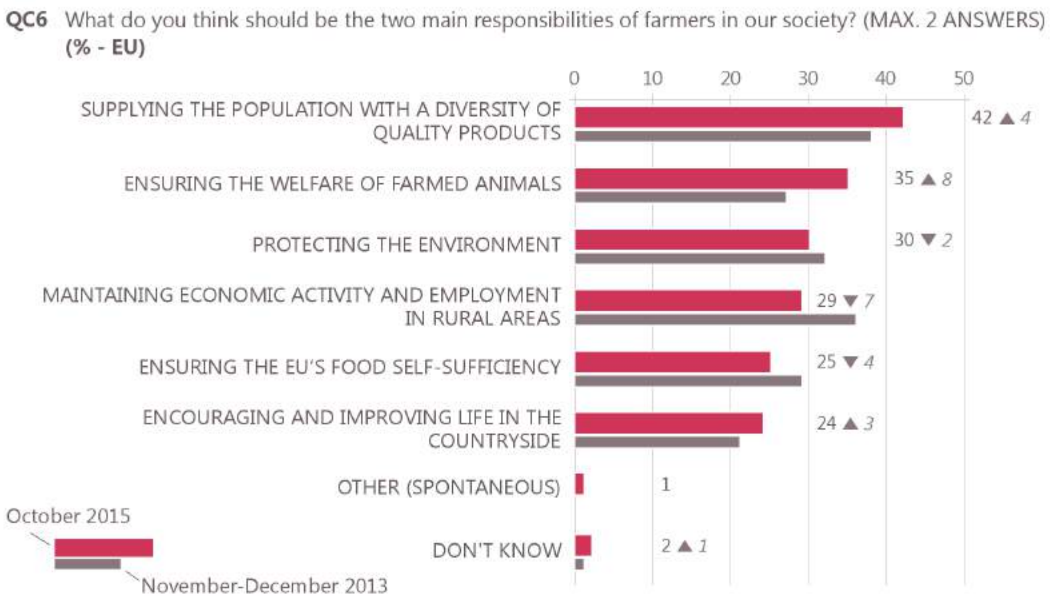
As in the previous survey, EU respondents are most likely to mention "**supplying the population with a diversity of quality products**" (42%, +4 percentage points since 2013) as one the top main responsibilities for farmers in our society.

The second most mentioned responsibility is "**ensuring the welfare of farmed animals**" (35%). This particular responsibility has also experienced notable increased support since the last survey (+8pp), when it was ranked as the fifth most mentioned responsibility. "**Protecting the environment**" comes in third position (30%, -2pp).

In fourth position, "**maintaining economic activity and employment in rural areas**" appears to be of lesser importance to EU respondents (29%, -7pp). In 2013, it was the second most mentioned responsibility for farmers.

One in four mentioned a farmer's main responsibility to be "**ensuring the EU's food self-sufficiency**"; however, since 2013, support has declined by four percentage points to 25%.

The least mentioned responsibility for farmers by Europeans is "**encouraging and improving life in the countryside"** with 24% of Europeans of the view this is a main responsibility of a farmer, with increased support since 2013 (+3pp).



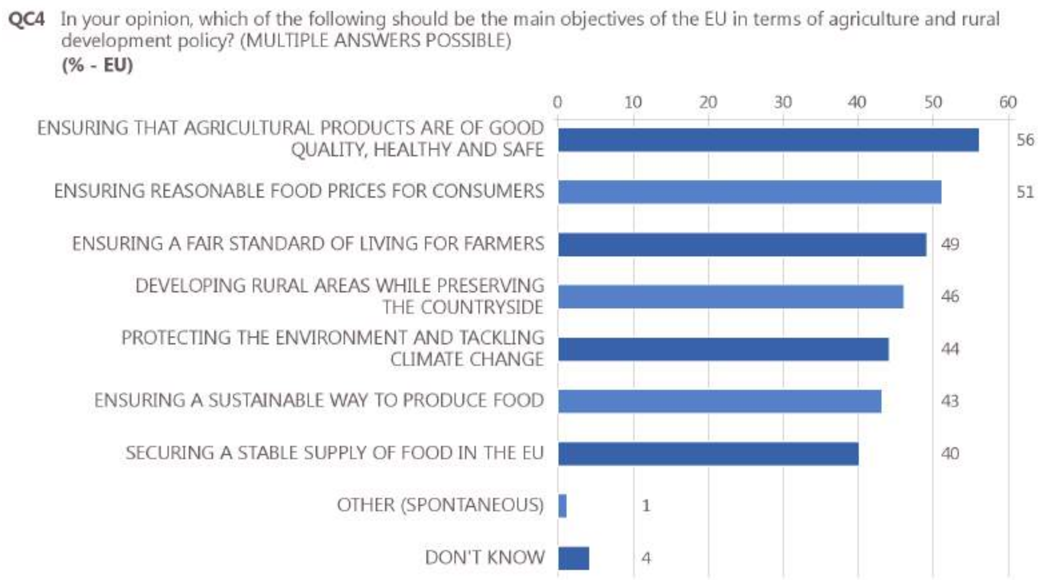
[2] QC6. What do you think should be the two main responsibilities of farmers in our society? ANSWERS Protecting the environment; Maintaining economic activity and employment in rural areas; Ensuring the EU's food self-sufficiency; Supplying the population with a diversity of quality products; Ensuring the welfare of farmed animals; Encouraging and improving life in the countryside; Other; Don't know.

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

Europeans were asked for their opinion on what the main objectives for the EU should be in terms of agriculture and rural policy[3].

More than half of the respondents (56%) in the EU hold the view that "ensuring agricultural products are of good quality, healthy and safe" should be one of the main objectives for the EU. "Ensuring reasonable food prices for consumers" (51%) is second highest to be mentioned as one of the EU's main objectives, followed very closely by "ensuring a fair standard of living for farmers" (49%).

The least mentioned objective out of the seven provided to respondents is "securing a stable supply of food in the EU" however at 40%, a considerable proportion of respondents still consider this to be one of the main objectives for the EU in terms of agriculture and rural policy.



Ensuring agricultural products are of good quality, healthy and safe is the most frequently mentioned objective for 16 of the 28 Member States, with the highest proportion of respondents citing this in France (72%), the Netherlands (72%), Malta (71%) and Luxembourg (71%).

There are five Member States where respondents consider **ensuring reasonable food prices for consumers** as the leading main objective for the EU. A high proportion of respondents from Greece (74%) take this view, as do respondents from Cyprus (65%) and Slovakia (62%).

Ensuring a fair standard of living for farmers is the top objective mentioned by respondents in five of the 28 Member States: Belgium (62%), Spain (62%), Romania (59%), Ireland (56%) and the United Kingdom (54%). The country with the lowest proportion of respondents holding this view is Italy (25%).

[3] 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; Don't know; Other (spontaneous).

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

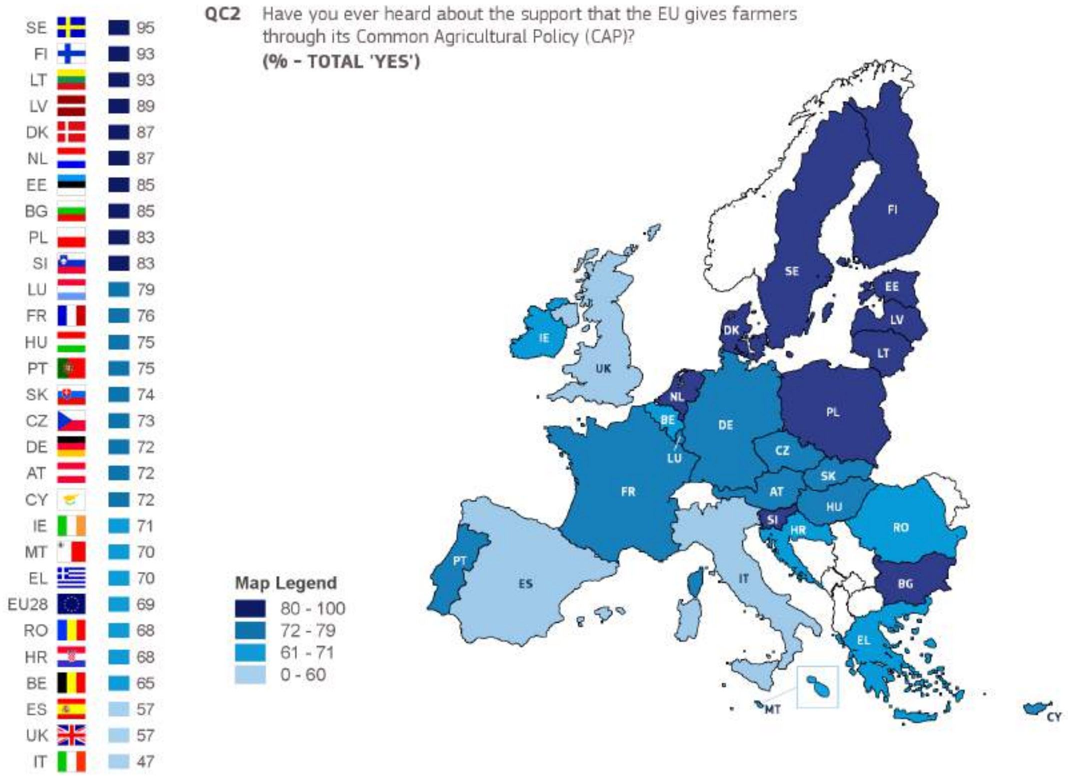
1 Awareness of the CAP

Overall, more than two thirds of European respondents have heard about this support (69%, +5 percentage points since 2013)[4]. Since the previous survey, there has been an increase in the proportion of Europeans who have heard about the CAP, but do not really know the details (59%, +3pp). One in ten European respondents claim they are aware of the CAP, and know the details (10%, +2pp).

A country analysis reveals wide ranges of respondent awareness across the European Union:

More than nine out of ten respondents in Sweden (95%), Finland (93%) and Lithuania (93%) are aware of the support the CAP provides farmers, with high awareness levels also reported Latvia (89%) and the Netherlands (87%) and Denmark (87%).

Awareness is much less pronounced in Italy (47%), Spain and the United Kingdom (both 57%).



In Lithuania (24%) and Ireland (20%), one in five respondents or more claim they know about the CAP and its details. This is almost twice the proportion of most other countries, with the exception of Poland (18%), Romania (18%) and Cyprus (18%).

Yes, have heard about the support, and know the details – there is very little change in trend since the last survey for most countries, with the exception of Lithuania (+9 percentage points since 2013), Cyprus (+7pp), Ireland (+7pp), Austria (+6pp) and Sweden (+6pp).

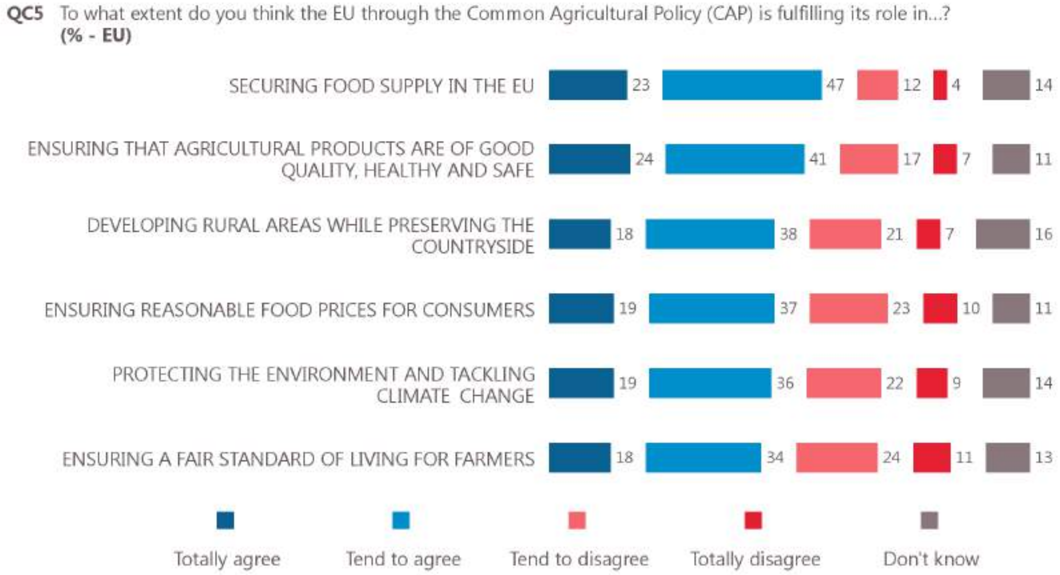
[4] QC2 Have you ever heard about the support that the EU gives farmers through its Common Agricultural Policy (CAP)? ANSWERS Yes, and you know the details; Yes, but you don't really know the details; No, you have never heard of it, Don't Know.

2 The perceived performance of the CAP

Europeans were asked for their opinions on how the EU through the Common Agricultural Policy is fulfilling its role across a variety of topics[5].

Europeans are more likely to agree the EU is fulfilling its role in "securing the food supply in the EU" (70% "agree") with a high proportion of respondents who "totally agree" (23%). Close to two-third of respondents agree the EU is fulfilling its role in "ensuring agricultural products are of good quality, healthy and safe" (65%).

However, respondents seem less convinced the EU is fulfilling its role in developing rural areas (56%), ensuring reasonable food prices (56%), protecting the environment (55%) and ensuring a fair standard of living for farmers (52%). Whilst the majority agree the EU is fulfilling its role in these areas, a high proportion of Europeans disagree the EU is fulfilling its role in ensuring a fair standard of living for farmers (35%), reasonable food prices (33%), protecting the environment (31%) and developing rural areas while preserving the countryside (28%).



Ensuring a fair standard of living for farmers: in 20 of the 28 EU Member States, more than half of respondents agree the EU is fulfilling its role in ensuring a fair standard of living for farmers. Respondents in Ireland (69%), Hungary (69%) and Malta (68%) are more likely to agree with this statement than respondents in France (34%), Estonia (34%) and Sweden (42%).

To develop rural areas while preserving the countryside: with the exception of two Member States, a relative majority of respondents agree the EU is fulfilling its role in this area. Countries with the highest proportion of respondents agreeing the EU is fulfilling its role in this area include Hungary (73% "agree") and Lithuania (71%).

Ensuring reasonable food prices for consumers: more than 50% of respondents in 20 countries agree the EU is fulfilling its role this area. The highest proportions are observed in the Netherlands (74%) and Germany (68%).

Securing food supply in the EU: in all countries, the majority of respondents agree the EU is fulfilling its role in securing food supply in the EU. The Netherlands (84%), Hungary (82%) and

[5] 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; Developing rural areas while preserving the countryside; Ensuring reasonable food prices for consumers; Securing food supply in the EU; Protecting the environment and tackling climate change; Ensuring that agricultural products are of good quality, healthy and safe ANSWER : Totally agree, Tend to agree, Tend to disagree, Total disagree, Don't know

Germany (82%) have the highest proportion of respondents who "agree" in comparison to 58% of respondents in Sweden.

Protecting the environment and tackling climate change: in all but one EU Member State, a relative majority of respondents agree the EU is fulfilling its role in protecting the environment and tackling climate change. Levels of agreement from respondents across countries are wide ranging, from highs in Hungary (75%), the Netherlands (74%) and Malta (70%) to a low of 36% of respondents in France.

Ensuring that agricultural products are of good quality, healthy and safe: the majority view across all EU countries is that the EU is fulfilling its role in this area with wide ranging levels of support. Respondents in the Netherlands have the highest proportion in agreement (87%) compared to 47% support from respondents in France.

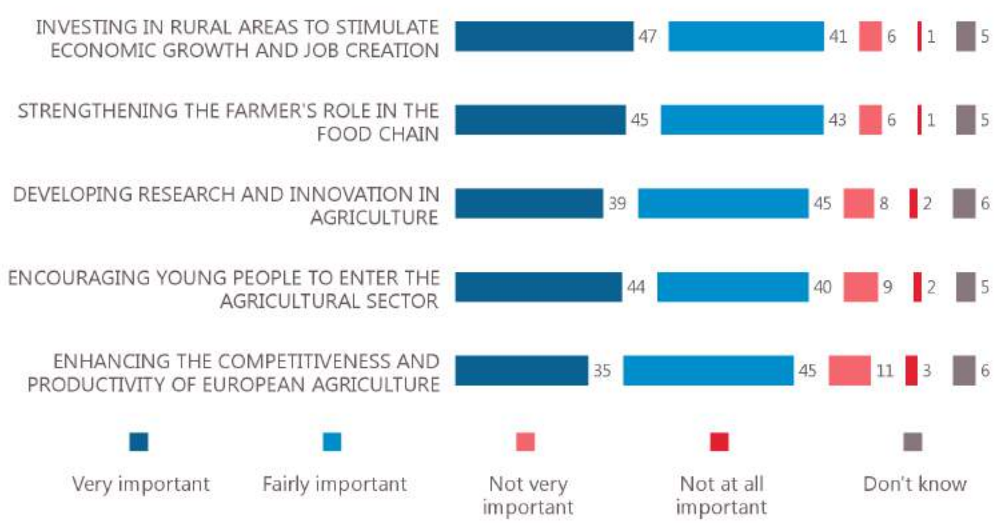
3 The perceived importance of the priorities of the CAP

The respondents were asked to rate the importance they think a number of priorities of the Common Agricultural Policy should be[6].

More than four out five Europeans rate all of the priorities as "important" with respondents more like to mention two priorities slightly more often. "Investing in rural areas to stimulate economic growth and job creation" (88%) and "strengthening the farmer's role in the food chain" (88%) are ahead of the other priorities, by 4-8 percentage points. Both of these priorities had large proportions of respondents regarding them as "very important", (47% and 45% respectively).

"Developing research and innovation in agriculture" had less Europeans considering this to be a "very important" priority (39%) and similarly "enhancing the competitiveness and productivity of European agriculture" (35%).

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



[6] How important do you think the following priorities of the Common Agricultural Policy (CAP) are? Investing in Rural areas to stimulate economic growth and job creation; Strengthening the farmers role in the food chain; Developing research and innovation in agriculture; encouraging young people to enter the agricultural sector; enhancing the competitiveness and productivity of European Agriculture. ANSWERS Very important, Fairly important, Not very important, Not at all important, Don't know

Enhancing the competitiveness and productivity of European agriculture: more than 70% of respondents in 26 countries consider enhancing the competitiveness and productivity of European agriculture to be an "important" priority with respondents in Portugal (93%), Bulgaria (90%), Greece (90%) and Cyprus (90%) clearly of this view with significant proportions indicating it is "very important".

Developing research and innovation in agriculture: across all EU Member States, more than 70% of respondents consider developing research and innovation to be an "important" priority.

In seven countries, at least 50% of respondents are more likely to consider this priority as "very important" than "fairly important" - Ireland (57%), Bulgaria (57%) and Romania (56%) have the highest proportions of respondents considering this priority as "very important".

Investing in rural areas to stimulate economic growth and job creation: in all EU Member States, more than four out of five respondents view this as an "important" priority for the CAP. The countries with the highest proportion of respondents with this view include Bulgaria (96%), Cyprus (96%), Portugal and Slovakia (both 95%).

In 16 countries, more than 50% of respondents consider this priority to be "very important" – Bulgaria (79%), Latvia (69%), Cyprus (68%) and Romania (66%) are countries with the highest proportions of respondents who consider this priority to be "very important".

Strengthening the farmer's role in the food chain: again, more than four out of five respondents across all countries view this as an "important" priority for the CAP. Respondents in Slovakia (95%), Bulgaria, Portugal, Finland and Cyprus (all 93%) were more likely to consider this as an "important" priority in comparison with respondents in the Netherlands (80%) and Denmark (80%).

Encouraging young people to enter the agricultural sector: in 26 countries, more than four out of five respondents consider this to be an "important" priority for the CAP to address. A higher proportion of respondents in Bulgaria, Greece, Portugal, Cyprus and Slovakia (all 94%) are more likely to have this view than respondents in the Netherlands (68%) and Denmark (73%).

4 The contribution of the CAP

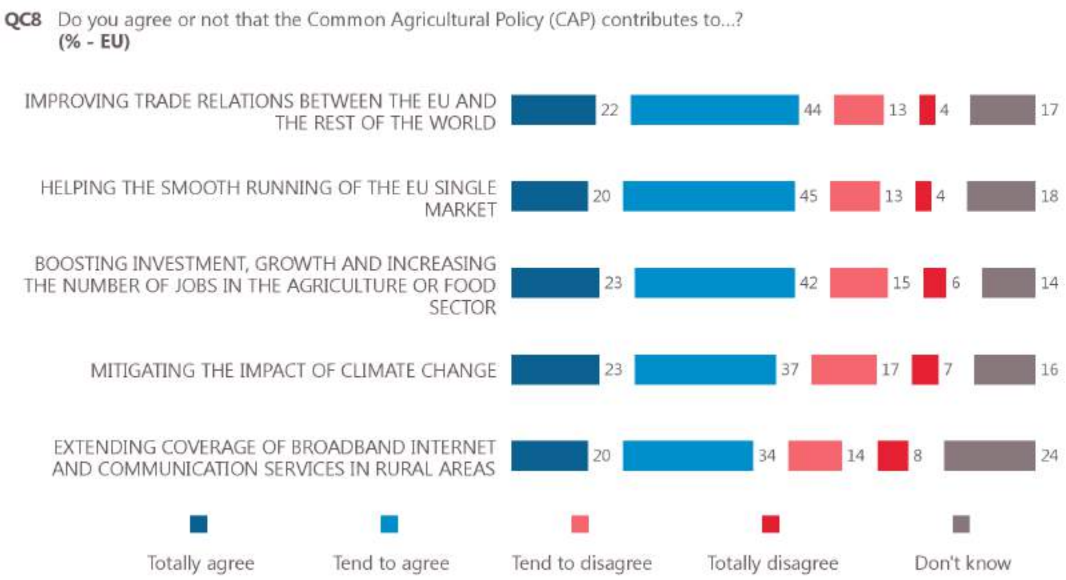
Europeans were asked whether they agree or not that the Common Agriculture Policy contributes to a variety of statements[7].

Overall, the majority of Europeans agree that the CAP contributes to improving trade relations (66%), helps the smooth running of the EU (65%), boosts investment and increases jobs (65%), mitigates climate change (60%) and is extending broadband Internet coverage and communication services in rural areas (54%).

More than one in five respondents disagree that the CAP is contributing to extending coverage of broadband Internet and communication services in rural areas (22%) and an additional 24% of respondents answer that they "don't know".

Almost one in four respondents "disagree" that the CAP is contributing to mitigating the impact of climate change (24%).

[7] QC8. Do you agree or not that the Common Agricultural Policy (CAP) contributes to ...? Boosting investment, growth and increasing the number of jobs in the agriculture or food sector; 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. ANSWERS Totally agree; Tend to agree, Tend to disagree, Totally disagree, Don't know



Boosting investment, growth and increasing the number of jobs in the agriculture or food sector: more than one in two respondents in 26 Member States agree that the CAP contributes to boosting investment, growth and jobs in the agriculture and food sectors. Respondents in Malta, Italy and Hungary are more likely to agree with 78% of respondents indicating their support for this statement. Less than 50% of respondents in France and Sweden however agree this is the way the CAP contributes to the agriculture and food sectors.

Helping the smooth running of the EU Single Market: the level of agreement amongst respondents varies across countries significantly. For example, 76% of respondents in Portugal and Hungary agree the CAP is contributing to the smooth running of the EU single market whilst only 48% of respondents in Latvia agree with this view.

Improving trade relations between the EU and the rest of the world: in 27 Member States, more than 50% of respondents “agree” the CAP is contributing to improving trade relations with the rest of the world. Respondents in Italy (77%), Portugal (76%) and Hungary (76%) are more likely to agree the CAP is helping improve trade relations than France (48%) and Sweden (51%).

Mitigating the impact of climate change: at least 50% of respondents in 23 countries “agree” the CAP is contributing to mitigating the impact of climate change with Malta (76%), Italy (74%), Germany (72%) and Hungary (72%) being the countries with the highest levels of agreement from respondents.

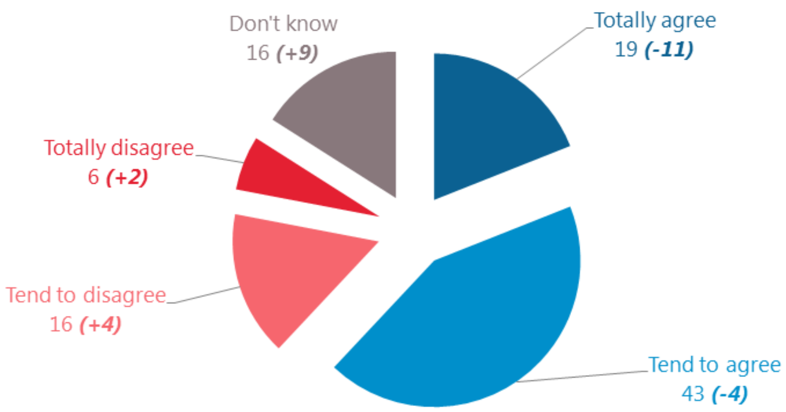
Extending Coverage of broadband Internet and communication services in rural areas: in 26 countries, more respondents agree than disagree that the CAP is contributing to extending the coverage of broadband Internet with respondents in Poland (69%), Italy (66%) and Hungary (66%) more likely to agree, than respondents in Sweden (39%) and France (42%) where most still “agree”.

5 Does the CAP only benefit farmers?

Respondents were asked to what extent they agree that the Common Agricultural Policy (CAP) benefits all European citizens and not only farmers[8]. This question was also asked during the previous survey conducted in November 2013.

More than six Europeans in ten (62%) agree that the CAP benefits all European citizens and not only farmers. Since the last survey conducted in 2013, there is a 15-point decline in "total agreement".

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)



(October 2015 - November-December 2013)

In all EU countries with the exception of two, more than half of the respondents agree that the CAP benefits all European citizens. Respondents in Malta (87%) and Cyprus (80%) are most likely to agree with this statement with very high levels of respondents who "totally agree" (Malta 52% and Cyprus 48%). In comparison, less than half of respondents in France (45%) and the United Kingdom (49%) agree that the CAP benefits all, with only 11% of respondents in each country strongly agreeing.

There are 13 Member States with greater than a 10-point decline since 2013 in the proportion of respondents who "agree" with the statement. The largest declines are seen in the United Kingdom (49%, -21 percentage points since 2013), Belgium (65%, -20pp), Spain (58%, -19pp) and France (45%, -19pp).

[8] 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. ANSWERS Totally agree, Tend to Agree, Tend to disagree, Totally disagree, Don't know.

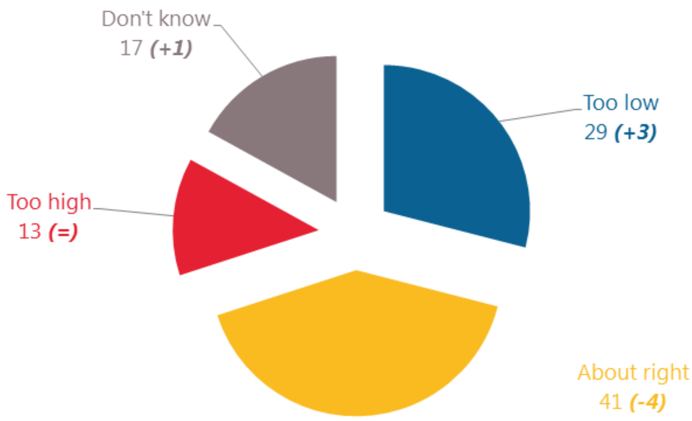
III. FINANCIAL AID FOR FARMERS AND THE CAP BUDGET

1 Financial aid for farmers

After explaining the level of support the EU provides farmers, Europeans were asked whether the financial support provided to farmers by the EU is too low, about right or too high[9].

Over four Europeans in ten consider the financial support provided to farmers to be "about right" (41%, -4pp) with just under a third considering it be "too low" (29%, +3pp) and 13% mentioning it be "too high". The proportion of respondents who responded with "don't know" is high at 17%.

QC9 The EU gives financial support to farmers to help them to 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)



(October 2015 - November-December 2013)

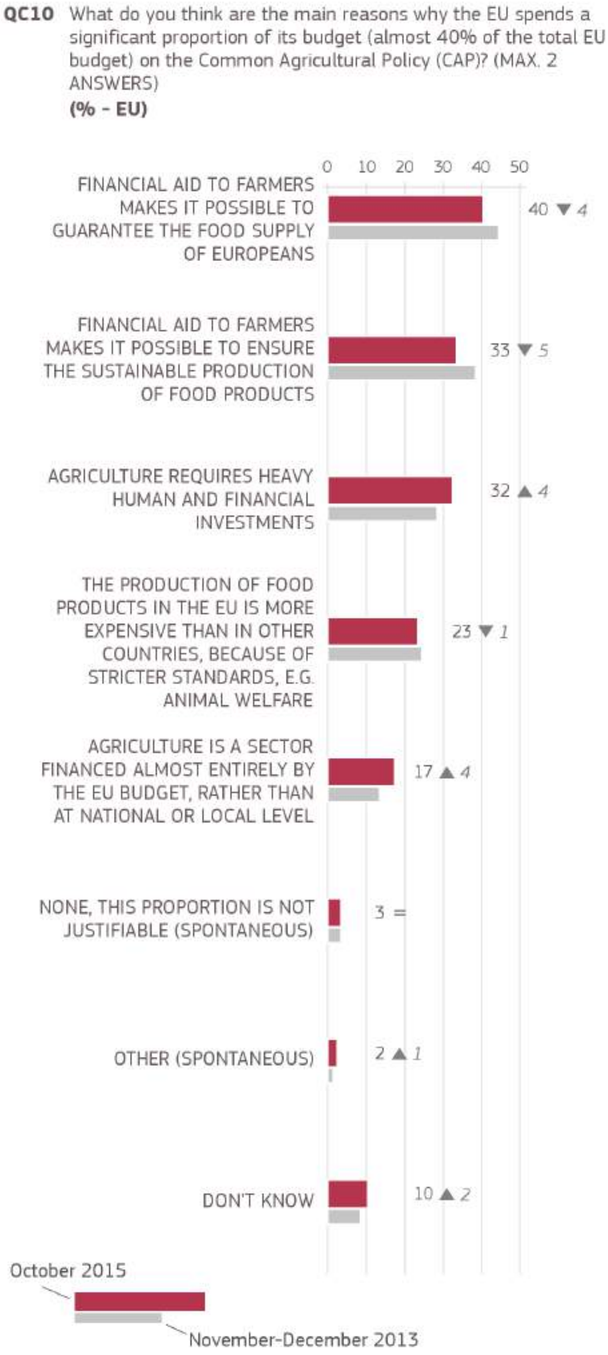
In 19 Member States, the relative majority of respondents consider the financial aid provided by the EU to be "about right". This is particularly the case in Czech Republic (53%), Finland (53%) and Ireland (52%).

The four countries where the proportion of respondents who consider the financial support to be "too low" are Latvia (66%, +17 percentage points since 2013), Romania (57%, +14pp) Estonia (45%, +12pp) and Cyprus (45%, +8pp). Since 2013, the majority view in these two latter countries has changed from "about right" to "too low".

A large proportion of respondents in Sweden (31%), the Netherlands (31%), Denmark (31%) think the aid is "too high", and similarly, to a lesser extent, so do 22% of respondents in Luxembourg.

[9] QC9 The EU gives financial support to farmers to help them 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 this support is too low, about right or too high? ANSWER Too low; About right; Too high; Don't know.

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



Europeans were asked what they think are the main reasons why the EU spends a significant proportion of its budget on the Common Agricultural Policy (CAP).

The most mentioned reason is "financial aid to farmers makes it possible to guarantee the food supply of Europeans" (40%); however, support for this reason has declined by four percentage points since the last survey. A similar decline has been observed for the second most mentioned reason, "…ensure the sustainable production of food products" (33%, -5 percentage points since 2013).

Compared with 2013, a greater proportion of respondents now recognise the heavy human and financial investments in agriculture as a reason why the EU spends a large proportion of its budget on the CAP (32%, +4pp).

A country analysis shows that **financial aid to farmers makes it possible to guarantee the food supply of Europeans** is the leading reason mentioned in 12 Member States, with considerable support from respondents in the United Kingdom (53%, +13 percentage points since 2013), Ireland (52%, +1pp) and Finland (50%, -5pp).

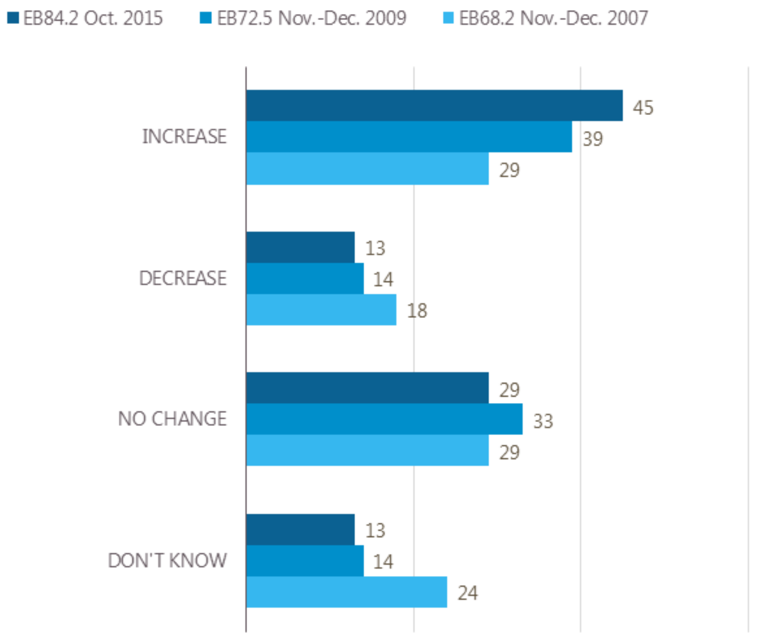
Financial aid to farmers makes it possible to ensure the sustainable production of food products is most mentioned in eight countries as the leading reason why respondents think the EU spends a significant amount of its budget on the CAP. Support for this reason has decreased in 20 EU countries since 2013.

The third most mentioned reason across Europe, **agriculture requires heavy human and financial investments** is the top answer in eight countries. Bulgaria has the highest proportion of respondents (44%, -4pp), followed by Lithuania (41%, +5pp), Slovakia (41%, +7pp) and Cyprus (41%, +8pp).

3 Future financial support to farmers

Europeans were then asked whether they would like to see an increase, decrease or no change in the EU financial support to farmers over the next ten years[10]. A relative majority of Europeans (45%) would like to see an increase to the EU financial support for farmers over the next ten years. This opinion has increased since 2009 (+6 percentage points) and November 2007 (+16pp). Just 13% would like a decrease in the EU financial support (-1pp since 2009). Slightly less than three Europeans in ten (29%, -4pp since 2009) consider "no change" being required.

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



The relative majority of respondents from 24 Member States are of the view that there should be an "increase" in EU financial support for farmers, with more than three out of four respondents thinking this in Latvia (84%, +22 percentage points since 2009), Romania (84%, +22pp) and Estonia (76%, +7pp), and slightly less in Malta (74%, +15pp) and Cyprus (74%, +24pp).

Whilst a relative majority of respondents also hold this view in Luxembourg (42%, +14pp) and Austria (38%, +4pp), there is also a high proportion of respondents in these countries who believe "no change" is required (Luxembourg 39%, -7pp and Austria 33%, -7pp).

In Finland (46%, -6pp), Germany (37%, -3pp), Ireland (36%, +9pp) and the Netherlands (36%, +4pp) most respondents think that "no change" is required in the level of EU financial support.

Denmark is the only country where most respondents think that there should be a "decrease" in the EU financial support for farmers over the next ten years, however opinion does seem to be divided. More than a third of respondents in Denmark (36%, +4pp) believe there should be a "decrease", less than a third believe no change is required (31%, -12pp) and (24%, +9pp) believe there should be an increase.

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

4 Opinions on the “cross-compliance” mechanism

Across all criteria, more than four out of five European respondents consider it is “justified” to reduce farmers’ subsidy payments if they do not respect the rules[11]. There has been very little change overall since November 2007: animal welfare standards (87%, +1 percentage point), environmental standards (87%, +2pp) and food safety standards (87%, -1pp)

However, the proportion of respondents who think it is “totally justified” has increased quite markedly for environmental standards (+7pp) and to a lesser extent for animal welfare standards (+4pp).

QC14 Under the rules of the Common Agricultural Policy (CAP), farmers' payments are linked to the requirement to comply with rules for the environment, food safety and animal welfare (so-called "cross compliance"). To what extent do you think that it is justified or unjustified to reduce farmers' subsidy payments to farmers who do not respect...?
(% - EU)

Food Safety Standards: the large majority of respondents from all EU countries are of the view that farmers’ subsidy payments should be reduced to farmers who do not respect the food safety standards, with respondents in some countries holding a stronger view than others. 82% of respondents in the Netherlands and Sweden believe it is “totally justified” to reduce farmers’ subsidy payments for those who do not respect the rules, in comparison to countries such as Italy where 44% of respondents think it is “totally justified”.

Animal Welfare Standards: in every EU country with the exception of two (Italy 78% and Romania 74%), more than four out of five respondents believe it is “justified” that farmers should have their subsidy payments reduced if they do not respect the animal welfare standards.

A high proportion of respondents in Sweden (88%), Denmark (79%) and the Netherlands (77%) are of the view it is “totally justified”.

Environmental standards: Finland has the highest proportion of respondents who believe it is “justified” to reduce farmers’ subsidy payments if they do not abide by the rules in regards to environmental standards, with 64% of respondents with a stronger view, considering it to be “totally justified” to reduce payments and 31% believe it to be “somewhat justified”.

[11] QC14. Under the rules of the Common Agricultural Policy (CAP), farmers’ payments are linked to the requirements to comply with rules for the environment, food safety and animal welfare (so called “cross compliance”). To what extent do you think that it is justified or unjustified to reduce farmers’ subsidy payments to farmers who do not respect ....? Food Safety Standards, Environmental Standards, Animal Welfare Standards ANSWER Totally justified; Somewhat justified; Somewhat unjustified; Totally unjustified; Don’t know.

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

After being explained that the EU is currently giving payments to farmers for carrying out agricultural practices beneficial to the climate and the environment (so called "greening"), respondents were then asked whether they were in favour or opposed to the EU continuing to do so[12].

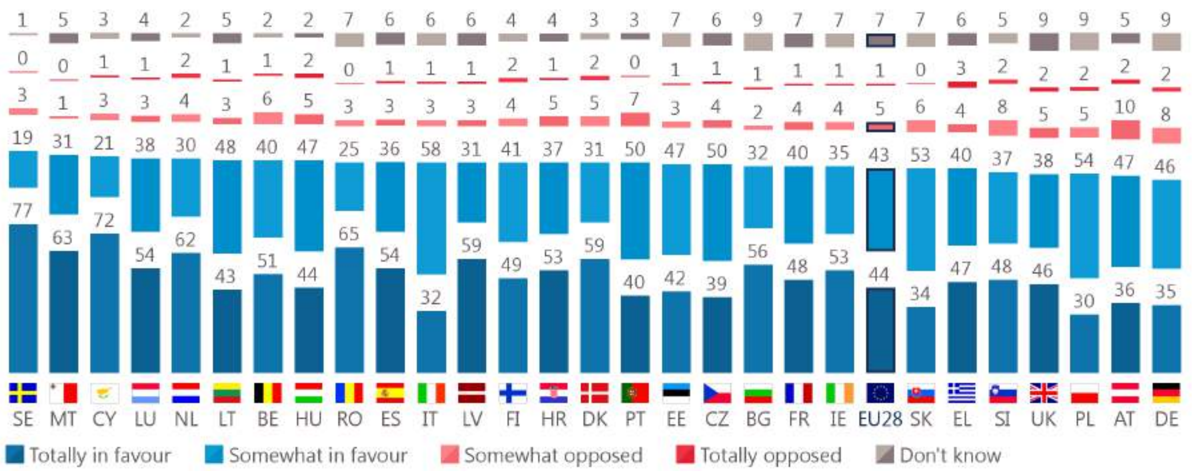
A large majority of Europeans are "in favour" of this policy continuing, with 87% of respondents "in favour" and only 6% "opposed" across Europe. 44% of respondents are "totally in favour" and 43% were "somewhat in favour".

More than four out of five respondents are "in favour" of the payments continuing across all Member States with the highest proportions in Sweden (96%), Malta (94%) and Cyprus (93%). These countries had a higher proportion of respondents who are "totally in favour" than many of the other countries: Sweden (77%), Cyprus (72%) and Malta (63%).

The countries with the highest proportions of respondents who are "opposed" include Austria (12%), Germany (10%) and Slovenia (10%).

QC15 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?

(%)



	SE	MT	CY	LU	NL	LT	BE	HU	RO	ES	IT	LV	FI	HR	DK	PT	EE	CZ	BG	FR	IE	EU28	SK	EL	SI	UK	PL	AT	DE
Don't know	1	5	3	4	2	5	2	2	7	6	6	6	4	4	3	3	7	6	9	7	7	7	7	6	5	9	9	5	9
Totally opposed	0	0	1	1	2	1	1	2	0	1	1	1	2	1	2	0	1	1	1	1	1	1	0	3	2	2	2	2	2
Somewhat opposed	3	1	3	3	4	3	6	5	3	3	3	3	4	5	5	7	3	4	2	4	4	5	6	4	8	5	5	10	8
Somewhat in favour	19	31	21	38	30	48	40	47	25	36	58	31	41	37	31	50	47	50	32	40	35	43	53	40	37	38	54	47	46
Totally in favour	77	63	72	54	62	43	51	44	65	54	32	59	49	53	59	40	42	39	56	48	53	44	34	47	48	46	30	36	35

[12] QC15. 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? ANSWER. Totally in favour; Somewhat in favour; Totally opposed; Don't know.

IV. INFORMATION ABOUT THE CAP

1 The wish to receive more information about the CAP

Europeans were asked whether they would like to receive more information about the Common Agricultural Policy[13].

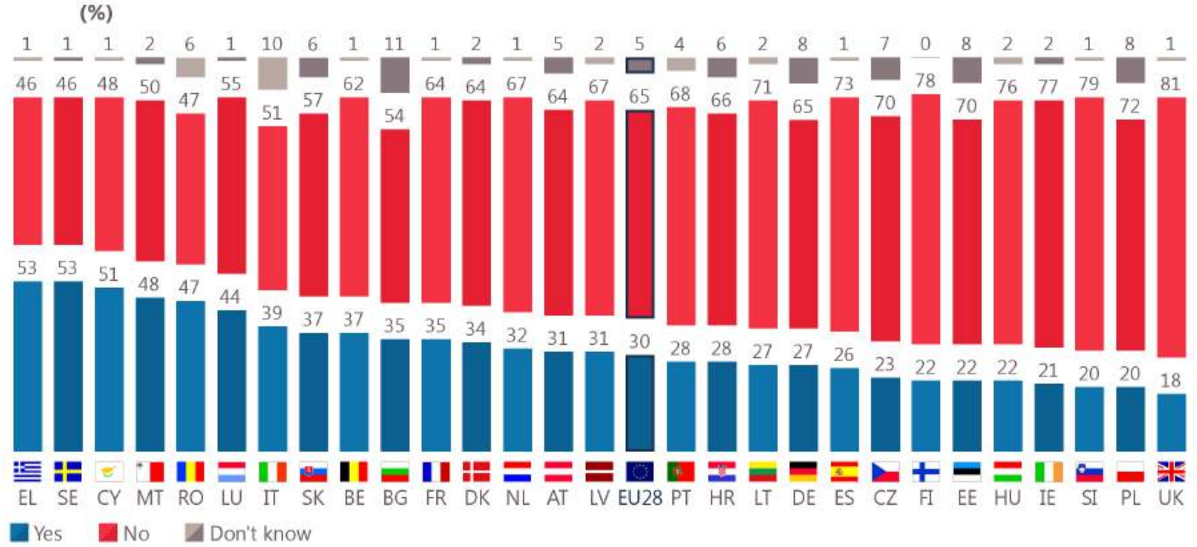
Almost two thirds of Europeans (65%) say that they would not like to receive more information about the CAP, whilst 30% indicate they would like to receive additional information, and 5% say that they “don’t know”.

In three countries, more than one in two respondents say that they would like more information about the CAP: Sweden (53%), Greece (53%) and Cyprus (51%).

In 24 Member States, at least half of respondents answer that they would not like more information about the Common Agricultural Policy. The view is strongest in the United Kingdom where 81% of respondents would not like to receive more information about the CAP. Similarly, more than three quarters of respondents in Slovenia (79%), Finland (78%), Ireland (77%) and Hungary (76%) would not like to receive more information.

QC16 Would you like to receive more information about the Common Agricultural Policy?

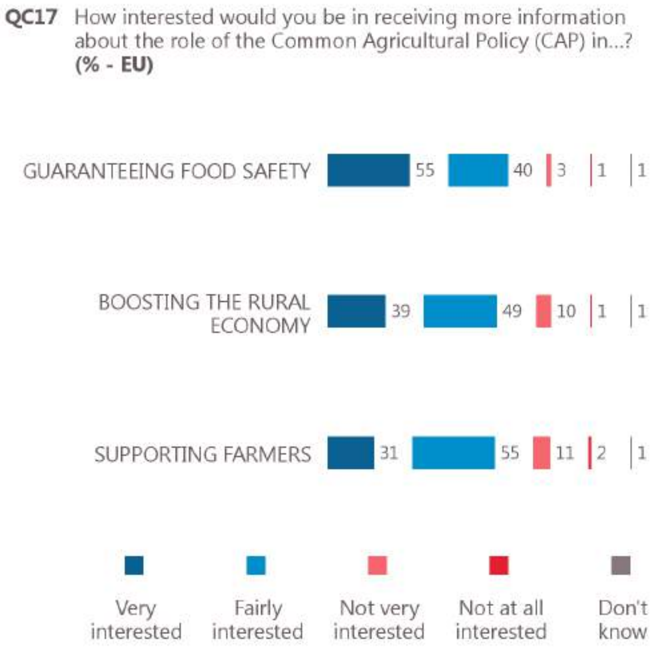
(%)



[13] QC16 Would you like to receive more information about the Common Agricultural Policy? ANSWER Yes, No, Don’t Know

2 The type of information respondents would be willing to receive

More than four out of five of these respondents expressed "interest" in receiving more information about all of the topics. **Guaranteeing food safety** had the highest proportion of Europeans who were "very interested" (55%) followed by **boosting the rural economy** (39%) and **supporting the farmers** (31%). One in ten European respondents are "not very interested" in more information about **boosting the rural economy** (10%) or **supporting farmers** (11%).



Respondents who would like to receive more information about the CAP (30% of the total sample)

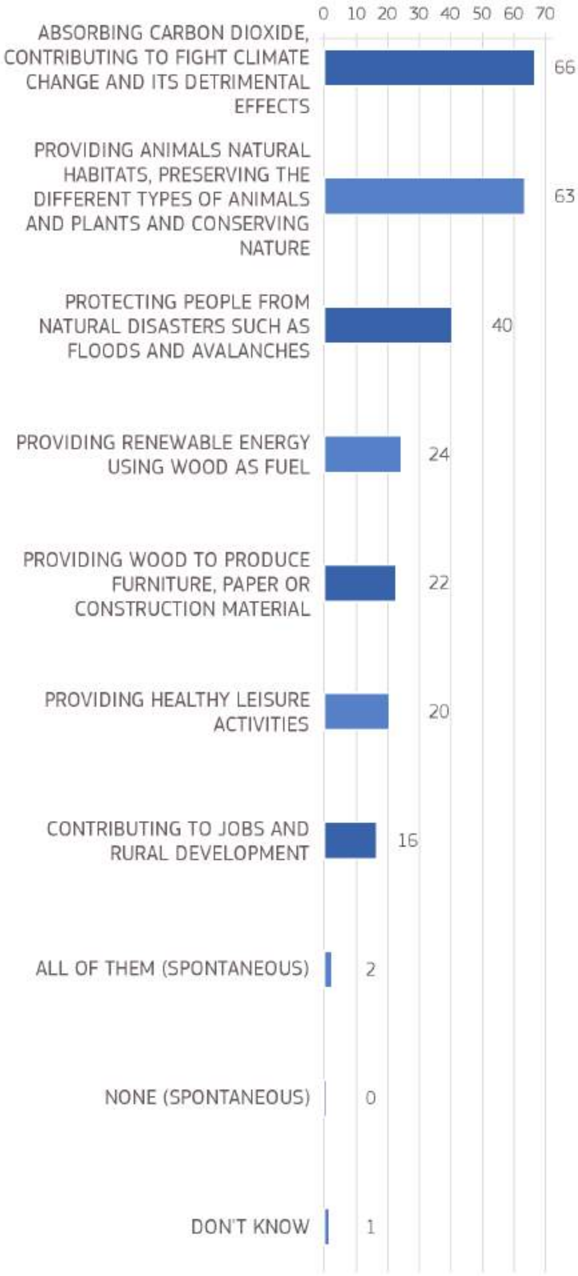
Guaranteeing food safety and the role of the CAP is a topic more than nine of ten respondents from nearly all Member States are "interested" in receiving more information about. More than half of respondents across 23 Member States indicated they are "very interested" in receiving more information about guaranteeing food safety, with large proportions of respondents in Cyprus (76%), Bulgaria (75%) and the Czech Republic (74%) indicating they are "very interested".

There are 27 Member States where more than four out of five respondents are "interested" in receiving more information about the role of the CAP in **boosting the rural economy**. Countries with the highest proportions of "interested" respondents include Spain (95%), Bulgaria (95%) and Hungary (94%).

Across the Member States, of the respondents who would like to receive more information about the CAP, the majority are "interested" in receiving more information about the role of the Common Agricultural Policy in **supporting farmers.** There are three countries where more than nine out of ten respondents are "interested" in receiving more information about supporting farmers: Spain (94% "interested"), Ireland (91%) and the United Kingdom (90%).

V. THE BENEFITS PROVIDED BY FORESTS

QC13 What do you think are the most important benefits provided by forests? (MAX. 3 ANSWERS)
(% - EU)



The important benefit provided by forests mentioned the most by two thirds of European respondents is “absorbing carbon dioxide, contributing to fight climate change and its detrimental effects” (66%).

It is followed by “providing the animals natural habitats, preserving the different types of animals and plants and conserving nature”, cited by 63% of respondents. These two first benefits are much more cited than the others.

Two out of five respondents also mentioned an important benefit forest provides is “protecting people from natural disasters such as floods and avalanches” (40%).

At least one in five Europeans believe the benefits forests provide include providing renewable energy using wood as fuel (24%), providing wood to produce furniture and other products (22%) and providing healthy leisure activities (20%). Few respondents felt “contributing to jobs and rural development” is an important benefit that forests provide, with only 16% mentioning this.

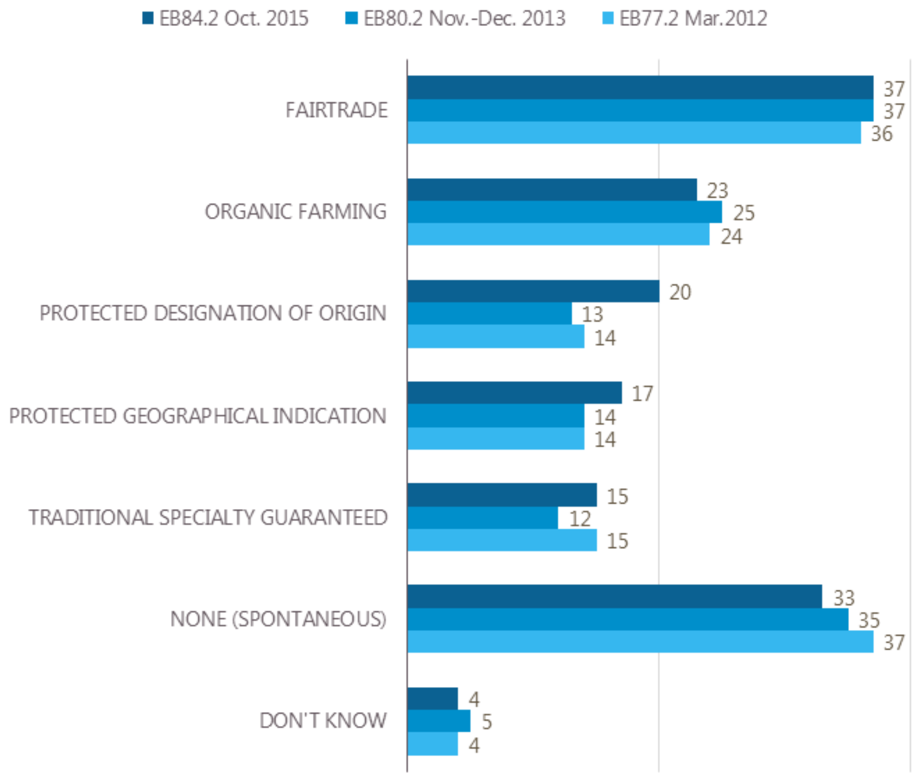
In 16 Member States, **absorbing carbon dioxide, contributing to fight climate change and its detrimental effects** is most likely to be mentioned as being the most important benefit provided by forests. This view is particularly strong with four out of five respondents mentioning this benefit from within the Netherlands (85%), Luxembourg (80%) and Cyprus (80%).

With the exception of Romania (46%), at least half of respondents in every Member State think that **providing animals with natural habitats, preserving the different types of animals and plants and conserving nature** is one of the most important benefits of forests and in 11 Member States, this is the most mentioned response.

VI. RECOGNITION OF QUALITY LABELS

Slightly more than six out of ten Europeans (63%) are aware of at least one logo, which is a trend that is unchanged since the survey in 2012. A third of Europeans *spontaneously* said they recognised "none" of the logos, which is two percentage points less than the result in the 2013 survey. The **Fairtrade** logo remains the most recognised logo (37%, no change from 2013, +1 percentage point since 2012), followed by the **Organic farming** logo in second place, which has experienced a decline since previous surveys (23%, -2 since 2013, -1 since 2012).

QC12 Which of the logos on this screen are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



In third place, with the largest increase in recognition since 2013, is the **Protected designation of origin** (20%, +7pp since 2013; +6pp, 2012) logo with one in five Europeans now recognising it, up seven percentage points from 2013, and up six points from 2012. The **Protected geographical indication** logo (17%, +3pp since 2013, +3pp 2012) and **Traditional specialty guaranteed** (15%, + 3pp since 2013) logos both had three point increases in the proportion of respondents that recognise them since the last survey in 2013.

In six Member States, over 80% of respondents are aware of at least one logo: Sweden (90%), Luxembourg (88%), Austria (88%), Ireland (86%), the United Kingdom (85%) and the Netherlands (84%).

CONCLUSION

The objectives of this Special Eurobarometer survey were to understand the relationship between Europeans and agriculture within the EU by exploring the level of importance they attach to agriculture, understanding their view of the role of the farmer and what they believe are the main objectives of the EU with regards to agriculture. Determining what Europeans know about the Common Agricultural Policy (CAP) and their views was also a key objective, as well assessing public opinion on the various forms of financial aid provided to farmers. European perception about the role forests play in society was also explored, and how well they recognise various quality logos and labels.

By analysing the results from this survey against previous Eurobarometer surveys (2007, 2009, 2012, 2013) we are able to track how public opinion has evolved over time.

Generally, Europeans show an increasing concern for agriculture and rural areas. Their views seem to be aligned with regards to what they consider the main responsibility for the farmer and the main objective for the EU; that is, supplying and ensuring products are of good quality, healthy and safe.

In this context, it is perhaps surprising that whilst a clear majority of EU citizens continue to agree the CAP benefits all citizens and not only farmers, support has declined considerably since 2013. Overall, Europeans have become more aware of the CAP since 2013, although very few claim to know the details.

Public opinion is generally positive in reference to whether the EU is fulfilling its role in securing and ensuring products are of good quality, healthy and safe. Whilst not the majority view, a considerable proportion of Europeans think that the EU is not fulfilling its role in providing a fair standard of living for farmers.

With this in mind, it is interesting to observe “strengthening the farmer’s role in the food chain” as one of the top two priorities for the CAP mentioned by Europeans as being important. The other key priority mentioned by Europeans in this survey is the need for investment into rural areas to stimulate economic growth and job creation.

In terms of the contribution of the CAP to the EU, the large majority of respondents believe that it improves trade relations between the EU and the rest of the world (66% agree) and helps with the smooth running of the EU single market (65% agree).

Europeans believe the reason the EU spends a considerable amount of its budget on the CAP is because by supporting the farmers with financial aid, they are able to guarantee a sustainable food supply for EU citizens. Increasingly so since the last survey in 2013, Europeans understand that in order to achieve this, agriculture requires heavy human and financial investment.

Perhaps as a result of this changing view, the majority would like to see EU support for farmers increase in time, however right now they are most likely to think it is “about right”. There is an increasing proportion of respondents since the last survey holding the view it is “too low”. Europeans are also generally supportive of the payments made to farmers for carrying out agricultural practices that are beneficial to the environment. They also think that it is justified for the EU to reduce subsidies if farmers do not respect food safety, animal welfare and environmental standards.

With regards to forests, Europeans believe they provide mainly environmental benefits such as absorbing carbon dioxide to fight climate change, conserving nature and providing natural animal habitats.

The most recognised logo continued to be the Fairtrade logo, however more Europeans recognised the Protected Designation of Origin logo compared to the last survey in 2013.

TECHNICAL SPECIFICATIONS

Between the 17th and the 26th of October 2015, TNS opinion & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the wave 84.2 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Strategy, Corporate Communication Actions and Eurobarometer" Unit.

The wave 84.2 includes the SPECIAL EUROBAROMETER 440 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	17/10/2015	26/10/2015	9.263.570	2,18%
BG	Bulgaria	TNS BBSS	1.021	17/10/2015	26/10/2015	6.294.563	1,48%
CZ	Czech Rep.	TNS Aisa	1.002	17/10/2015	26/10/2015	8.955.829	2,11%
DK	Denmark	TNS Gallup DK	1.036	17/10/2015	26/10/2015	4.625.032	1,09%
DE	Germany	TNS Infratest	1.585	17/10/2015	26/10/2015	71.283.580	16,79%
EE	Estonia	TNS Emor	1.000	17/10/2015	26/10/2015	1.113.355	0,26%
IE	Ireland	Behaviour & Attitudes	1.002	17/10/2015	26/10/2015	3.586.829	0,84%
EL	Greece	TNS ICAP	1.007	17/10/2015	26/10/2015	8.791.499	2,07%
ES	Spain	TNS Spain	1.015	17/10/2015	26/10/2015	39.506.853	9,31%
FR	France	TNS Sofres	1.028	17/10/2015	26/10/2015	51.668.700	12,17%
HR	Croatia	HENDAL	1.004	17/10/2015	26/10/2015	3.625.601	0,85%
IT	Italy	TNS Italia	1.015	17/10/2015	26/10/2015	51.336.889	12,09%
CY	Rep. Of Cyprus	CYMAR	501	17/10/2015	26/10/2015	724.084	0,17%
LV	Latvia	TNS Latvia	1.013	17/10/2015	26/10/2015	1.731.509	0,41%
LT	Lithuania	TNS LT	1.010	17/10/2015	26/10/2015	2.535.329	0,60%
LU	Luxembourg	TNS ILReS	505	17/10/2015	26/10/2015	445.806	0,11%
HU	Hungary	TNS Hoffmann	1.047	17/10/2015	26/10/2015	8.477.933	2,00%
MT	Malta	MISCO	501	17/10/2015	26/10/2015	360.045	0,08%
NL	Netherlands	TNS NIPO	1.044	17/10/2015	26/10/2015	13.901.653	3,27%
AT	Austria	ipr Umfrageforschung	1.009	17/10/2015	26/10/2015	7.232.497	1,70%
PL	Poland	TNS Polska	1.002	17/10/2015	26/10/2015	32.736.685	7,71%
PT	Portugal	TNS Portugal	1.051	17/10/2015	26/10/2015	8.512.269	2,01%
RO	Romania	TNS CSOP	1.017	17/10/2015	26/10/2015	16.880.465	3,98%
SI	Slovenia	RM PLUS	1.000	17/10/2015	26/10/2015	1.760.726	0,41%
SK	Slovakia	TNS Slovakia	1.028	17/10/2015	26/10/2015	4.580.260	1,08%
FI	Finland	TNS Gallup Oy	1.011	17/10/2015	26/10/2015	4.511.446	1,06%
SE	Sweden	TNS Sifo	1.041	17/10/2015	26/10/2015	7.944.034	1,87%
UK	United Kingdom	TNS UK	1.326	17/10/2015	26/10/2015	52.104.731	12,27%
		TOTAL EU28	27.822	17/10/15	26/10/15	424.491.772	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 II[1] (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 <u>estimations</u>, 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:

<u>Statistical Margins due to the sampling process</u>

(at the 95% level of confidence)

various sample sizes are in rows — *various observed results are in columns*

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 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% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

[1] Figures updated in August 2015