

YouGov Plc Consumer Survey

Consumer Understanding of the Global Food Challenge

KEY FINDINGS

A consumer survey fielded in April 2016 by YouGov Plc has shed light on European adults' understanding the realities of food production. In an effort to discover levels of awareness about public knowledge of agriculture and food production, the European Crop Protection Association commissioned the four-country survey.

Overall, results show that the severity of the global food challenge and the link between productivity and food prices are underestimated by the EU public.

Methodology: Total sample size was 5631 adults. Fieldwork was undertaken between 1st - 5th April 2016. The survey was carried out online. The figures have been weighted and are representative of all adults (aged 18+) in each country.

KEY FINDINGS:

The Global Food Supply

- European consumers in the UK, Germany, Spain and Poland tend to misunderstand the realities of food production and do not appreciate the potential magnitude of the world's food supply problem.
- Only 4% of European adults surveyed correctly estimated that food production must increase by 60% by 2050 to meet the demand of the growing population, according to FAO figures.
- 61% underestimate the amount by which, according to FAO figures, world food production must increase by 2050.¹
- Young adults are twice as likely to correctly estimate the magnitude of the food supply problem as their elders. Across Europe, 7% of adults age 18-24 correctly estimated the amount by

¹ To meet the food demand of the growing global population, the Food & Agriculture Organization of the United Nations (FAO) estimates that world food production must increase by 60% by 2050. *Source:* Alexandratos, N. and J. Bruinsma. 2012. World agriculture towards 2030/2050: the 2012 revision. ESA Working paper No. 12-03. Rome, FAO.

which world food production must increase; only 3% of adults 35-54, for example, were able to name the correct percentage.

Knowledge about the Role of Pesticides

- 70% of respondents think that in general, thanks to farming solutions including pesticides, Europeans enjoy a safe and plentiful supply of fresh fruits and vegetables all year round (i.e. reliable quality, stable amounts on store shelves).
- Only 57% of adults surveyed in Europe agree that without the use of pesticides, more than half of the world's crops could be lost each year due to plant pests and diseases.

Pesticides' Role in Productivity and the Link to Food Cost

- Only 31% of adults surveyed in Europe think that farmers' inability to protect their crops against diseases and crop infestation is a factor directly linked to the cost of the world's food supply.
- Most respondents understand that access to food is linked to price, with 91% agreeing that the price of produce must remain affordable to ensure households have access to healthy, fresh food, but just over half (54%) of adults surveyed think that to keep food affordable farmers should be able to tackle weeds, pests and disease with pesticides.
- 50% underestimate the extent to which global crop yields are lost due to plant pests and diseases each year. According to European Parliament reports, 40% of global crop yields are lost to pests and diseases every year.²
- When asked to choose from a list of 8 factors that they think will increase the cost of the world's food supply, consumers are more likely to name macro factors such as population growth (44%) and the effects of climate change (50%) rather than locally-manageable factors, such as a farmers' inability to protect their crops against diseases and crop infestation (31%).

² European Union, European Parliament. (2015), Draft Report on Technological solutions to sustainable agriculture in the EU (2015/2225(INI))

Country-level highlights:

- In **Poland** nearly one-third (30%) of adults misunderstand the purpose of pesticides, disagreeing with the fact that they are designed to protect plants from damaging influences including harmful bugs, invasive weeds, parasites and fungi. 13% of **UK** adults disagree with this statement.
- When asked what percentage of global crop yields they think are currently lost to plant pests and diseases each year, only 12% of **UK** respondents correctly identify the correct figure. According to European Parliament reports, 40% of global crop yields are lost to pests and diseases every year.³
- 46% of adults in **Germany** think that farmers should be able to tackle weeds, pests and disease with pesticides to keep our food affordable.
- When asked to what extent a limited supply of arable land is a concern for the future of the world's food supply, **Spanish** respondents show the highest level of agreement, with 81% of respondents registering agreement with the fact.
- **Spanish** respondents also seem to be the most price-aware of the countries surveyed, with 94% of respondents agreeing that to ensure households have access to healthy, fresh food choices, the price of produce must remain affordable.

Download infographics here: www.ecpa.eu/with-or-without/

The European Crop Protection Association (ECPA) represents the crop protection industry interests at European level. Its members include all major companies and national associations across Europe.

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³ European Union, European Parliament. (2015), Draft Report on Technological solutions to sustainable agriculture in the EU (2015/2225(INI))