

True Price Consumer Research Survey Results Germany, France, the Netherlands

Attachment – tables

3rd November 2020

Appendix

| | | | | | |
|--|------------------|--------------------|------------------------|-------------------|--|
| Q2_1: Do you support the full range of measures in the proposal? | | | | | |
| | Total (A) | Germany (B) | Netherlands (D) | France (C) | |
| Total | N=1558 | N=514 | N=513 | N=531 | |
| Totally disagree | 4% | 5% | 5% | 2% | |
| Disagree | 8% | 5% | 11% | 7% | |
| Neutral | 34% | 34% | 34% | 34% | |
| Agree | 39% | 42% | 31% | 43% | |
| Totally agree | 16% | 15% | 18% | 14% | |
| q2: To what extent you agree with each of the measures in the proposal? Lower prices for fruit, vegetables, potatoes, and meat substitutes: | | | | | |
| | Total (A) | Germany (B) | Netherlands (D) | France (C) | |
| Total | N=1558 | N=514 | N=513 | N=531 | |
| Totally disagree | 2% | 2% | 2% | 1% | |
| Disagree | 6% | 9% | 2% | 6% | |
| Neutral | 17% | 23% | 16% | 12% | |
| Agree | 36% | 39% | 25% | 44% | |
| Totally agree | 39% | 27% | 54% | 37% | |
| q2: To what extent you agree with each of the measures in the proposal? Lower prices for sustainably certified products (eg, organic, fair trade): | | | | | |
| | Total (A) | Germany (B) | Netherlands (D) | France (C) | |
| Total | N=1558 | N=514 | N=513 | N=531 | |
| Totally disagree | 2% | 4% | 2% | 1% | |
| Disagree | 7% | 12% | 5% | 5% | |
| Neutral | 24% | 27% | 26% | 17% | |
| Agree | 35% | 33% | 31% | 40% | |
| Totally agree | 32% | 24% | 35% | 36% | |
| q2: To what extent you agree with each of the measures in the proposal? Financial compensation for 10-20% of the population with the lowest income: | | | | | |
| | Total (A) | Germany (B) | Netherlands (D) | France (C) | |
| Total | N=1558 | N=514 | N=513 | N=531 | |
| Totally disagree | 4% | 4% | 4% | 3% | |
| Disagree | 7% | 7% | 6% | 7% | |
| Neutral | 24% | 26% | 24% | 23% | |
| Agree | 36% | 41% | 29% | 37% | |
| Totally agree | 30% | 23% | 37% | 30% | |
| q2: To what extent you agree with each of the measures in the proposal? Raising the price of meat by implementing a "fair meat price": | | | | | |
| | Total (A) | Germany (B) | Netherlands (D) | France (C) | |
| Total | N=1558 | N=514 | N=513 | N=531 | |
| Totally disagree | 10% | 6% | 13% | 11% | |
| Disagree | 15% | 12% | 13% | 18% | |
| Neutral | 25% | 22% | 26% | 25% | |
| Agree | 33% | 37% | 27% | 33% | |
| Totally agree | 18% | 22% | 20% | 12% | |

| q2: To what extent you agree with each of the measures in the proposal? Better financial outlook for European farmers: | | | | |
|--|-----------|-------------|-----------------|------------|
| | Total (A) | Germany (B) | Netherlands (D) | France (C) |
| Total | N=1558 | N=514 | N=513 | N=531 |
| Totally disagree | 2% | 1% | 2% | 2% |
| Disagree | 4% | 5% | 4% | 4% |
| Neutral | 26% | 28% | 29% | 19% |
| Agree | 43% | 43% | 38% | 47% |
| Totally agree | 26% | 23% | 27% | 28% |

| q2: To what extent you agree with each of the measures in the proposal? A win for the climate, environment and nature at farms (eg. by reducing CO2 emissions): | | | | |
|---|---------------------|----------------------|--------------------------|---------------------|
| | Total (A) N=1558 | Germany (B) N=514 | Netherlands (D) N=513 | France (C) N=531 |
| Totally disagree | 3% | 2% | 4% | 2% |
| Disagree | 3% | 4% | 4% | 1% |
| Neutral | 24% | 22% | 29% | 21% |
| Agree | 38% | 42% | 31% | 42% |
| Totally agree | 32% | 30% | 32% | 34% |

| Q2_4: The following questions focuses on the implementation of a “fair meat price”. We are curious about your opinion on the following statements: “The environmental and health impact of meat, costs for animal welfare and a decent living for workers have to be incorporated in the cost, even if this results in an increase in the price of meat.” | | | | |
|---|---------------------|----------------------|--------------------------|---------------------|
| | Total (A) N=1558 | Germany (B) N=514 | Netherlands (D) N=513 | France (C) N=531 |
| Total | | | | |
| Totally disagree | 6% | 4% | 8% | 6% |
| Disagree | 11% | 9% | 9% | 17% |
| Neutral | 28% | 23% | 33% | 27% |
| Agree | 37% | 39% | 35% | 38% |
| Totally agree | 17% | 25% | 16% | 12% |


q22: Point of View on the Relationship Between Consumption, Health and Food Prices The risk of cardiovascular disease, diabetes 2, overweight and some cancers are increased in a diet with the average meat consumption in the EU (especially with processed and red meat). Did you know that on average in the EU and in 19 EU Member States, meat consumption is double to the amounts advised in dietary guidelines for health? And that this is one of the reasons that health costs in the EU are increasing so much, that the World Bank advised governments last February 2020 to introduce taxes on meat and other unhealthy products if eaten too much?

| | Total (A) | Germany (B) | Netherlands (D) | France (C) |
|--------------|-----------|-------------|-----------------|------------|
| Total | N=1558 | N=514 | N=513 | N=531 |
| Yes | 55% | 58% | 43% | 64% |
| No | 45% | 42% | 57% | 36% |

q9: Would you be willing to eat less meat if you were financially rewarded for this?

| | Total (A) | Germany (B) | Netherlands (D) | France (C) |
|--------------|-----------|-------------|-----------------|------------|
| Total | N=1558 | N=514 | N=513 | N=531 |
| Yes | 47% | 48% | 45% | 49% |
| Maybe | 34% | 34% | 34% | 33% |
| No | 19% | 18% | 22% | 18% |

q11: We are curious about your opinion on the following statement: "All the profit made in supermarkets via a higher price on meat (25-35% more expensive) is returned by the supermarket to consumers by charging a lower price (25-35% cheaper) for fruit, vegetables and other healthy / sustainable foods. The price of the average shopping basket remains the same and the supermarket does neither benefit from it financially nor loses money."

| |  (A) | Germany (B) | Netherlands (D) | France (C) |
|------------------|---|-------------|-----------------|------------|
| Total | N=1558 | N=514 | N=513 | N=531 |
| Totally disagree | 6% | 5% | 8% | 7% |
| Disagree | 9% | 9% | 9% | 9% |
| Neutral | 34% | 35% | 36% | 33% |
| Agree | 32% | 34% | 25% | 37% |
| Totally agree | 18% | 17% | 23% | 14% |

q12: In addition to fruit, vegetables, potatoes, nuts, mushrooms, and meat substitutes, which products should also fall into the lowest VAT category?

| | Total (A) | Germany (B) | Netherlands (D) | France (C) |
|---|-----------|-------------|-----------------|------------|
| Total | N=1558 | N=514 | N=513 | N=531 |
| All food products that are sustainably certified | 47% | 52% | 37% | 52% |
| Wholewheat products such as bread, grains, | 52% | 53% | 57% | 45% |
| Dairy substitutes (e.g., soy milk, almond milk) | 26% | 28% | 27% | 23% |
| Oils and fats (e.g., olive oil, margarine) | 26% | 24% | 24% | 31% |
| Healthier drinks (e.g., coffee, tea, pure fruit) | 42% | 38% | 46% | 43% |
| Organic beer and wine | 15% | 15% | 12% | 18% |
| Vegetarian meals with more than 75 gram vegetable | 23% | 18% | 28% | 22% |
| Vegetarian products (e.g., hummus, pure chicken) | 23% | 21% | 28% | 22% |
| None / I don't care | 14% | 13% | 15% | 15% |
| Other: | 2% | 2% | 3% | 0% |
| Count | 2.7 | 2.63 | 2.78 | 2.71 |

q13: Recently, the German Agriculture Minister Julia Klöckner proposed an animal welfare tax on meat which enables farmers to improve animal welfare. It would also improve environmental standards (CO2-reduction) and enables workers in slaughterhouses and farms to have a better income. Would you agree with this proposal in your country or at EU level if the tax would be:

| | Total (A) | Germany (B) | Netherlands (D) | France (C) |
|--|-----------|-------------|-----------------|------------|
| Total | N=1558 | N=514 | N=513 | N=531 |
| 10 eurocents per 100 gram of meat | 29% | 28% | 30% | 29% |
| 25 eurocents per 100 gram of meat | 22% | 31% | 18% | 19% |
| 50 eurocents per 100 gram of meat | 11% | 13% | 7% | 12% |
| More than 50 eurocents per 100 gram of meat | 8% | 9% | 7% | 8% |
| This proposal should not be implemented / I don't know | 30% | 20% | 37% | 33% |

q14: Do you support the animal welfare tax on meat proposed by Julia Klöckner last June to raise financial support for farmers to increase animal welfare (this was 4 cents per 100 gram meat)?

| | Total (A) | Germany (B) | Netherlands (D) | France (C) |
|--------------|-----------|-------------|-----------------|------------|
| Total | N=1558 | N=514 | N=513 | N=531 |
| Yes | 68% | 70% | 64% | 70% |
| No | 32% | 30% | 36% | 30% |

| | | | | | | | | | |
|---|------------------|--|--------------------|--|------------------------|--|-------------------|--|--|
| q15: Would you also support a higher price for meat if you would also pay for the price of CO2 reduction and for higher salaries for farmers and workers in slaughterhouses? | | | | | | | | | |
| | | | | | | | | | |
| | Total (A) | | Germany (B) | | Netherlands (D) | | France (C) | | |
| Total | N=1558 | | N=514 | | N=513 | | N=531 | | |
| Yes | 64% | | 74% | | 50% | | 69% | | |
| No | 36% | | 26% | | 50% | | 31% | | |
| q16: How much cents per 100 gram would you be willing to pay to reduce the CO2 emissions and for higher salaries for farmers and workers in slaughterhouses? | | | | | | | | | |
| | | | | | | | | | |
| | Total (A) | | Germany (B) | | Netherlands (D) | | France (C) | | |
| Total | N=999 | | N=378 | | N=257 | | N=364 | | |
| Less than 20 cents per 100 gram meat | 38% | | 28% | | 44% | | 45% | | |
| 20 cents per 100 gram meat | 41% | | 48% | | 37% | | 38% | | |
| 40 cents per 100 gram meat | 10% | | 11% | | 9% | | 9% | | |
| More than 40 cents per gram meat | 10% | | 13% | | 9% | | 8% | | |
| q17: The EU Commission proposed taxes at products imported to the EU if CO2-standards are lower compared to the EU. Would you support import taxes on meat from countries with low standards for greenhouse gas emissions, or without environmental taxes on meat? For instance, meat from South America, linked to deforestation, or meat from the USA or Asian countries? | | | | | | | | | |
| | | | | | | | | | |
| | Total (A) | | Germany (B) | | Netherlands (D) | | France (C) | | |
| Total | N=1558 | | N=514 | | N=513 | | N=531 | | |
| Yes | 65% | | 67% | | 54% | | 72% | | |
| No | 35% | | 33% | | 46% | | 28% | | |
| q18: Would you support a decision from the EU Commission to have zero VAT tariffs for all European (organic) fruits and vegetables, potatoes and other plant based protein products, and a shift of meat products and unhealthy sugary drinks from the reduced VAT tariff to the normal 'high' VAT tariff? | | | | | | | | | |
| | | | | | | | | | |
| | Total (A) | | Germany (B) | | Netherlands (D) | | France (C) | | |
| Total | N=1558 | | N=514 | | N=513 | | N=531 | | |
| Yes | 70% | | 72% | | 64% | | 75% | | |
| No | 30% | | 28% | | 36% | | 25% | | |

| | |
|---|------------------|
| q30: Which political party will you probably vote for during next national or European elections? | |
| | |
| | |
| | Total (A) |
| Total | N=514 |
| Christlich Demokratische Union Deutschland (CDU) | 18% |
| Sozialdemokratische Partei Deutschlands (SPD) | 14% |
| BÜNDNIS 90/DIE GRÜNEN (GRÜNE) | 19% |
| DIE LINKE. (DIE LINKE) | 11% |
| Alternative für Deutschland (AfD) | 11% |
| Christlich Soziale Union in Bayern (CSU) | 7% |
| Freie Demokratische Partei/Demokratische Volkspartei Deutschland (FDP) | 8% |
| Bundesvereinigung FREIE WÄHLER (FREIE WÄHLER) | 1% |
| Piratenpartei Deutschland (PIRATEN) | 2% |
| Partei Mensch Umwelt Tierschutz (Tierschutzpartei) | 3% |
| Nationaldemokratische Partei Deutschlands (NPD) | 1% |
| Weiß ich (noch) nicht / Möchte ich nicht beantworten | 0% |
| Eine Andere, nämlich: | 5% |
| | |
| | Total (A) |
| Total | N=531 |
| Rassemblement national | 17% |
| Les Républicains | 15% |
| La République en marche | 17% |
| Mouvement démocrate | 3% |
| Europe Écologie Les Verts | 10% |
| La France insoumise | 8% |
| Parti socialiste | 14% |
| Parti communiste français | 2% |
| Autres: | 14% |

| | Total (A) |
|---|-----------|
| Total | N=513 |
| 50PLUS | 5% |
| Christen-Democratisch Appèl (CDA) | 6% |
| ChristenUnie (CU) | 2% |
| Democraten 66 (D66) | 4% |
| DENK | 1% |
| Forum voor Democratie (FvD) | 5% |
| GroenLinks (GL) | 9% |
| Partij van de Arbeid (PvdA) | 9% |
| Partij voor de Dieren (PvdD) | 5% |
| Partij voor de Vrijheid (PVV) | 15% |
| Socialistische Partij (SP) | 12% |
| Staatkundig Gereformeerde Partij (SGP) | 1% |
| Volkspartij voor Vrijheid en Democratie (VVD) | 15% |
| Anders, namelijk: | 11% |

| | | | | | | | |
|-------------------------------------|------------------|--|--------------------|--|------------------------|--|-------------------|
| QSCR01: What is your gender? | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Total (A) | | Germany (B) | | Netherlands (D) | | France (C) |
| Total | N=1558 | | N=514 | | N=513 | | N=531 |
| Male | 49% | | 49% | | 49% | | 48% |
| Female | 51% | | 51% | | 51% | | 52% |
| Other | 0% | | 0% | | 0% | | 0% |

| | | | | | | | |
|--------------------------|------------------|--|--------------------|--|------------------------|--|-------------------|
| QSCRAG: Age Group | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Total (A) | | Germany (B) | | Netherlands (D) | | France (C) |
| Total | N=1558 | | N=514 | | N=513 | | N=531 |
| 18-34 | 26% | | 26% | | 26% | | 25% |
| 35-49 | 24% | | 22% | | 26% | | 25% |
| 50-65 | 27% | | 27% | | 27% | | 26% |
| 65+ | 23% | | 25% | | 20% | | 24% |