



THE AGRICULTURAL DISCONNECT

GLOBAL RESEARCH REPORT



Methodology

WHO Informed Publics (college educated, high income, media-engaged)

WHEN Data Collection Occurred
July 2–31, 2013

HOW Online Survey (Telephone Survey in Kenya)



US	n=1000
Brazil	n=500
Argentina	n=500
France	n=500
Switzerland	n=251
South Africa	n=500
UK	n=500
Germany	n=500
India	n=1000
Kenya	n=508
Russia	n=500
China	n=1000
Indonesia	n=500

Key findings

There is consensus that the need to produce more food for a growing global population in an environmentally sustainable way will be an important challenge in the next decade. However, there are conflicting opinions about how best to address this challenge, and about the likely impact of increased production on the environment and on the people who grow the food and work on the farms.

Responsibility

There is a belief that farming today is not conducted responsibly. There is a preference for local, organic and urban farming, but a recognition that governments and large scale farming have the greatest potential to address the global challenge of food security.

Technology

Respondents are open to using technology in a general sense to meet the need to grow more food but want specifically to minimize the use of pesticides, fertilizers and genetically modified seeds.

Environment

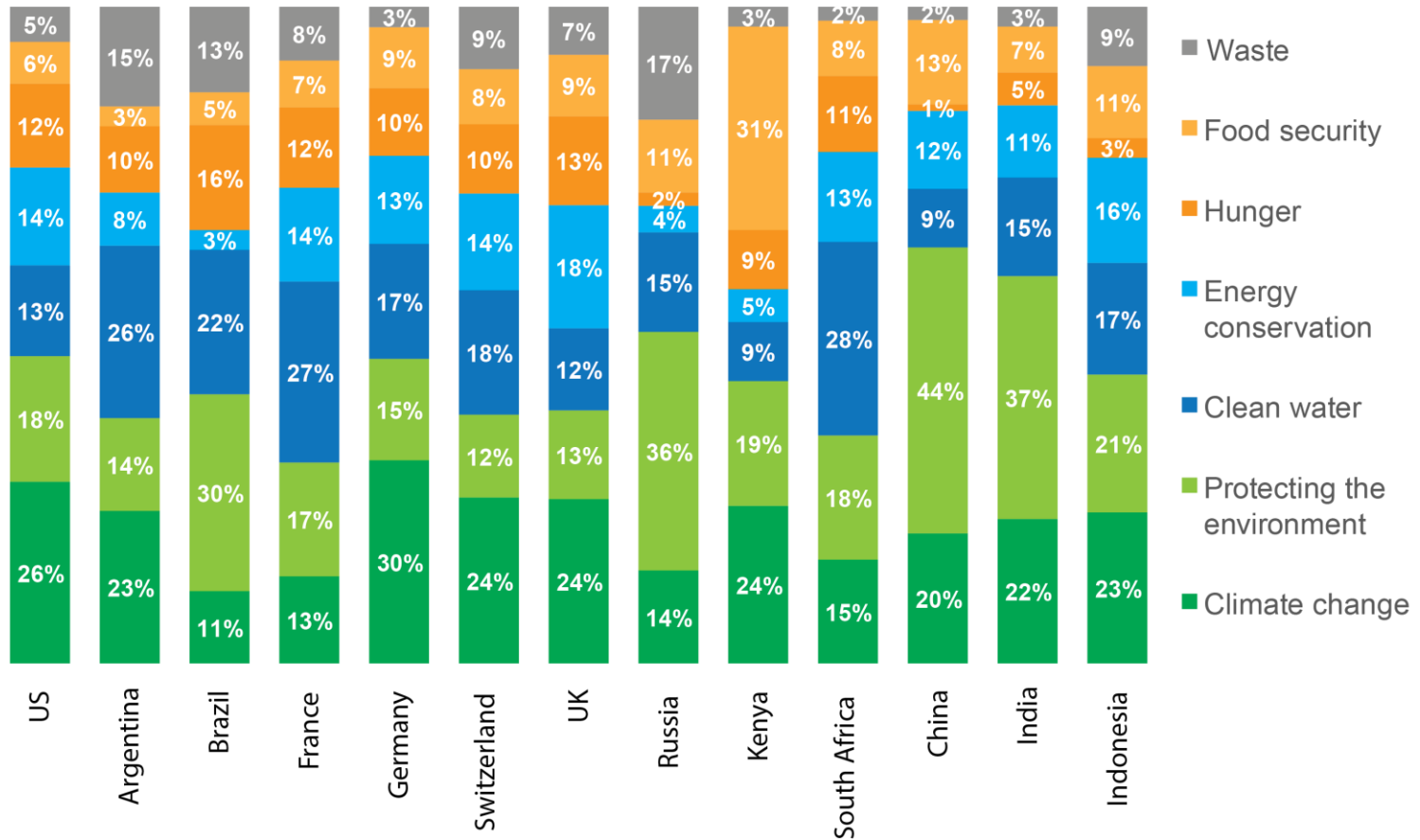
There are very mixed and uncertain views about the environmental impact of increased food production. There is a belief that more water and land should be used but a limited understanding of the consequences of doing so.

People

Most respondents believe that more human labor should be used in agriculture to produce more food and that increased production will have a positive impact on rural communities.

The challenges for the next ten years

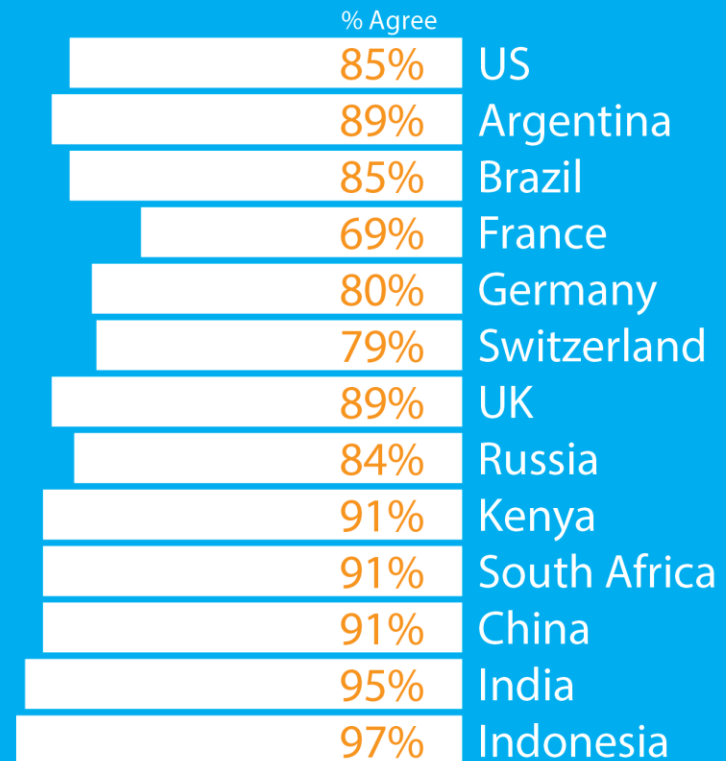
Top Global Health/Environment Concerns



Thinking about various global health and environmental issues, which one of the following do you believe is the most critical issue to address in the next 10 years?

The challenge of increased food production

“Producing more food for a growing population will be one of the next decade’s most important global challenges.”



Currently, there are over 7 billion people in the world. The world population is expected to reach 9 billion by the year 2050. Knowing this, how much do you agree or disagree with the following statement?: “Producing more food for a growing population will be one of the next decade’s most important global challenges.”

RESPONSIBILITY

Ensuring food security – whose responsibility?

Who's Responsible for Ensuring Adequate Food Supply?

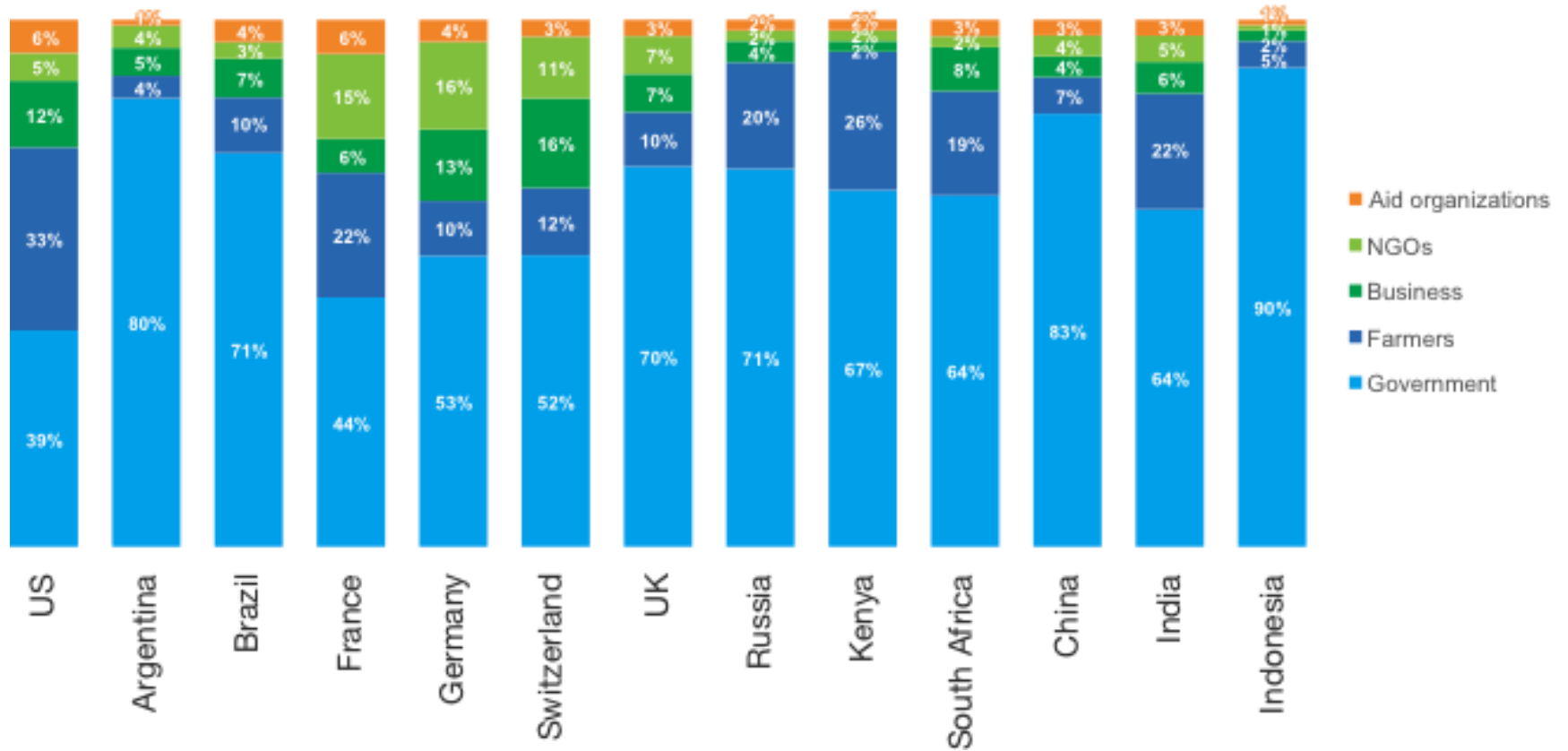


SHARED WITH BOTH DEVELOPED NATIONS & DEVELOPING NATIONS

US	80%
Brazil	84%
Argentina	83%
France	80%
Switzerland	75%
South Africa	86%
UK	80%
Germany	78%
India	61%
Kenya	74%
Russia	73%
China	65%
Indonesia	91%

Do you believe that the responsibility lies with these groups in developing nations, developed nations, or is the responsibility shared?

Ensuring food security – most people believe governments have the largest role

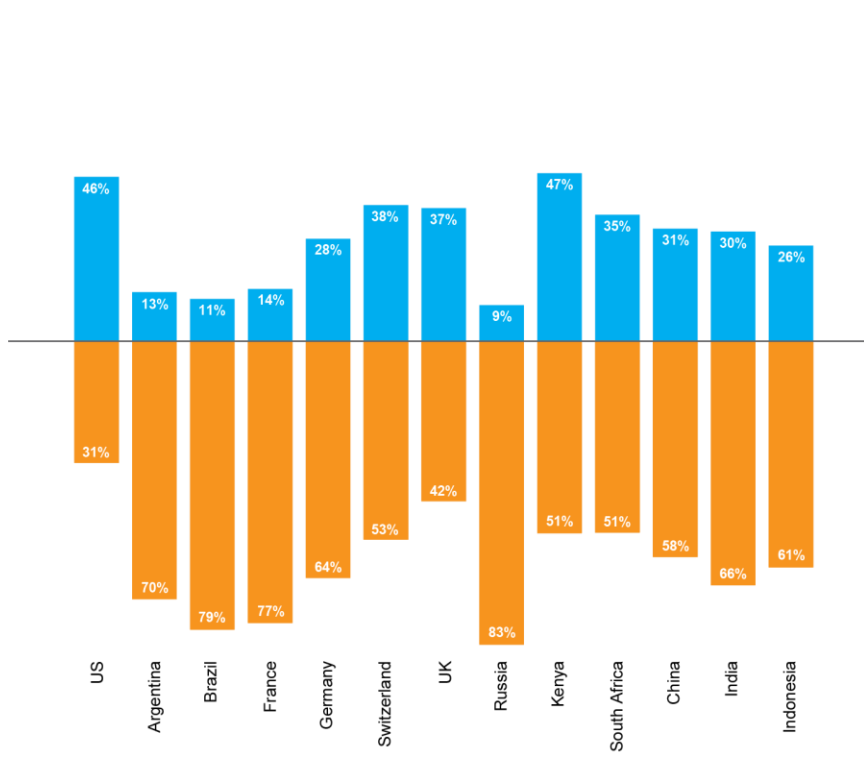


Who do you think should have the largest role in ensuring the growing population has access to an adequate food supply?

Respondents believe farming today is not performed responsibly – and expectations on sustainability are high

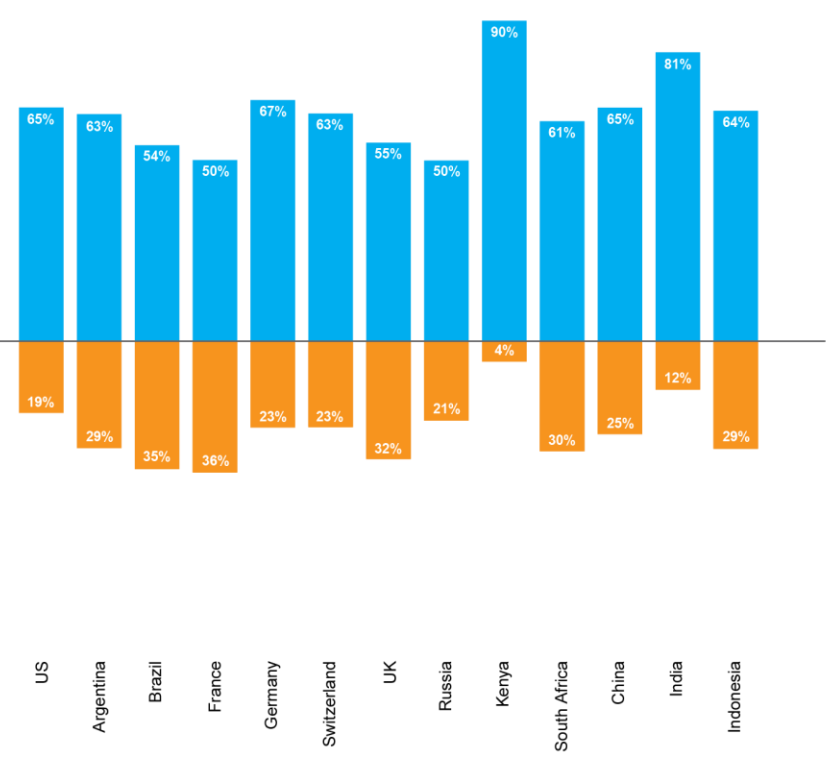
Is farming today performed in a responsible way?

■ Yes ■ No



As productivity increases will it be more or less sustainable?

■ More Sustainable ■ Less Sustainable

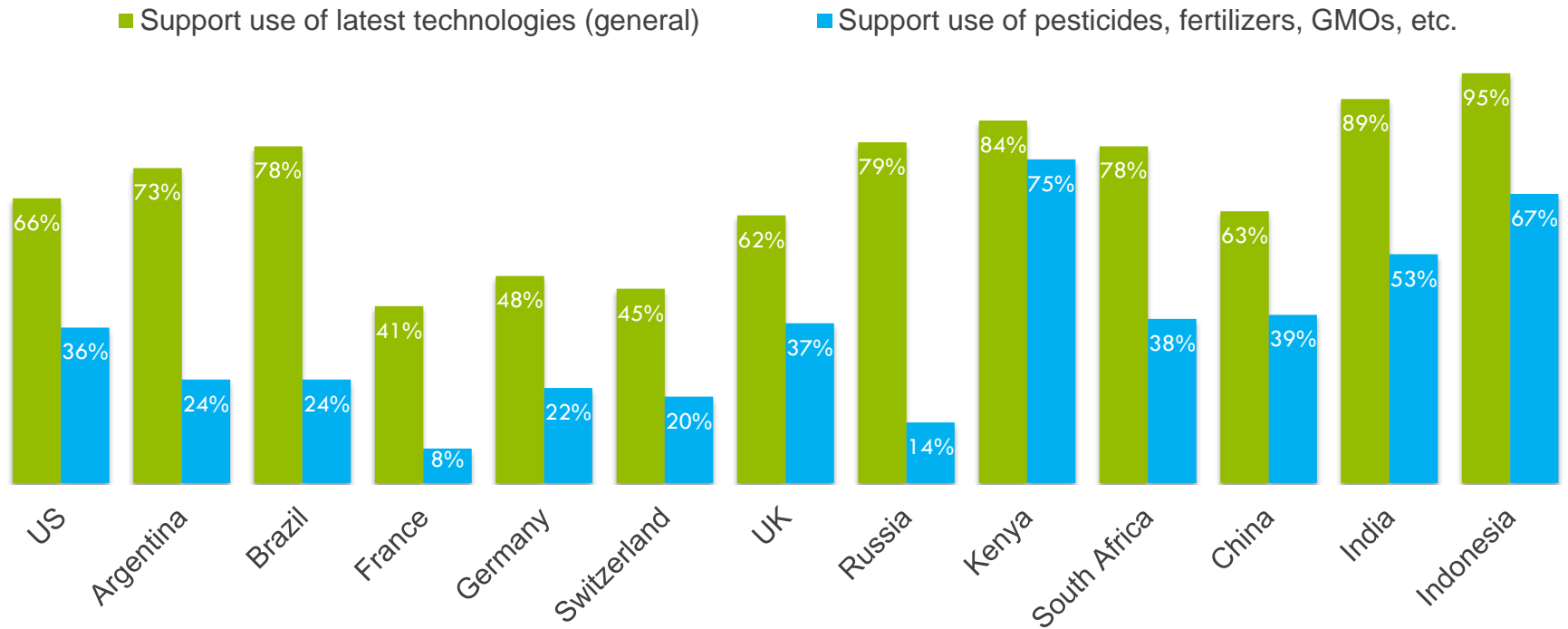


Do you believe that farming today is performed in a responsible way?

As more food needs to be produced by the world's farmers, do you believe they will be able to do so in a more sustainable way, less sustainable way, or will production increases have no impact on sustainability?

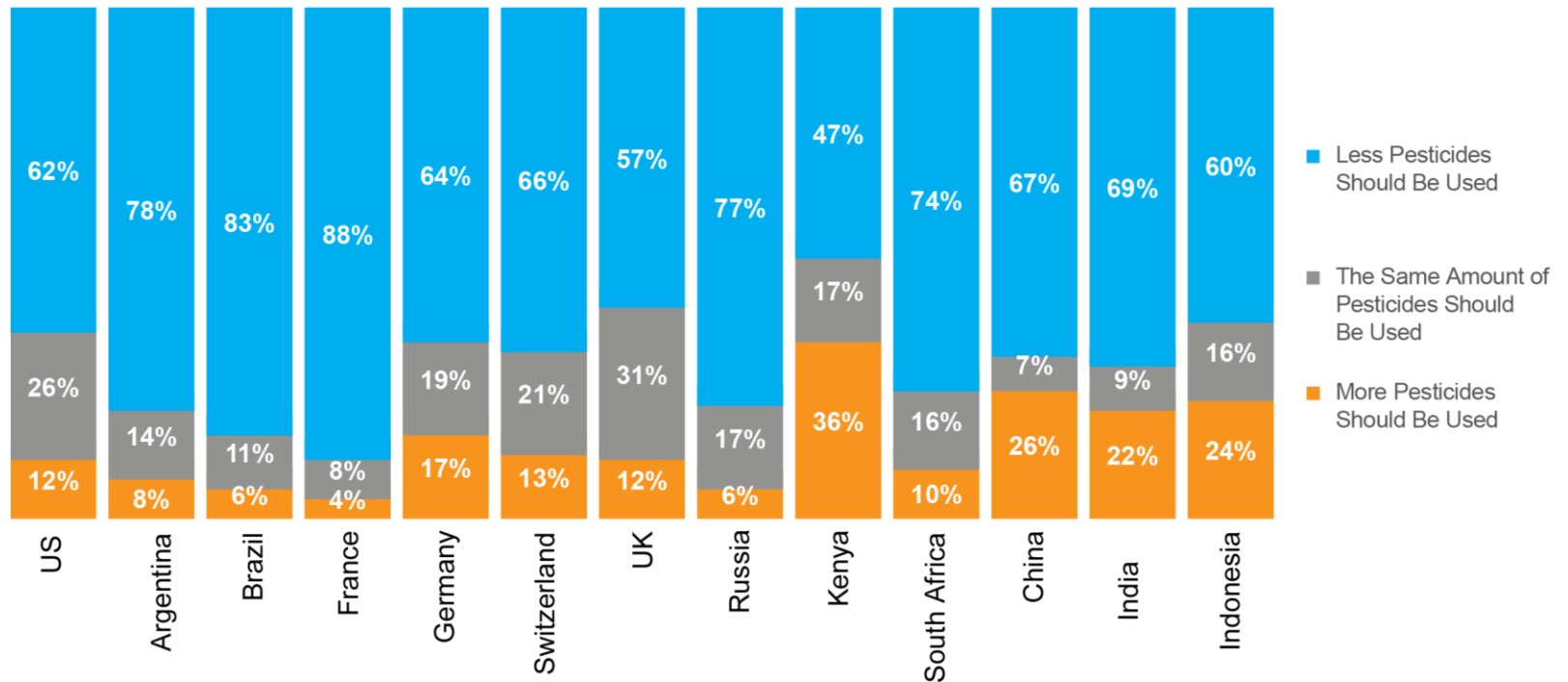
TECHNOLOGY

Technology *in general* accepted but concerns about specific products



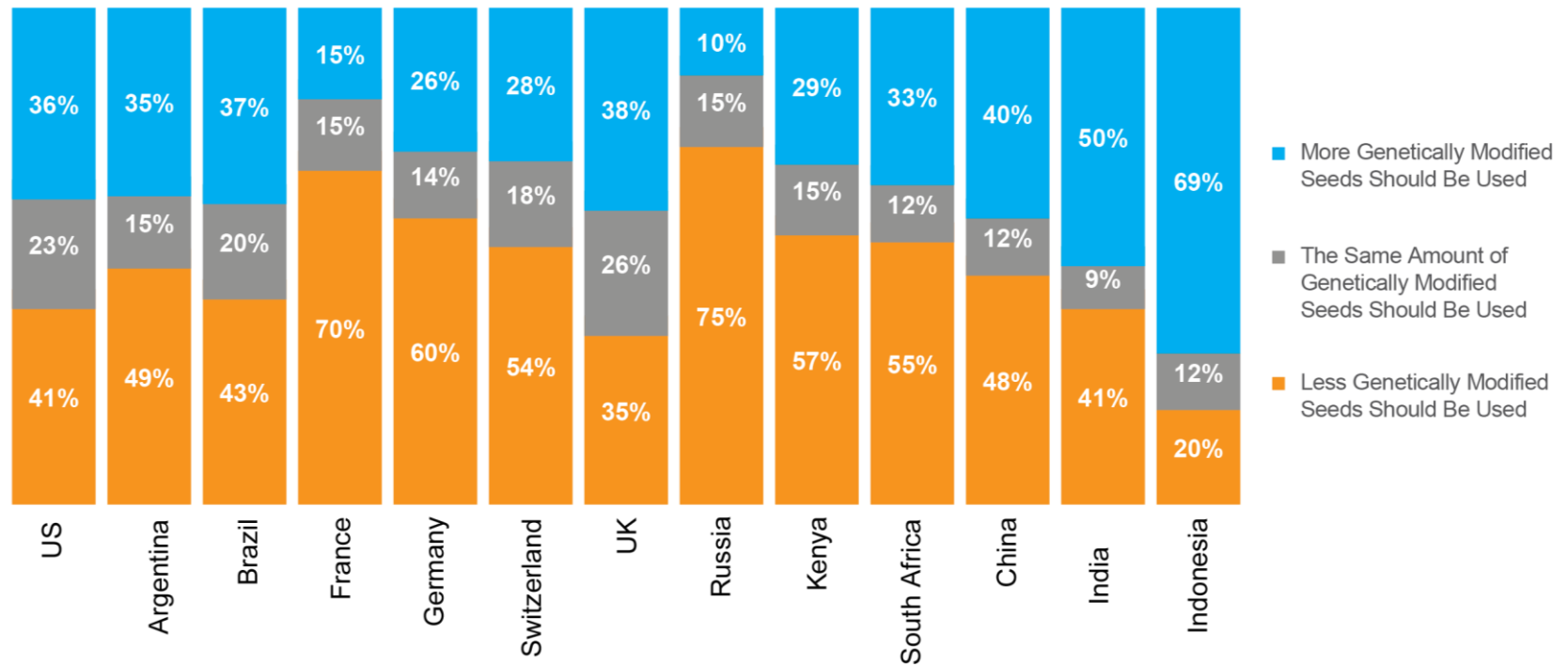
Do you believe that pesticides, fertilizers, genetically modified seeds, along with other technologies in development, should all be used to meet this growing need for food globally?

Majority believe fewer pesticides should be used



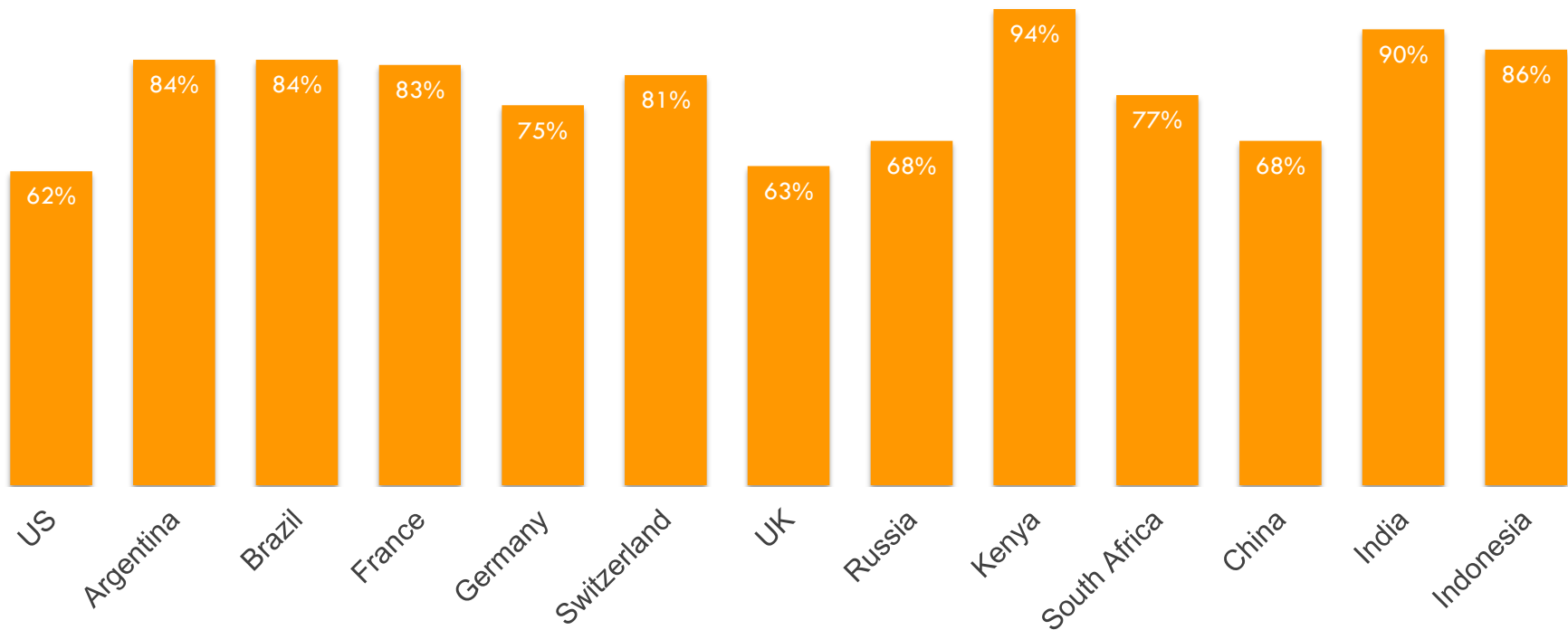
Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Pesticides

More mixed views on GM seeds



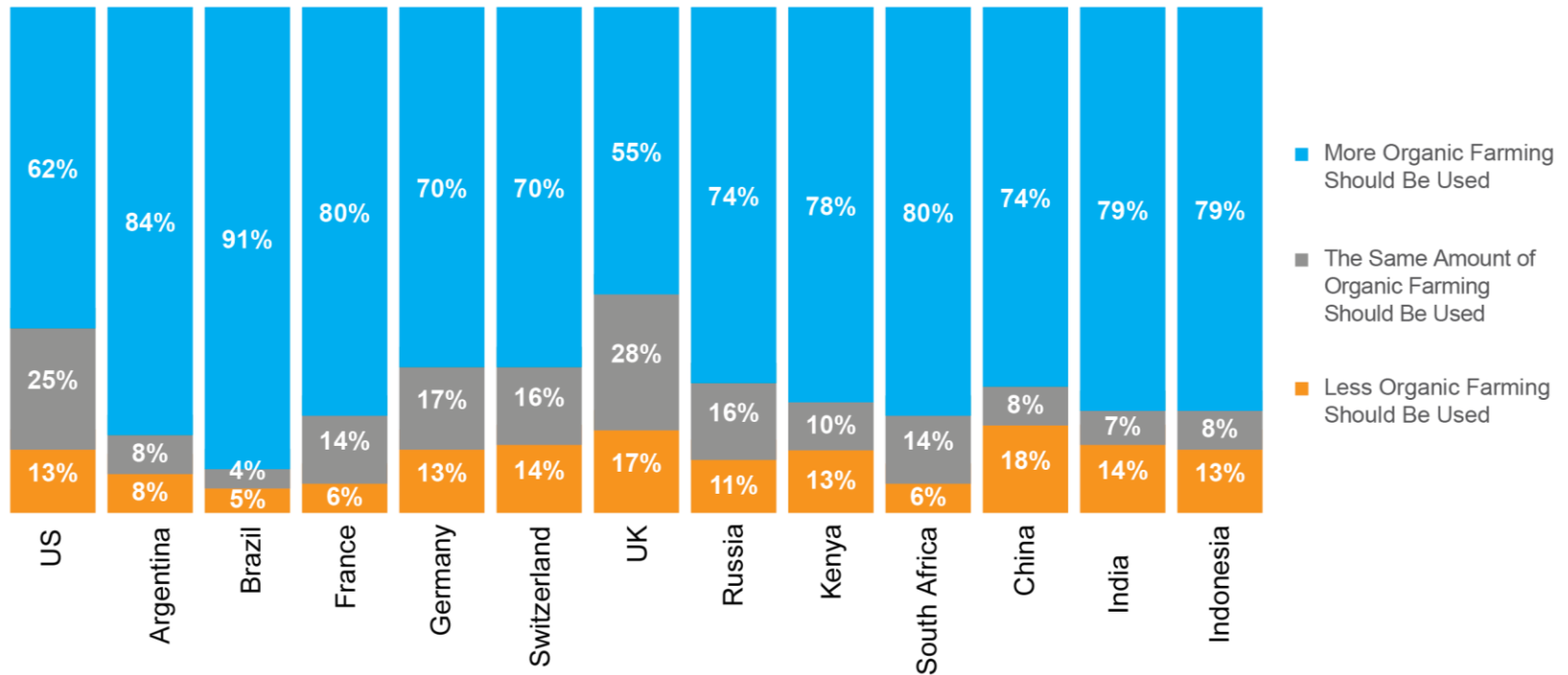
Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Genetically Modified Seeds

Organic/ local/ urban farming preferred



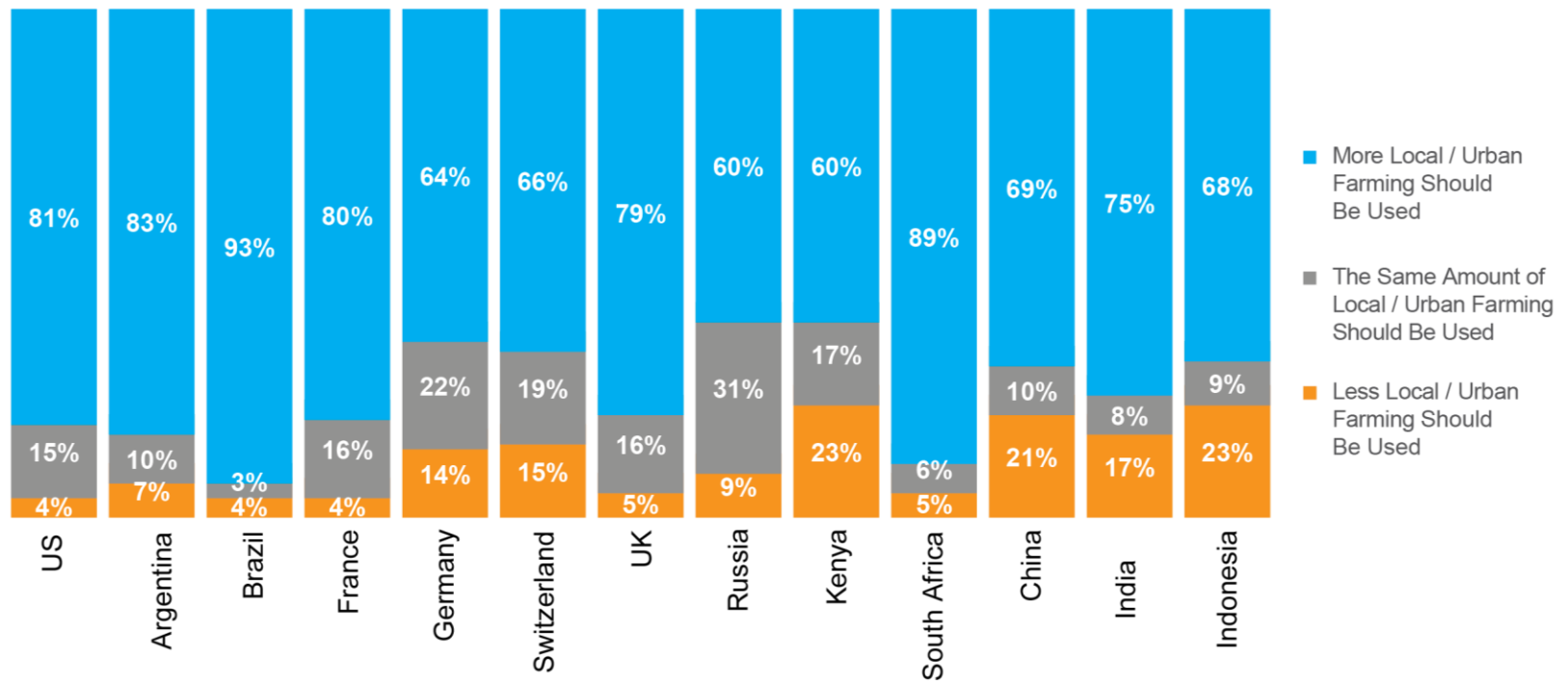
Do you believe that priority should be given to organic, local and/or urban farming practices over higher production methods utilizing new technologies to feed the growing population?

Organic farming viewed particularly favorably



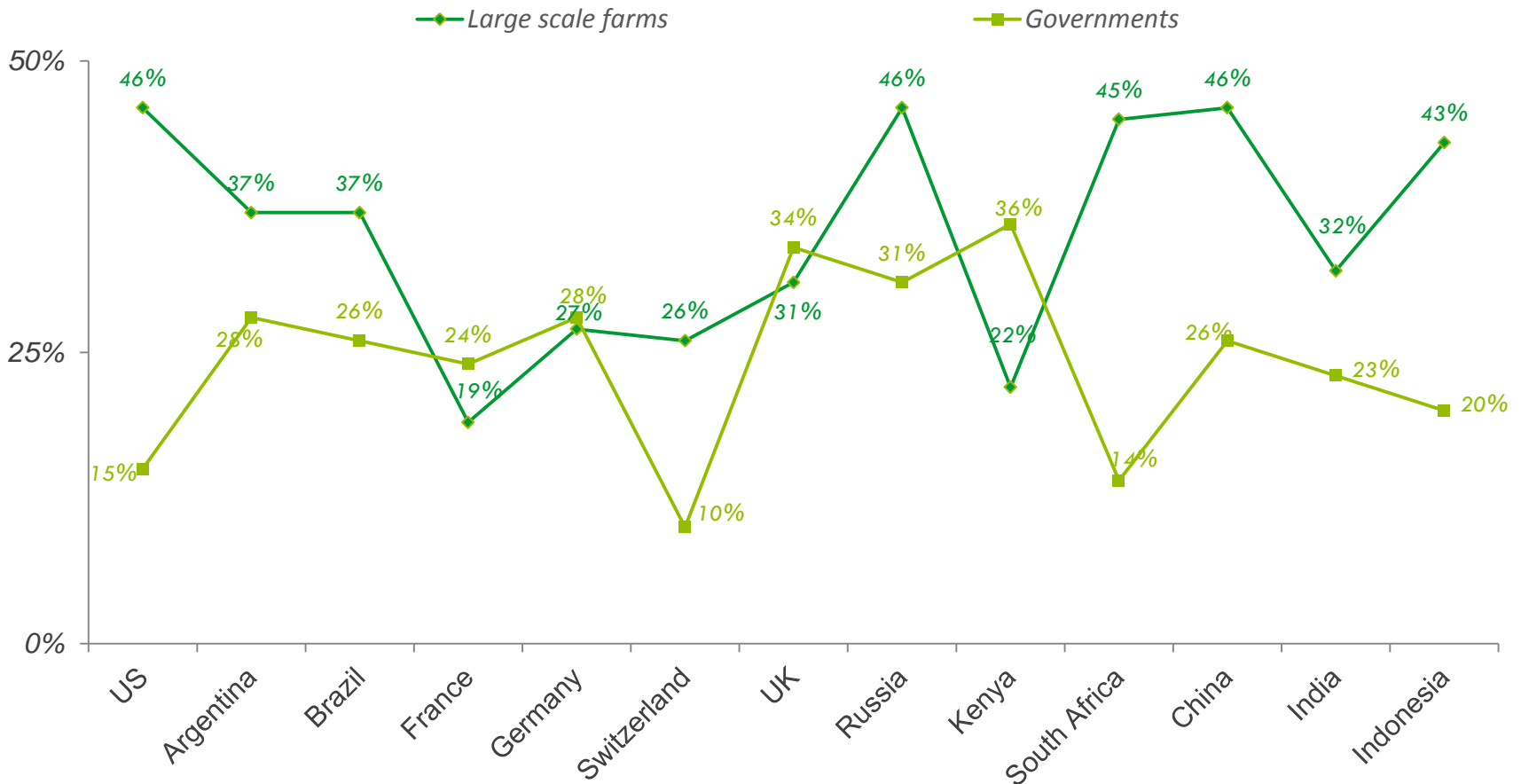
Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Organic Farming

Local community/ urban farming also supported



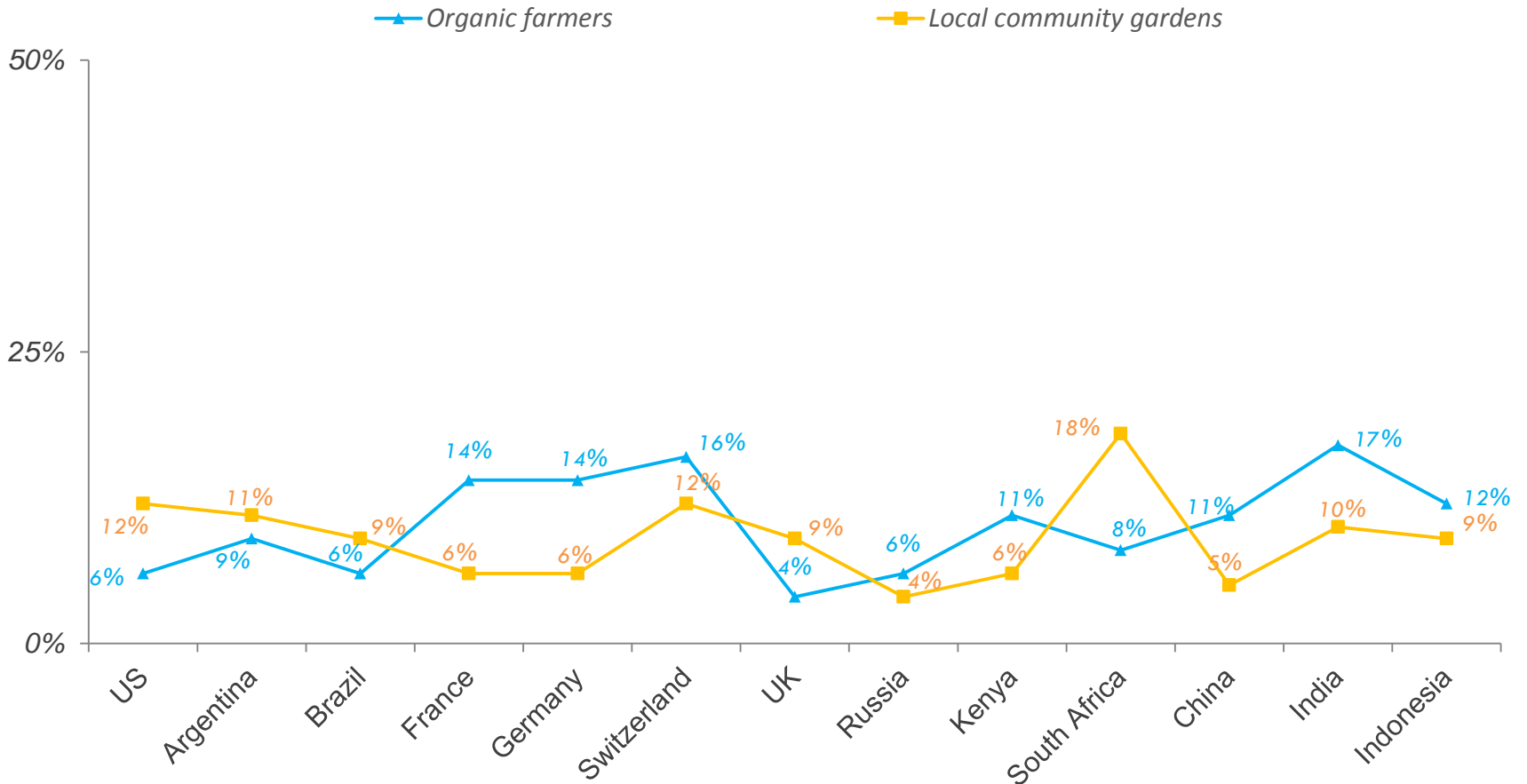
Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Local Community or Urban Farming

But large scale farming and governments seen as having the greatest potential to meet future food needs



And which of the following do you believe has the greatest potential to meet the increased production demands of a growing global population?

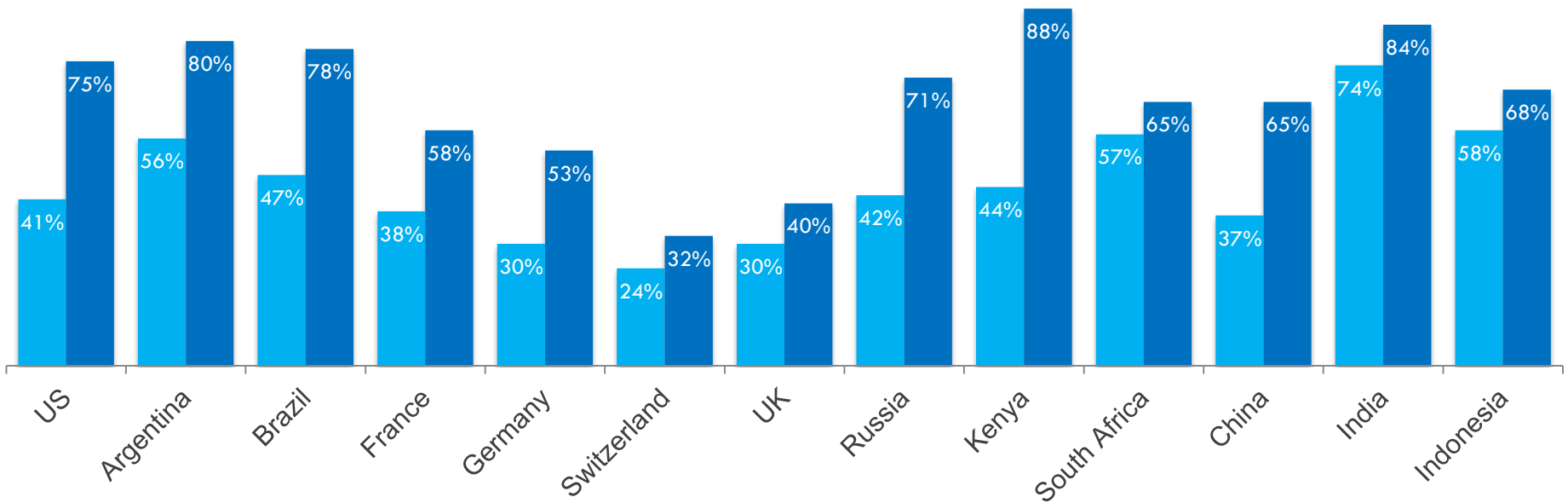
Organic/ local community farming seen as less meaningful to food production on a global scale



And which of the following do you believe has the greatest potential to meet the increased production demands of a growing global population?

Self-sufficiency seen as possible in most countries but imports also acceptable

■ Food should be produced domestically ■ Food can be produced domestically



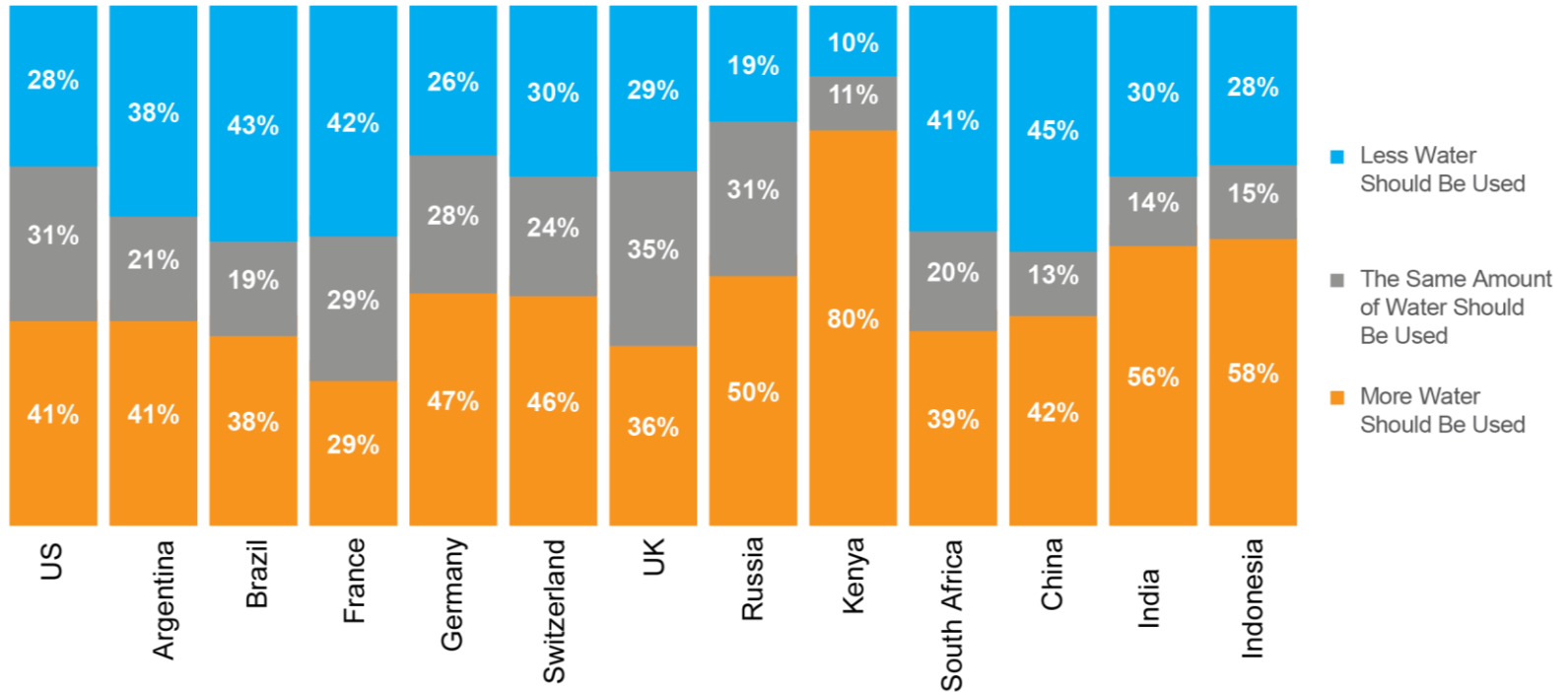
Do you believe that the food industry in [country] should produce all of the food required to feed the [country] population domestically ,or do you believe that importing certain foods to supplement domestic production is acceptable?

Do you believe that the food industry in [country] has the capacity to produce all of the food required to feed the [country] population or do you believe imports are necessary?

ENVIRONMENT

Environment - water

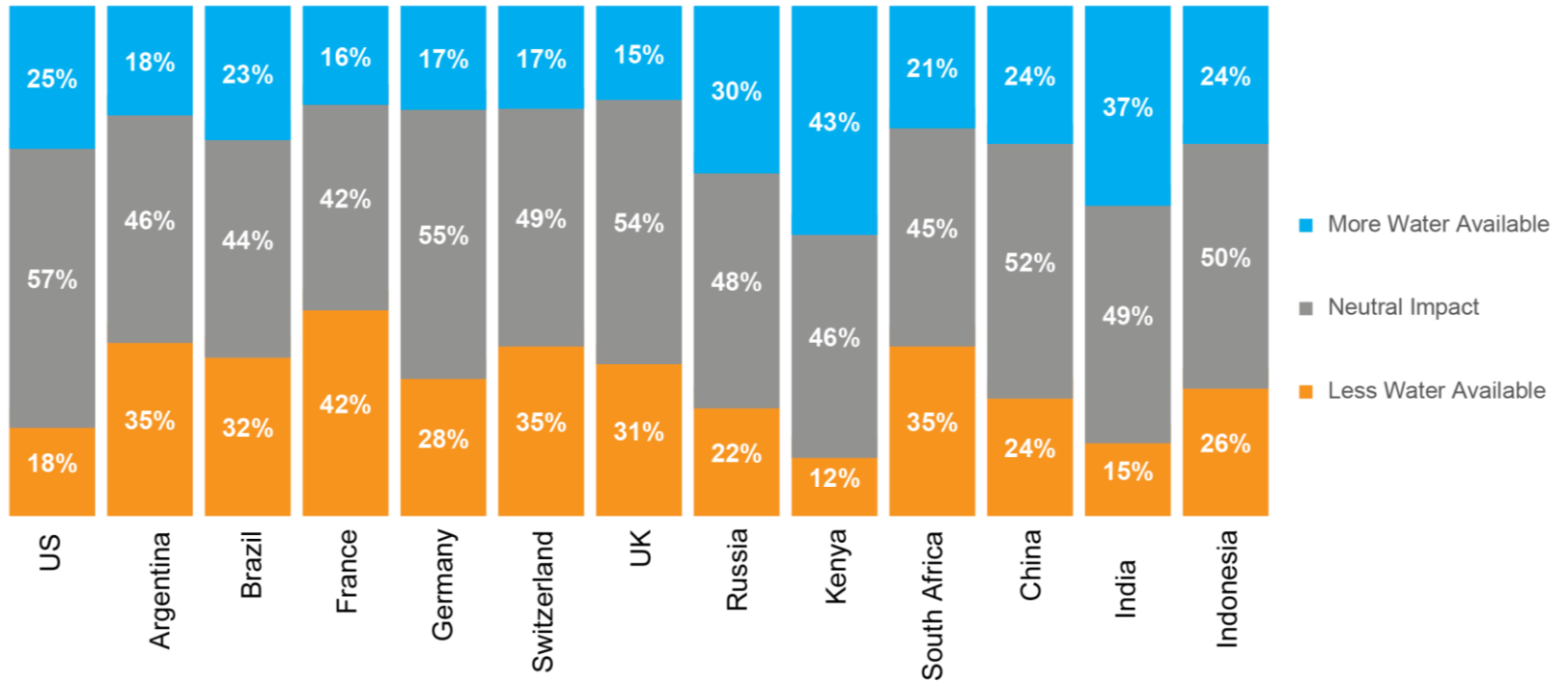
Respondents in most markets believe we should use more water for agriculture in the future.



Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Water

Environment - water

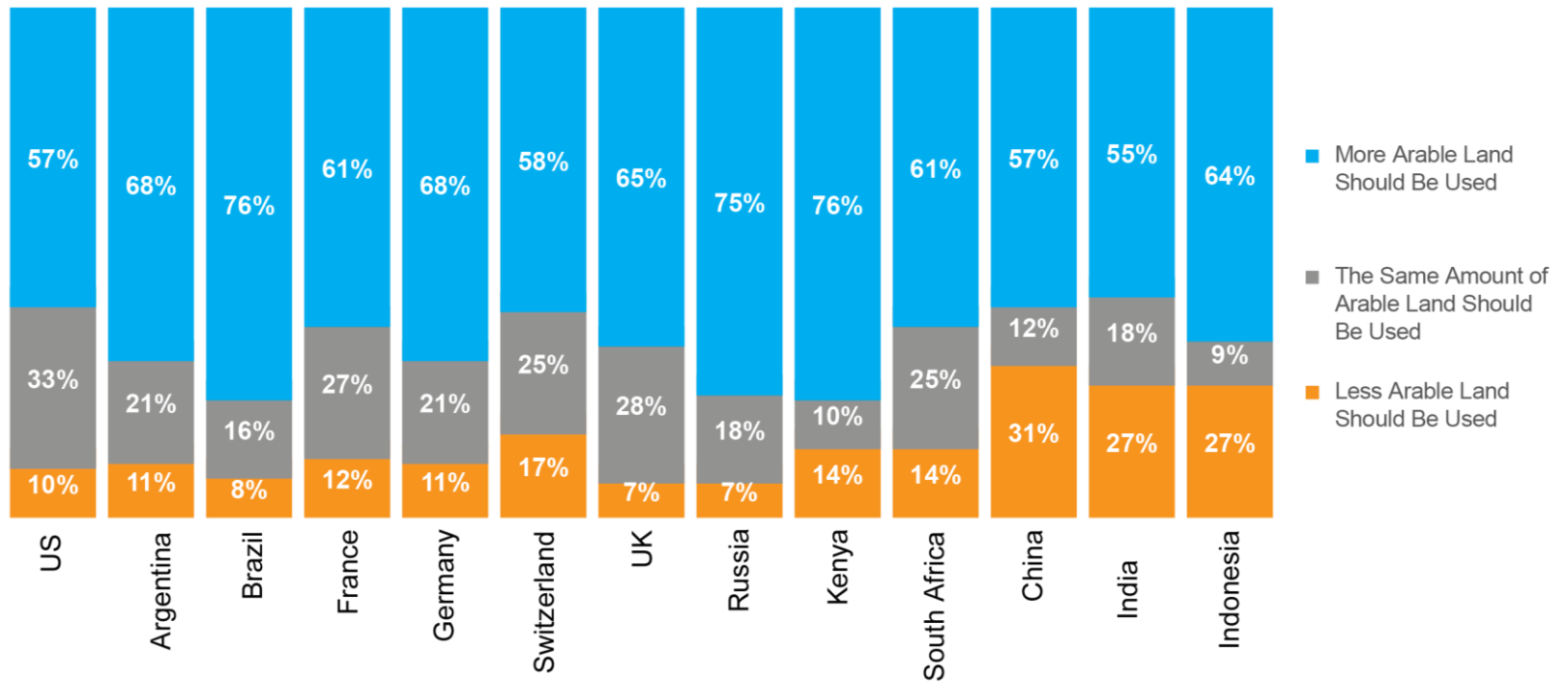
Although understanding of the consequences of increased production on global water supplies is mixed.



Below are a number of potential impacts that increased global food production could have on our lives and our environment. Thinking about each, what impact do you believe increased global food production could have? Water Supply

Environment - arable land

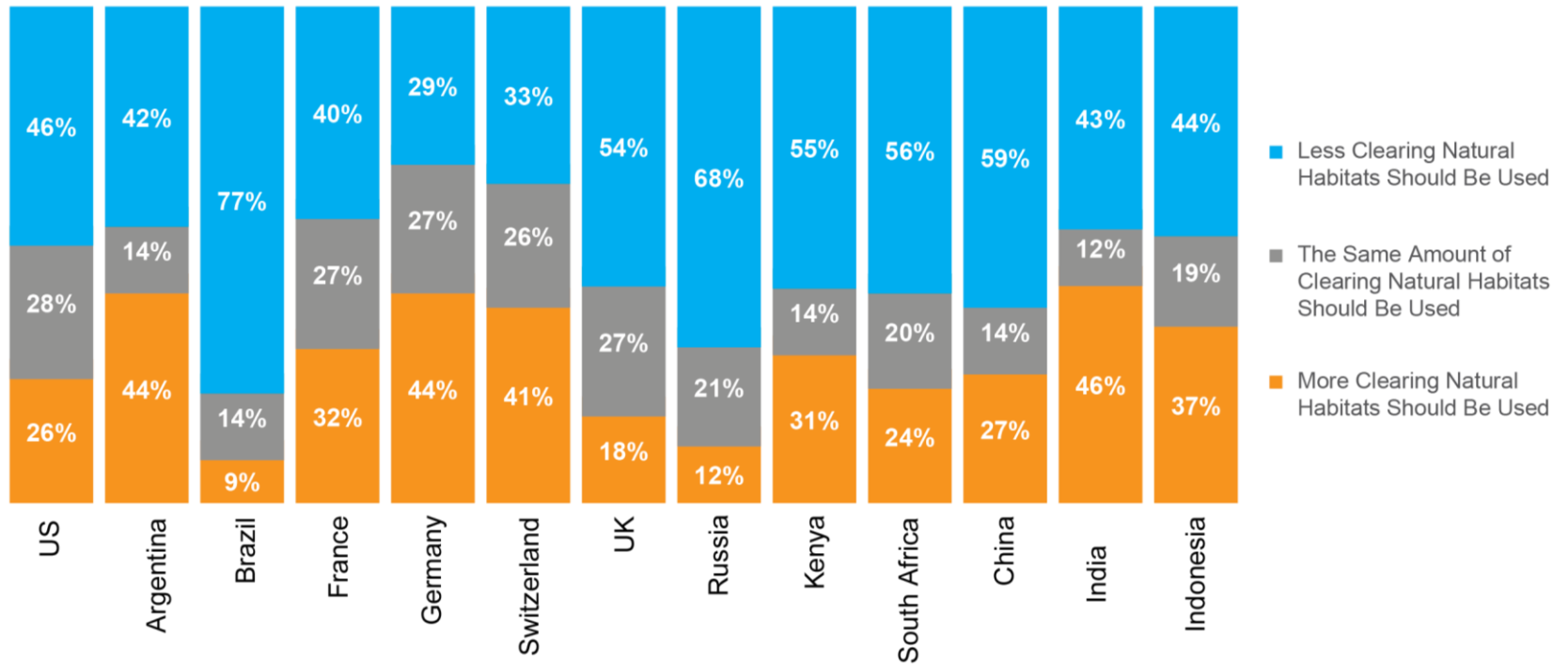
Most individuals believe that more land should be used for farming to increase food production.



Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Arable Land

Environment – natural habitats

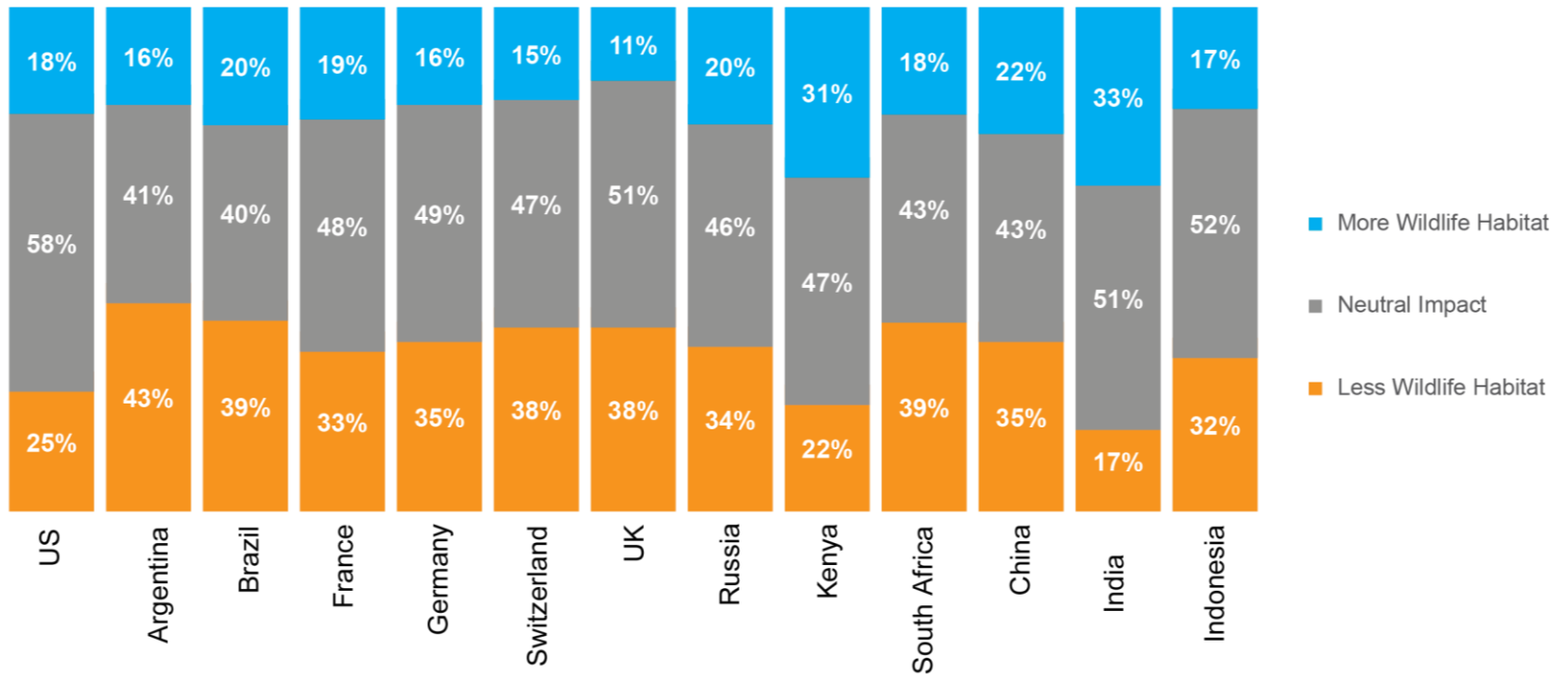
But most also believe natural habitats should not be cleared.



Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Clearing Natural Habitats to Create More Farmland

Environment – wildlife habitats

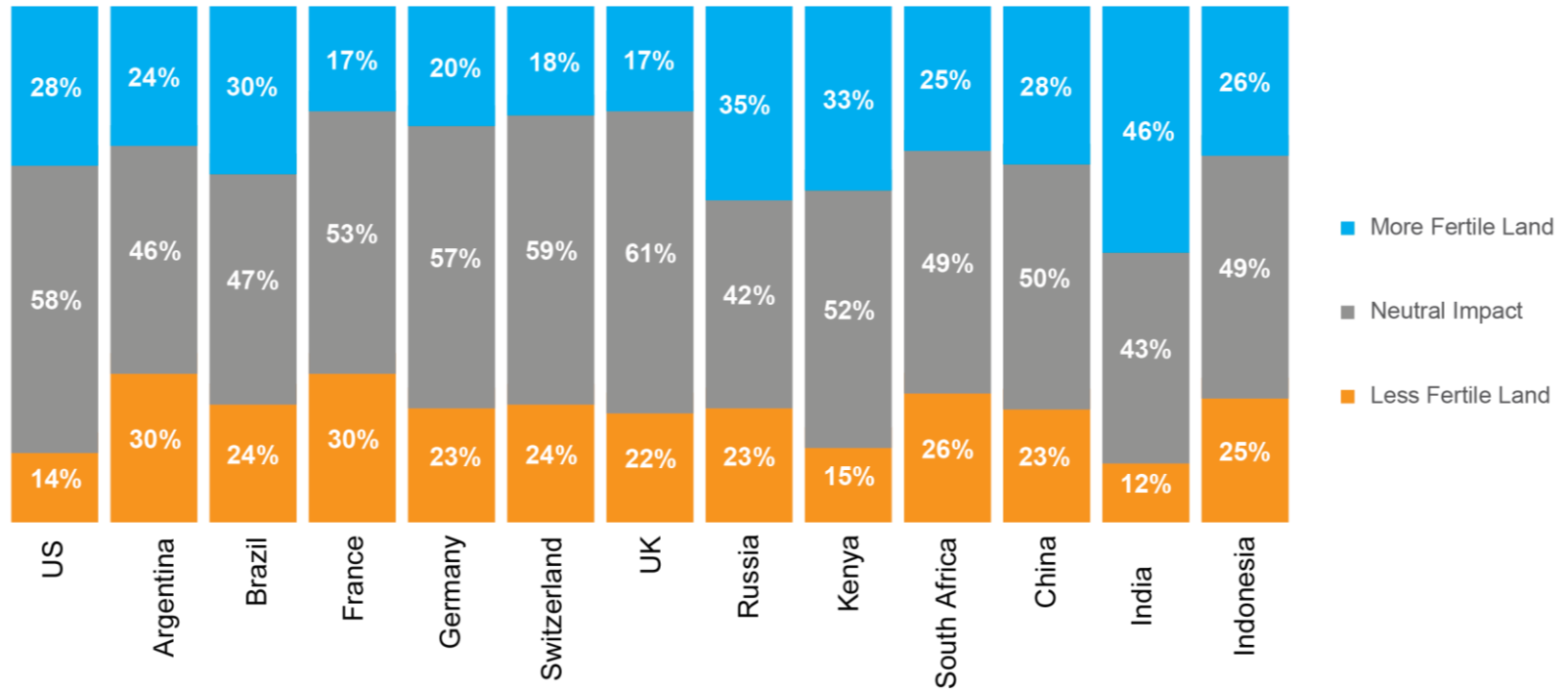
And there is much uncertainty about the potential impact on wildlife.



Below are a number of potential impacts that increased global food production could have on our lives and our environment. Thinking about each, what impact do you believe increased global food production could have? Wildlife Habitat

Environment – land fertility

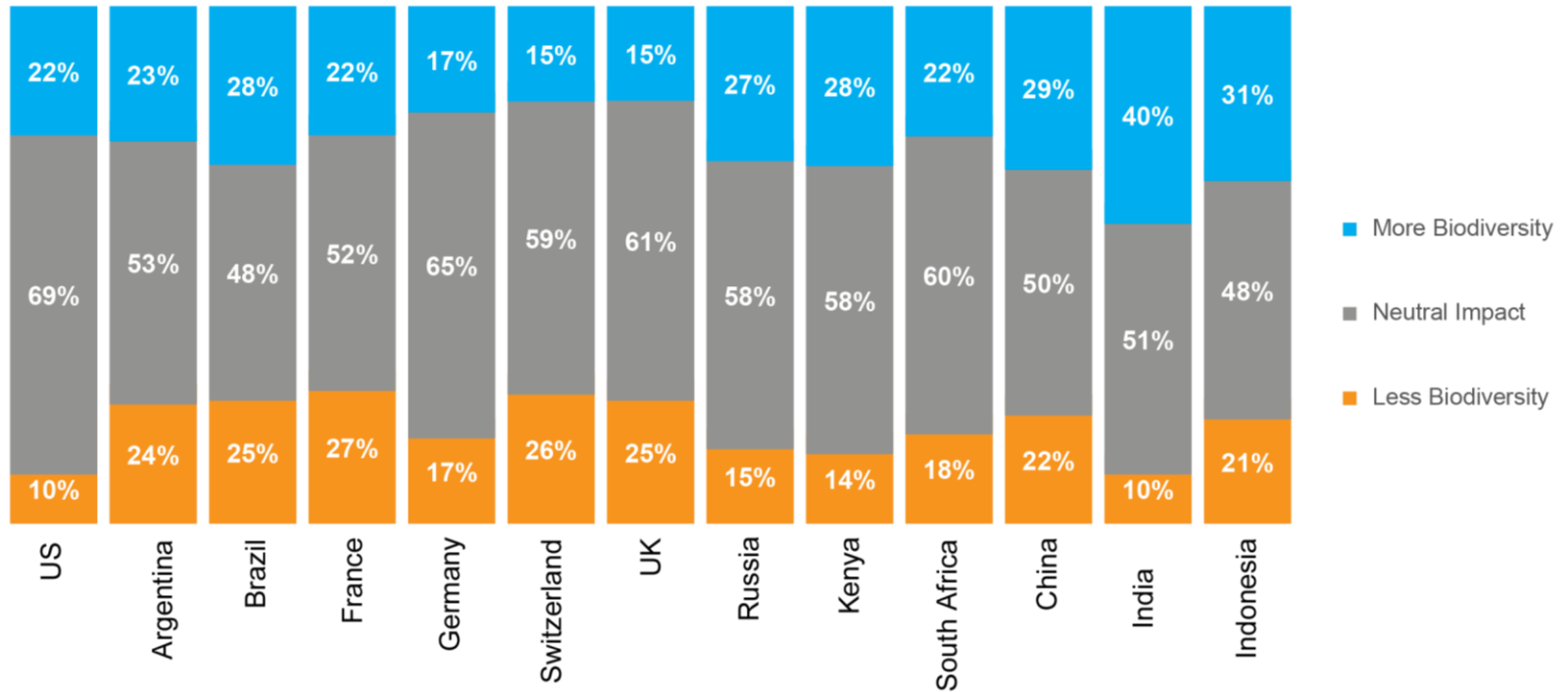
And uncertainty about the impact on land fertility.



Below are a number of potential impacts that increased global food production could have on our lives and our environment. Thinking about each, what impact do you believe increased global food production could have? Land Fertility

Environment - biodiversity

And uncertainty about the impact on biodiversity.

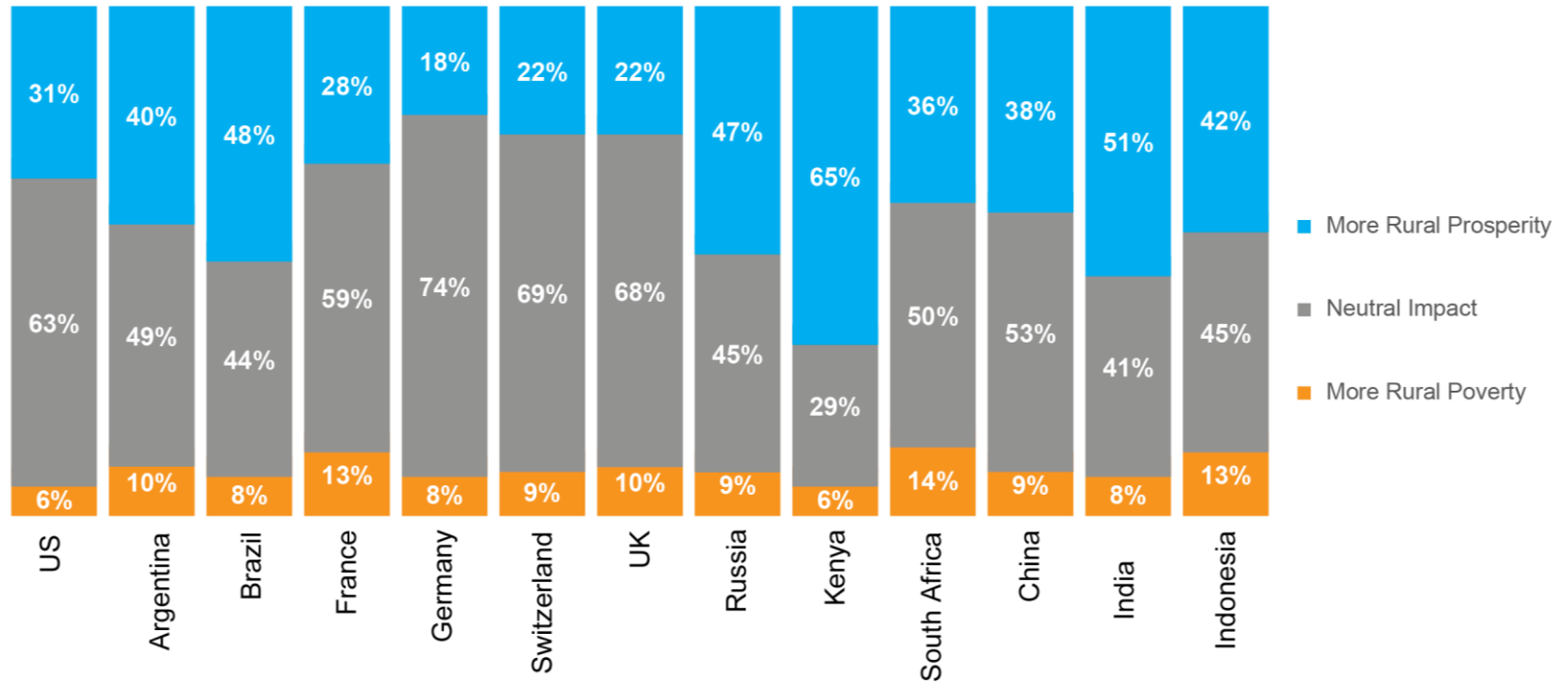


Below are a number of potential impacts that increased global food production could have on our lives and our environment. Thinking about each, what impact do you believe increased global food production could have? Biodiversity

PEOPLE

People - rural prosperity

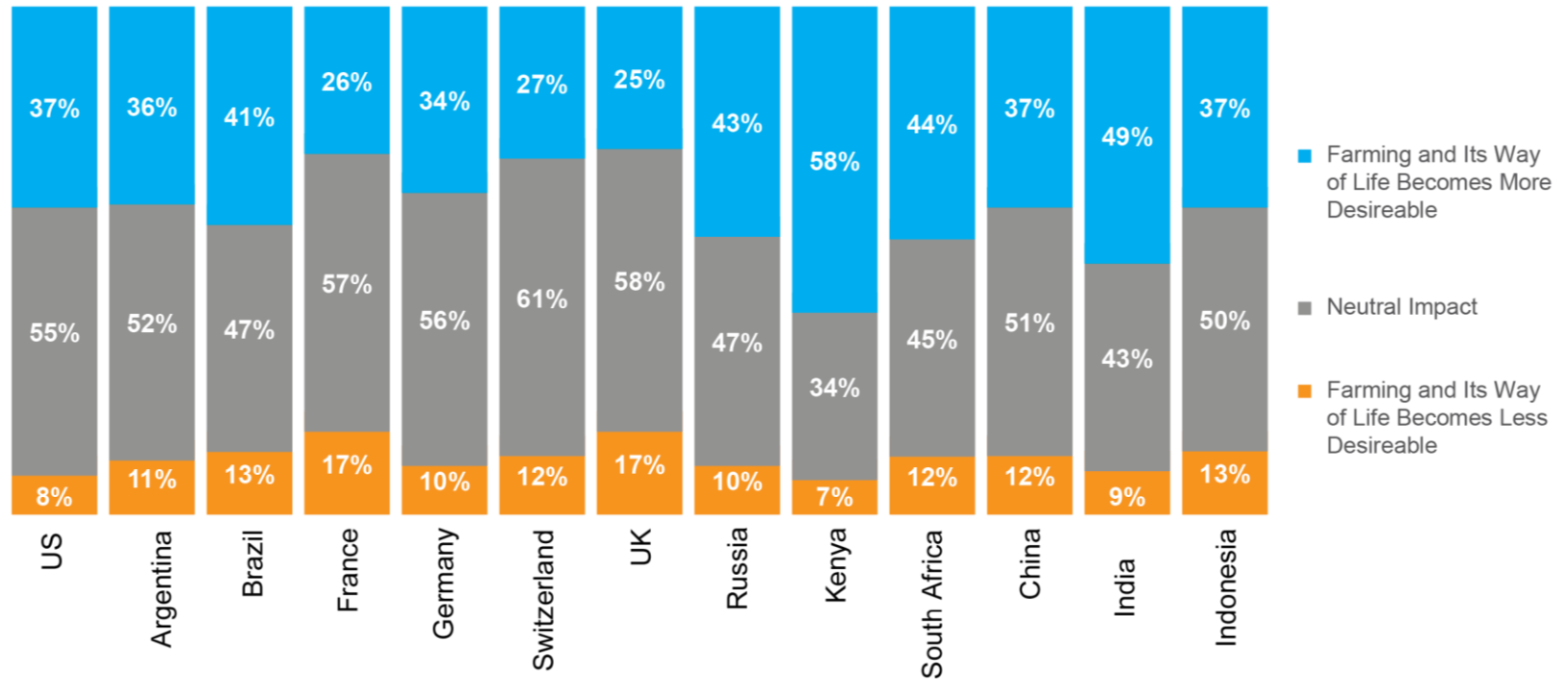
While many respondents believe that increased food production will have a positive impact on rural prosperity, there is also much uncertainty.



Below are a number of potential impacts that increased global food production could have on our lives and our environment. Thinking about each, what impact do you believe increased global food production could have? Rural Prosperity

People – rural communities

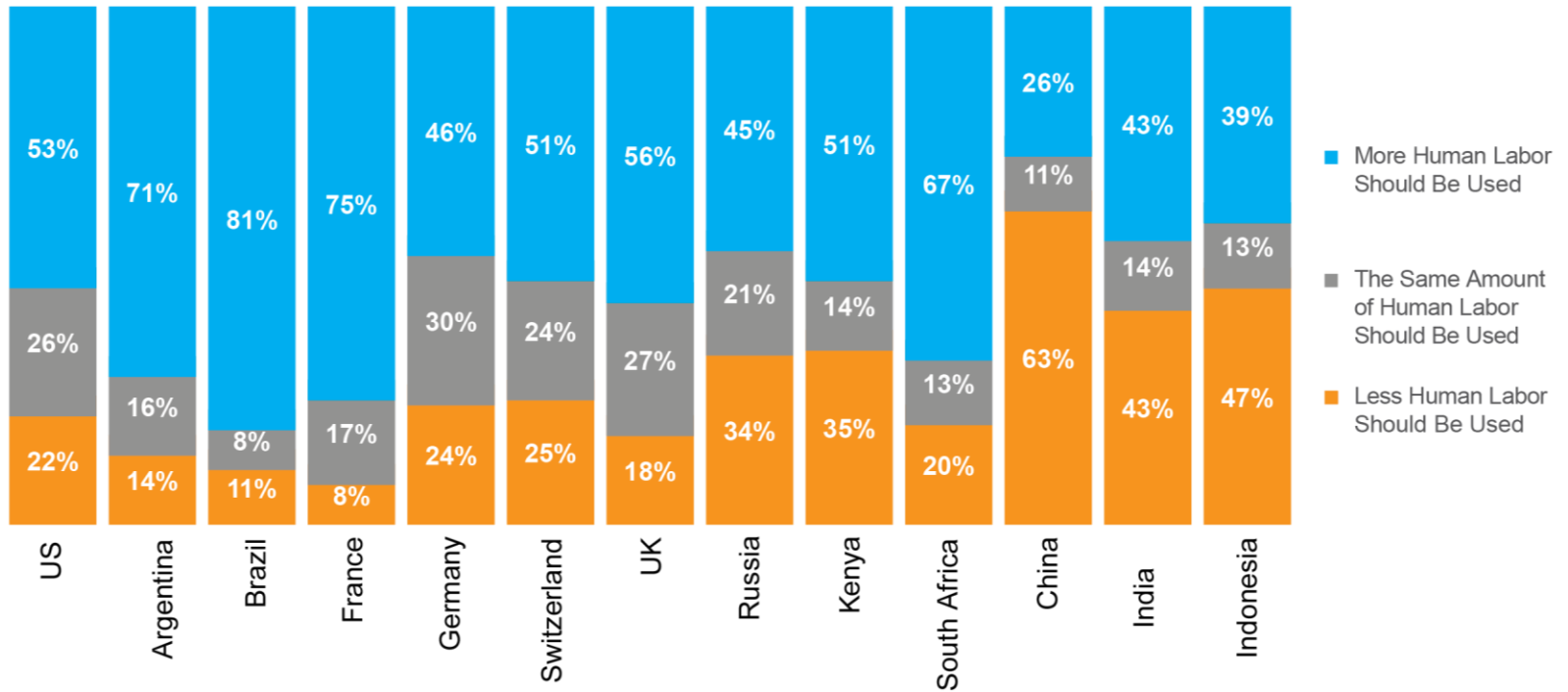
As productivity increases, it is believed by many that farming will become a more desirable way of life.



Below are a number of potential impacts that increased global food production could have on our lives and our environment. Thinking about each, what impact do you believe increased global food production could have? Preserving Farming as a Way of Life

People - human labor

With the exception of Asia-Pacific, most believe that more human labor should be used to produce more food.



Many different tools and technologies are used in farming today. For each of the items below, please indicate whether you believe that we should be using more of it, less of it, or about the same amount as now to produce more food for the world's growing population? Human Labor



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