

# A SURVEY ON HOW COVID-19 AFFECTED FOOD SYSTEMS/SECTOR AND URBAN FARMING IN CITYZEN PROJECT PARTNER REGIONS

## *CONSOLIDATED RESULTS*

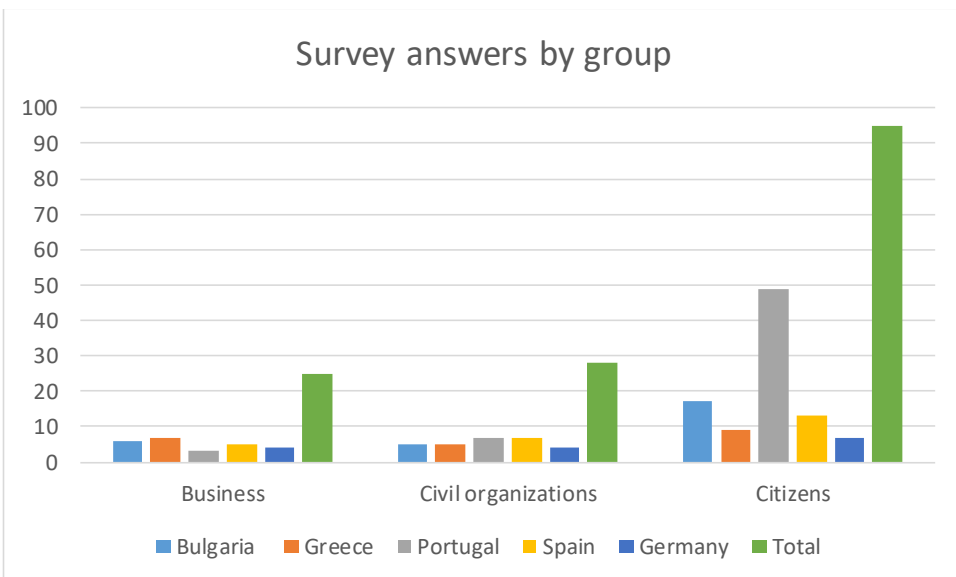
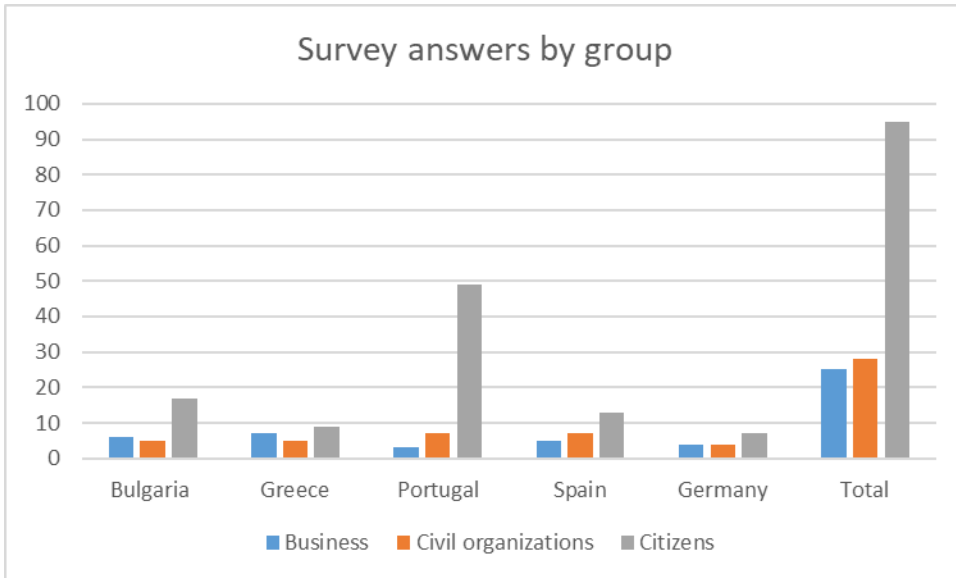
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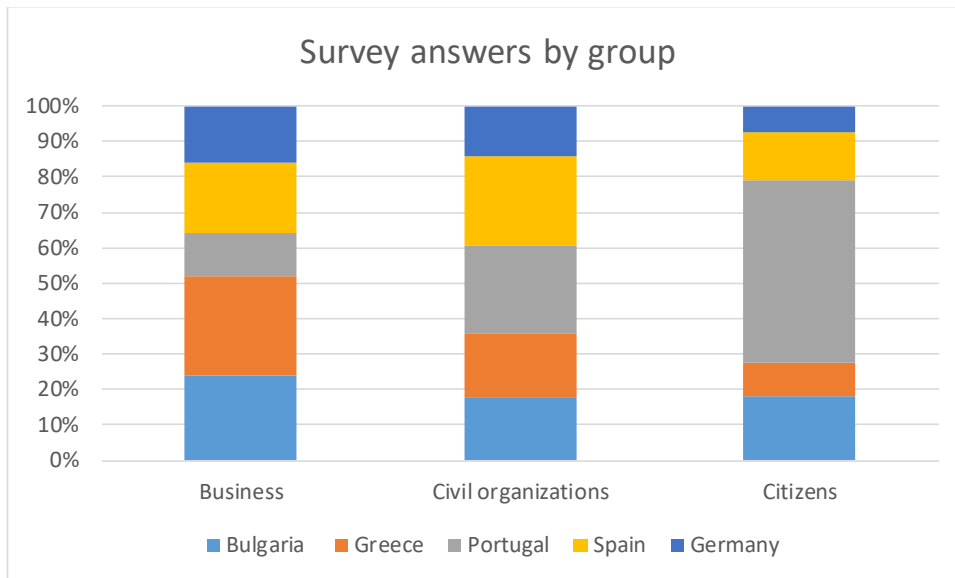
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### Total of answers by group

	TOTAL ANSWERS			
	<i>Business</i>	<i>Civil organizations</i>	<i>Citizens</i>	<i>Total</i>
<b>Bulgaria</b>	6	5	17	28
<b>Greece</b>	7	5	9	21
<b>Portugal</b>	3	7	49	59
<b>Spain</b>	5	7	13	25
<b>Germany</b>	4	4	7	15
<b>Total</b>	<b>25</b>	<b>28</b>	<b>95</b>	<b>148</b>



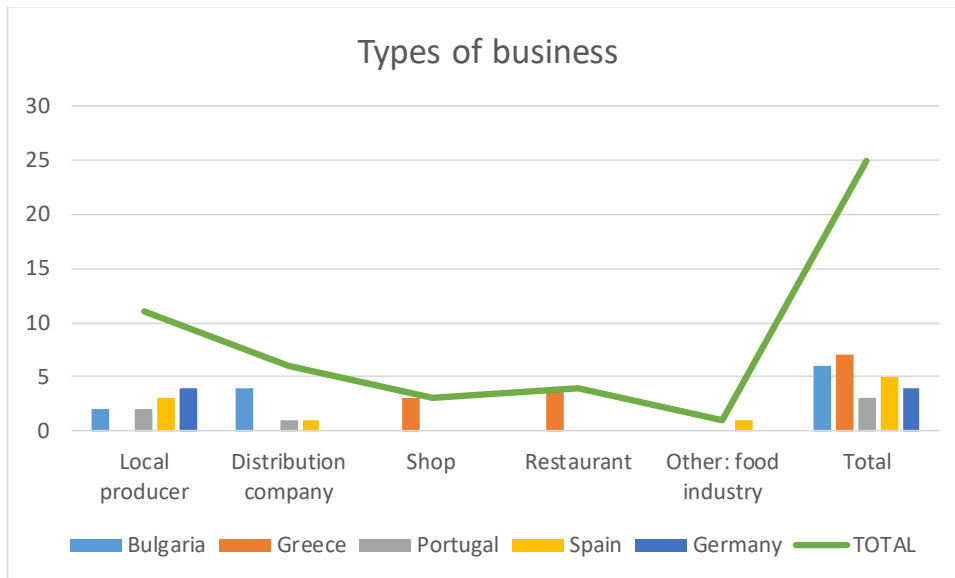


## 1. Responses by Businesses

### 1. Identification as a business

There is a total of 25 businesses answers provided, categorized as follows:

	<i>Business</i>					Total
	Local producer	Distribution company	Shop	Restaurant	Other: food industry	
Bulgaria	2	4				6
Greece			3	4		7
Portugal	2	1				3
Spain	3	1			1	5
Germany	4					4
<b>TOTAL</b>	<b>11</b>	<b>6</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>25</b>



## 2. Have you noticed a variation in the demand of some products or a group of products during lockdowns?

- ✓ In Bulgaria (Sofia region), most of the respondents indicate that they noticed an increase in the demand for certain foods or food groups with several interesting trends:
  - an increasing demand for basic foods – as pasta, meat and dairy products, as well as those foods that can be stored and retain their nutritional qualities for a long time, incl. frozen foods (e.g. various canned foods, beans, lentils, pasta, spaghetti, basic biscuits);
  - an increasing demand for citrus fruits such as lemons and oranges, spices and herbs such as ginger. The increased demand is most likely driven by the recommendations of health organizations and medical professionals to citizens to consume more vitamins and nutrients to boost immunity.
- ✓ In Greece (Central Macedonia Region), there is not a prominent trend on this matter. However, essentials and mainly imported products were reported to have increased demand during the lockdowns. On the other hand, specific fruits and vegetables were reported to have a decrease in demand.
- ✓ In Portugal (Baixo Alentejo Region), most of the respondents didn't report any changes in the demand.
- ✓ In Spain (Castilla & León Region), all respondents indicated that they noticed an increase in the demand for certain foods or food groups as legumes, canned vegetables and fish, eggs, vegetables, almonds, hazelnuts and walnuts, organic almond, carrot and leek (pureed ingredients).

- ✓ In Germany (Frankfurt Rhine Main Metropolitan Region), all respondents report increase in the demand at least for certain products as: vegetables, fruit, eggs, juice, and cider. One (out of 4) business reported a drop in overall demand after the lockdown to a level 20 % lower than before lockdown.

### **3. Have you noticed an increased in the demand for local\* products due to COVID crisis? (\*products from the region)**

- ✓ In Bulgaria (Sofia Region), the majority of the respondents could not assess or report that there was no increase in the demand for locally produced products due to the COVID-19 crisis.
- ✓ In Greece (Central Macedonia Region), most of the respondents are not able to assess if there was an increase in the demand for local products due to the Covid-19 crisis. Only 1 business reported an increase in the demand.
- ✓ In Portugal (Baixo Alentejo Region), all respondents reported no increase in the demand for local products due to the COVID crisis.
- ✓ In Spain (Castilla & León Region), most of the respondents could not assess or indicated that they notice a change. Those who experienced an increase in demand indicated it for products such as eggs, asparagus (10%) and organic almond (30%).

### **4. Have you noticed an increase in food e-commerce for your business or sector due to pandemics?**

- ✓ In Bulgaria, most respondents report an increase in food e-commerce as a result of the pandemic. Restrictive measures and personal safety issues have encouraged some people to change their consumer behaviour and step up their online food shopping. The average increase is between 15 and 20%.
- ✓ In Greece, most businesses report an increase in food e-commerce for their business or sector due to the pandemic.
- ✓ In Portugal, most of the respondents recognised a rise of innovative business models in urban farming and, concerning the purchase channels, most reported a remarkable growth in e-commerce in their field, reporting 20% and up to 50% increases.
- ✓ In Spain, 60% report an increase in food e-commerce as a result of the pandemic. The average increase is 15 %.
- ✓ In Germany, an increased importance of food e-commerce due to the pandemic was noted by half of the respondents.

### **5. Have you increased the hours of teleworking for your employees?**

- ✓ In Bulgaria, most businesses in various industries had to reorganize their work habits during the pandemic, as evidenced by the business respondents – 33% of them increased their remote/teleworking hours for the employees during the lockdowns; and another 33% continued practicing it even after loosening of the measures.
- ✓ In Greece, none business reported having increased hours of teleworking for their employees.
- ✓ In Portugal there were an increase in hours of teleworking during and after lockdowns.
- ✓ In Spain, the answers showed that majority of the business did not increase the teleworking hours for their employees; some minor part of the respondents claim an increase only for the period of lockdowns.
- ✓ In Germany, an increased share of teleworking due to the pandemic was noted by half of the respondents.

#### **6. Have you noticed an increase in demand for ready-to-eat food?**

- ✓ In Bulgaria, another trend that is noticeable and evidenced by the survey results is the increased interest in the demand for ready-to-eat food both during and after the lockdown.
- ✓ In Greece, most businesses respondents reported an increase in demand for ready-to-eat food (most of them only during lockdown).
- ✓ In Portugal, there is no clear trend.
- ✓ In Spain, most of the respondents report no change, although some claim an increase in the demand.
- ✓ In Germany, only one respondent noted an increase in the demand for ready-to-eat food, but that could be due to the others not offering such.

#### **7. Have you increased the food delivered to household?**

- ✓ In Bulgaria, generally, increased demand for ordering food online has challenged the logistics management of a number of business companies. Most of the respondents report that they have increased the share of food delivered to households, stating to use a third party for the purpose – a platform for fulfillment of the delivery. Some of them also indicated an increase in profits.
- ✓ In Greece, just 1 reported having increased the food delivery to households (with a 40% total amount of profit).
- ✓ In Portugal, none of the respondents noted an increase in the sale of food products to households.

- ✓ In Spain, the survey shows an increase in the food delivered to households (20%) with an increase of profits of approx. 20%, however, most of the respondents have not noticed an increase in food delivered to households.
- ✓ In Germany, a majority of the responding businesses reported no change.

#### **8. Have you noticed an increase in demand for fresh products?**

- ✓ In Bulgaria, 50% of the respondents report an increased demand for fruits and vegetables in total during and after the lockdown and for the rest, there is no change.
- ✓ In Greece, the majority of the businesses reported an increase in demand for fresh products during the lockdown or after the lockdown and for the rest, there is no change.
- ✓ In Portugal, none of the respondents noted an increase in demand for fresh products.
- ✓ In Spain, 80% of the respondent report an increased demand for fresh products during lockdown, 40% of the respondents report an increased demand for fresh products in total during and after the lockdown, while for 20% there is no such change in the demand.
- ✓ In Germany, three of the four businesses noted increased demand for fresh products during lockdowns, only one after lockdowns.

#### **9. Have your food prices changed?**

- ✓ In Bulgaria, half of the surveyed businesses report changes in their food prices. For all of them the increase is by less than 30%.
- ✓ In Greece, for most of the businesses that participated in the survey there has been no change in their food prices due to the pandemic. On the contrary, for the rest, their food prices increased by less than 30% due to the pandemic.
- ✓ In Portugal, none of the businesses surveyed changed their prices.
- ✓ In Spain, the majority (60%) of the surveyed businesses report changes in their food prices. For most of them the increase was between 30-70% and for the rest, by less than 30%.
- ✓ In Germany, a majority of the responding businesses reported no change.

#### **10. Have you noticed a change in import of food products in your region?**

- ✓ In Bulgaria, the majority of respondents do not notice a change in food imports in the region.

- ✓ In Greece, the majority of respondents do not notice a change in food imports in the region. The rest (29%) noticed an increase imports of dairy products and oils with an average of 23%.
- ✓ In Portugal, just one of the three spotted a change in his/her field (nuts), which he described as varying over the crisis (increasing for some periods and decreasing in others). Most of the respondents reported no change.
- ✓ In Spain, participants did not notice a change in food imports in the region.
- ✓ In Germany, a majority of the responding businesses reported no change.

**11. Have you received any support by your local, regional or national government to sustain your business during lockdowns (subsidy, information campaign, tax reduction, etc.?)**

- ✓ In Bulgaria, an 80% did not benefit from support from local, regional or national authorities to sustain their business during lockdowns.
- ✓ In Greece, over half of the businesses report having received support by local, regional or national government in order to sustain their business during lockdowns, such as state refundable deposits and state subsidies.
- ✓ In Portugal, only one out of three respondents (more than 30%) claim to have received local, regional or national support during the crisis, namely an extended period for bank payments.
- ✓ In Spain, 40% of the respondents' answers received a financial support (subsidy).
- ✓ In Germany, only one business (out of 4) reported having received special government support during lockdowns, in the form of a waiver of farmers' market fees.

**12. What are your recommendations to local authorities for support measures to urban farming?**

- ✓ In Bulgaria, respondents indicate interest in all of the proposed support measures, with a predominant need for:
  - small grants to launch urban gardens;
  - better access to plots in urban areas (free or at preferential prices);
  - tax reduction for commercial urban farming;
  - free use of water and electricity for urban gardens.

In addition, the participants in the survey complement the list with the following recommendations and comments to urban farming (UF) managing authorities:

- support for innovative business solutions in production, incl. social innovations;



- promotion and incentives for the use of already existing innovative solutions and systems for urban agriculture (e.g. aquaponics, aeroponics, hydroponics);
- creation of digital maps indicating available plots/opportunities for urban farming;
- need of regulation of urban farming, incl. go-to-market for hobby farmers and realization of surplus produce at household level;
- creation of platforms for trade and donations of surplus produce;
- more information campaigns with regard to UF;
- active search for opportunities for landscaping of public and business buildings (e.g. rooftop gardens and indoor vertical gardens);
- continuous promotion of community gardens as a means of hobby and recreation places for citizens;
- development of policy capacity building and business accelerator programs to support innovative business solutions in urban farming.

It is noteworthy that the participants in the survey demonstrated an extensive knowledge of the challenges in front of the UF. The proposed measures address a wide range of business, social and regulatory challenges, and the solution requires a scholastic approach, broad public debate and involvement of all stakeholders.

- ✓ In Greece, most of the respondents recommend small grants to launch urban gardens and tax reductions for commercial urban activities as one of the most prominent measures that local authorities should employ in order to support urban farming. Other recommendations include: vouchers for advisory/technical services and free access to farmer's markets. Finally, free use of water and electricity for urban gardens and rental schemes for basic infrastructure has been recommended by some minority businesses among those participating in the survey.
- ✓ In Portugal, the main recommendations to local authorities include: small grants for urban gardens, free access to farmer's markets, tax reduction for commercial urban farming and free use of water and electricity for this kind of gardens.
- ✓ In Spain, respondents indicate interest in all of the proposed support measures, with the predominant need for free access to farmers' markets. They complement the list given with two additional measures:
  - Vouchers for financial support to small business
  - Support to producers in rural areas to foster urban-rural links of the food system
- ✓ In Germany, the most urgent need stands for: better access for households to plots in urban areas, vouchers for advisory/technical services, free access to farmers' markets and free use of water and electricity for urban gardens.

Three out of these four measures could lead to cost reductions for the businesses, indicating that the economy of their day-to-day operations is a primary concern.

Additionally, one of the business respondents voiced the need for “better overall access to the means of production and markets for small and micro enterprises”.

**13. Have you noticed the arise of innovative business models in urban farming during the pandemic?**

- ✓ In Bulgaria, half of the respondents answered that they are witnessing emerging new business models in urban farming. Examples include: platforms such as Rent a Tree and Rent a Farm and technologies in UF that significantly reduce the resources needed to grow up farming products (the advanced technologies also save employee’s time, energy and increase quality of the yields).
- ✓ In Greece, just 1 of 7 reports to notice an arise of innovative business models in urban farming during the pandemic.
- ✓ In Portugal, most of the respondents recognised a rise of innovative business models in urban farming, mostly related to online sales and e-commerce.
- ✓ In Spain, 40 % of the respondents answered that they are witnessing emerging new business models in urban farming. Examples include: people have even tended to plant their own tomatoes on terraces and new packaging and energy efficiency to reduce costs due to price increases in supplies.
- ✓ In Germany, there is no clear trend.

**14. Have you redesigned your supply chain management during the pandemic (e.g. contacts with suppliers, subcontractors, shortening the food delivery time/logistics)?**

- ✓ In Bulgaria, half of the respondents’ state that they had to redesign their supply chain management – this need is mostly related to changes and development of the food e-commerce and business process digitalization (e.g. electronic document management).  
Some of them shared difficulties experienced in the organization of the extraordinary deliveries considering changes in the logistics and related to increased demand or depletion of certain products.
- ✓ In Greece, less than half of the asked businesses report having redesigned their supply chain management during the pandemic.
- ✓ In Portugal, just one (out of three) of the respondents noticed changes in the daily process, depending more on phone and email contacts.
- ✓ In Spain, 40% of the respondents state that they had to redesign their supply chain management to minimize the effects of disrupted supplies and distribution

to hospitality sector and the reduction of certain markets such as hostels and restaurants.

- ✓ In Germany, a majority of respondents declare no change.

## Conclusions on COVID's Impacts Surveys on Business.

### Emerging trends based on the results

- ✓ In Bulgaria (Sofia Region), Spain (Castilla & León Region) and Germany (Frankfurt Rhine Main Metropolitan Region) there was an increasing demand for certain food products, as in Greece (Central Macedonia Region) there was not a clear trend (it depends on food categories) and in Portugal (Baixo Alentejo Region) there was no any increase, even there was a reduction in consumers' purchase power, on average.
- ✓ For all regions, there is no clear change in demand for local products.
- ✓ For all regions, there is upward trend for food e-commerce.
- ✓ Slight increase in hours of teleworking for employees during and after the lockdown in Sofia Region (Bulgaria), Baixo Alentejo (Portugal) and Frankfurt Rhine Main Metropolitan Region (Germany) as in Castilla & León Region (Spain) only during the lockdown and in Central Macedonia Region (Greece), there was no change.
- ✓ Upward trend in the demand in ready-to-eat food during and after lockdown in Sofia Region (Bulgaria), Baixo Alentejo Region (Portugal) and Central Macedonia Region (Greece) as in Castilla & León Region (Spain) and Frankfurt Rhine Main Metropolitan Region (Germany) there is not so prominent increase.
- ✓ Upward trend in the food delivered to household in Bulgaria and Greece, while there is no change in Portugal and Germany. There is a slight increase in Spain.
- ✓ Increasing demand for fresh products during and after lockdown in Bulgaria, Greece, Spain and Germany, while in Portugal, there is no change.
- ✓ There is no change in food prices in Portugal and Germany, while in Spain most respondents changed their prices by more than 30%; in Bulgaria, half of them and in Greece, 30% of business changed the prices by less than 30%.
- ✓ In all regions, most of the respondents did not notice a change in import of food products.
- ✓ With regard to receiving support by local, regional or national government, the majority of respondents did not receive such in Bulgaria, Portugal, Spain and Germany, while in Greece, more than half received some support.
- ✓ As for noticing the emergence of innovative business models in urban farming, there are different trends in each region. In Bulgaria, Portugal and Spain there are emerging new business models, while in Greece and Germany this issue is not so clear to report.

- ✓ Half or nearly half of business respondents redesigned their supply chain in Bulgaria and Greece, while in Portugal and Spain the percentage is even higher.

### **Main recommendations to local authorities for support measures**

- ✓ Small grants to launch urban gardens is chosen mostly by respondents in Bulgaria, Greece and Portugal.
- ✓ Better access to plots in urban areas (free or at preferential prices) is a preferred measure in Bulgaria and Germany.
- ✓ Vouchers for advisory/technical services is a preferred measure in Germany.
- ✓ Free access to farmer's markets is a preferred measure in Spain and Germany.
- ✓ Tax reduction for commercial urban farming is a preferred measure in Bulgaria, Greece and Portugal.
- ✓ Free use of water and electricity for urban gardens is a preferred measure in Bulgaria, Portugal and Germany.

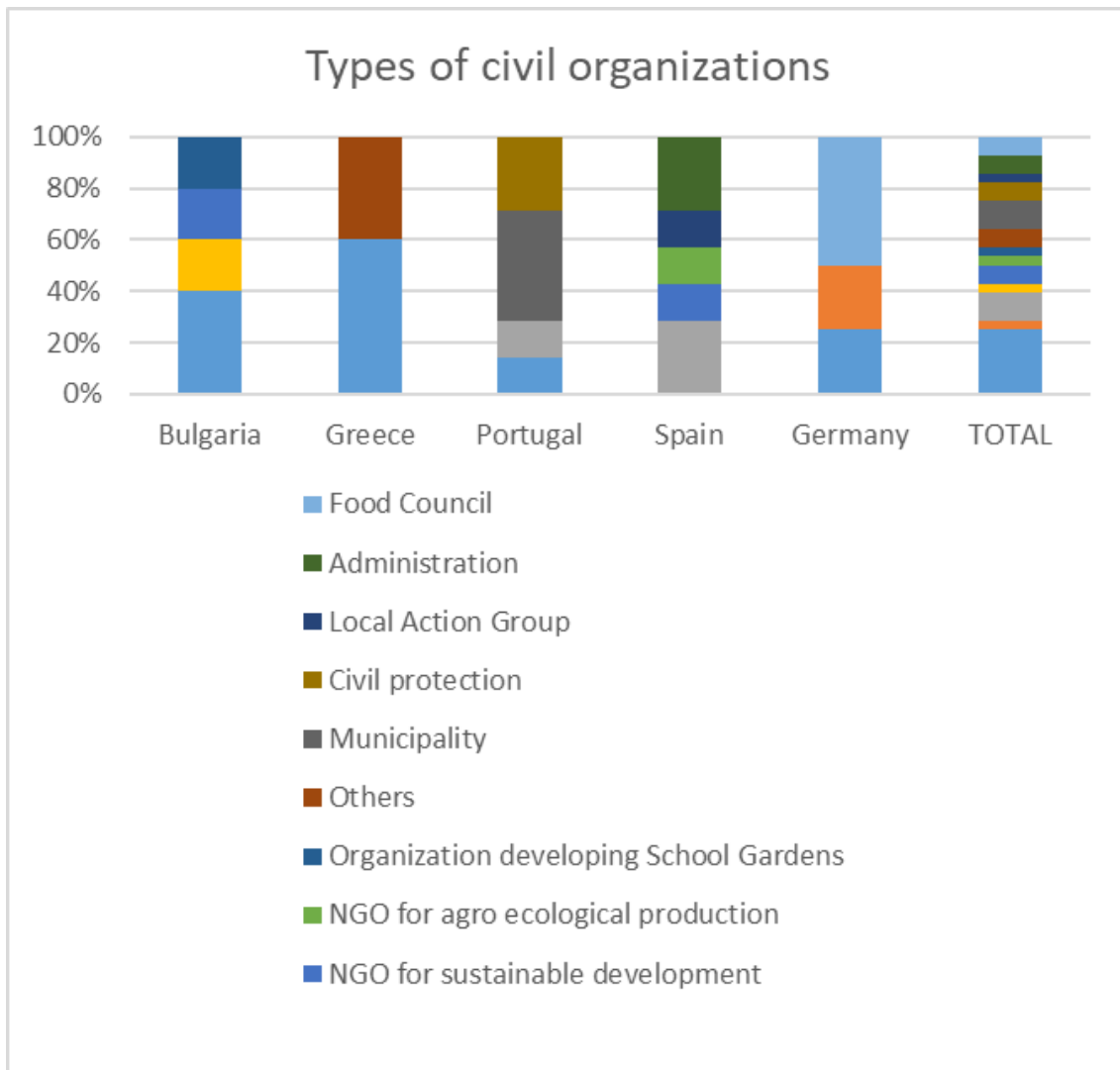
### **Other added recommendations to local authorities for support measures**

- ✓ In Bulgaria,
  - support for innovative business solutions in production, incl. social innovations;
  - creation of digital maps indicating available plots/opportunities for urban farming;
  - need of regulation of urban farming, incl. go-to-market for hobby farmers and realization of surplus produce at household level;
  - creation of platforms for trade and donations of surplus produce;
  - active search for opportunities for landscaping of public and business buildings (e.g. rooftop gardens and indoor vertical gardens);
  - continuous promotion of community gardens as a means of hobby and recreation places for citizens;
  - development of policy capacity building and business accelerator programs to support innovative business solutions in urban farming.
- ✓ In Spain,
  - Vouchers for financial support to small business
  - Support to producers in rural areas to foster urban-rural links of the food system
- ✓ In Germany,
  - better overall access to the means of production and markets for small and micro enterprises

## 2. Responses by Civil Society Organizations

### 1. What is your type of civil society organizations?

	Civil organizations					
	Bulgaria	Greece	Portugal	Spain	Germany	TOTAL
Community Garden	2	3	1		1	7
School Garden					1	1
Solidarity Organization			1	2		3
NGO for green innovation	1					1
NGO for sustainable development	1			1		2
NGO for agro ecological production				1		1
Organization developing School Gardens	1					1
Others		2				2
Municipality			3			3
Civil protection			2			2
Local Action Group				1		1
Administration				2		2
Food Council					2	2
<b>Total</b>	5	5	7	7	4	<b>28</b>



## 2. How was your urban garden affected during the lockdowns?

In most of the regions, most of respondents state that the lockdowns had neither a positive nor a negative impact on the development of the activity of the urban gardens.

## 3. How is your urban garden developing after the lockdowns?

- ✓ In Sofia Region (Bulgaria) and Frankfurt Rhine Main Metropolitan Region (Germany) the vast majority experienced a positive development after lockdowns.
- ✓ In Central Macedonia (Greece), there is no clear trends about how things evolve after the lockdown for urban gardens
- ✓ In Baixo-Alentejo Region (Portugal), although most reported no change, some considered a positive development for urban garden after lockdown.
- ✓ In Castila & León Region (Spain), less than half experienced a positive development.

**4. Have you changed the cultivated plants of your allotments due to the COVID-19 crisis?**

- ✓ In Bulgaria, most respondents answer that the pandemic has made them rethink and adapt their produce, stating that they have started growing seedlings of fast-growing species such as radishes, spinach and arugula, which can be grown year-round and at home.
- ✓ In Greece and in Portugal, no respondent report having changed the cultivated plants of their allotments due to COVID crisis.
- ✓ In Spain, most considered that they have made no changed, some (1 out of 7) indicates that he needed to adapt to other crops as tomatoes, spinach, chard and rutabaga.

**5. Have you noticed an increase in the demand for fresh products?**

In all regions, most respondents state that they noticed an increased demand for fresh products.

**6. Have the people working in the garden spent more time due to the COVID-19 crisis?**

- ✓ In Bulgaria and Germany, all respondents reported having spent more hours working in the garden due to COVID crisis.
- ✓ In Portugal and Spain, the majority of respondents have increased their working hours in the garden.
- ✓ In Greece, a minority reported having spent more hours working in the garden.

**7. Has the demand for allotments increased after lockdown?**

- ✓ In Bulgaria and Germany, all of the participants reported an increase in the demand for allotments after the lockdowns.

- ✓ In Portugal and Spain, most reported an increase in demand for allotments.
- ✓ On the contrary, in Greece, the majority of the respondents haven't noticed an increase in the demand for allotments after lockdown.

**8. Have you noticed an increased citizen's demand for participation in community gardens?**

- ✓ In Bulgaria and Germany, 100% of the respondents answered that they have noticed an increased interest of the citizens for participation in community gardens and UF activities.
- ✓ In Greece, only a minority of the respondents have noticed an increased citizen's demand for participation in community gardens.
- ✓ In Portugal and Spain, it was a majority of the respondents.

**9. Have you shared/donated your food produce during the lockdowns to neighbors, hospitals, charity organizations, etc.?**

- ✓ In Bulgaria and Germany, most of the respondents report that they have shared and/or donated part of their production during the lockdowns. The most common recipients were: neighborhood people, neighbors and other citizens. Most of them report that they continue to share food, incl. surplus quantities even after the lockdowns.

In Greece, Portugal and Spain, most of the respondents didn't share or donated their production or surplus food.

**10. Do you think the COVID-19 crisis has enhanced urban farming?**

All of the respondents in Sofia Region and the majority in the rest of regions suppose that COVID crisis has enhanced urban farming.

**11. Have you received any support by your local, regional or national government to sustain your activities during lockdowns (subsidy, information campaign, tax reduction...)?**

- ✓ Only in Bulgaria, more than half of the respondents say they received support from the authorities to maintain their city garden and activities during the lockdown.



Respondents report the following types of support and achievements: started an active dialogue between the Sofia Municipality and the civil organizations/relevant NGOs about the opportunities for development of urban farming. Under the influence of the crisis, the possibilities for a greener and more inclusive urban environment are being discussed and tested, e.g. in the scope of Sofia Green Program; comprehensive assistance and in-kind support by providing free compost and materials for urban agriculture (tools, seeds, etc.).

- ✓ In Greece and Spain, the majority haven't received any support, while some have such as, in Greece, free gardens by the municipality for cultivation and in Spain, a learning project financing for the cooperation area of the University transforming into an on-line event.
- ✓ In Portugal and Germany, none reported having received any support.

## **12. What are your recommendations to local authorities for support measures to urban farming?**

- ✓ In Bulgaria, although all measures were deemed necessary and supported, the top 3 include the following:
  - small grants to launch urban gardens;
  - better access to plots in urban areas (free or at preferential prices);
  - free use of water and electricity for urban gardens.
- ✓ In Greece, better access to plots in urban areas (free of charge or at low prices) is the most popular measure that local authorities should take to assist UF, following by free use of water and/or electricity and vouchers for advisory.
- ✓ In Portugal, the main recommendations are for free use of water and electricity and better access to plots in urban areas.
- ✓ In Spain, the top 3 include the following:
  - Better access to plots in urban areas (free or at preferential prices)
  - Vouchers for advisory/technical services
  - Rental schemes for basic infrastructure
- ✓ In Germany, most agreement with policy recommendations was: 1 (small grants to launch urban gardens), 2 (better access for households to plots in urban areas) and measure 7 (rental schemes for basic infrastructure).

## Conclusions on COVID's Impacts Surveys on Civil Society Organizations.

### Emerging trends based on the results

- ✓ For most of the survey respondents, the lockdown had neither a positive nor a negative impact on the development of the activity of the urban gardens.
- ✓ In Bulgaria and Germany, the vast majority experienced a positive development of the activity of the urban gardens after the lockdowns, while in Portugal and Spain they are less than half and there is no clear trend in Greece so far.
- ✓ In most of the regions (except Sofia Region), the majority of the participants report no change in cultivated plants in their allotments due to the crisis.
- ✓ In all regions, most of the respondents state that they have noticed an increased demand for fresh products.
- ✓ In all regions (except Central Macedonia Region), the majority of respondents reported having spent more hours working in the garden due to COVID crisis.
- ✓ In all regions (except Central Macedonia Region), most of the respondents have noticed an increase in the demand for allotments after the lockdowns.
- ✓ In all regions (with the exception of Central Macedonia), there is a clear trend of increased citizen's demand for participation in community gardens.
- ✓ In Bulgaria and Germany, most of the respondents report that they shared and/or donated part of their production during the lockdowns to their neighbors, hospitals, charity organizations, etc., while in Greece, Portugal and Spain the share of donated food is lower.
- ✓ All of the respondents in Sofia Region and the majority in the rest regions claim that COVID crisis has enhanced urban farming.
- ✓ Only in Bulgaria, more than half of the respondents say they have received support from the authorities to maintain their city garden and activities during the lockdowns, while in Greece and Spain, the majority haven't received any support and in Portugal and Germany, none reported having received any support.

### Main recommendations to local authorities for support measures

- ✓ Small grants to launch urban gardens and provision of better access to plots in urban areas (free or at preferential prices) are one of most demanded measures only in Bulgaria.
- ✓ Better access to plots in urban areas (free or at preferential prices) is one of the main recommendations in all region partners.
- ✓ Vouchers for advisory/technical services is one of the most demanded measures in Greece and Spain.

- ✓ Free use of water and electricity for urban gardens is one of the main recommendations in Bulgaria, Greece and Portugal.
- ✓ Rental schemes for basic infrastructure is one of the most demanded measures in Spain and Germany.

### **Other added recommendations to local authorities for support measures**

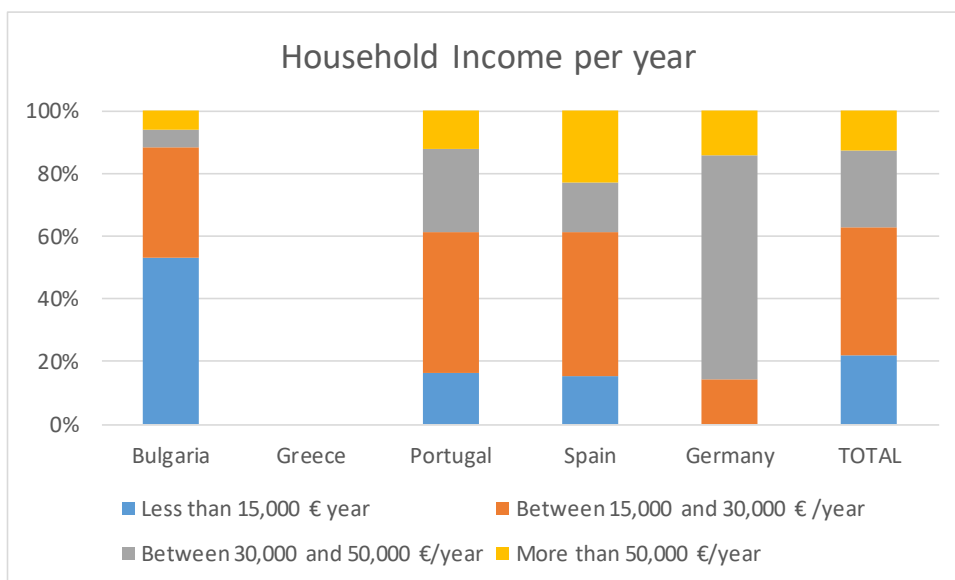
- ✓ In Bulgaria,
  - a regulatory framework to regulate urban farming;
  - more support to UF innovations so that it becomes accessible to households, office workers, startup businesses (incl. innovations related to vertical gardens, aquaponics, hydroponics, office buildings gardens);
  - mapping of public buildings suitable for roof gardens, as well as private buildings to offer their roof;
  - enhanced connections with schools, homes for the elderly, where fresh produce can be delivered/purchased. The municipality's role is essential in order to develop procedures
- ✓ In Spain,
  - Put agroecology at the center of public policies: pedagogy, urban-rural alliances, professional recognition and basic income for small productions;
  - Entrepreneurship support;
  - Free technical advice in the case of orchards carried out by Administrations.
- ✓ In Germany,
  - use public procurement (school catering etc.) in a targeted way to strengthen/build regional value chains and ensure nutritional education and to publicly fund some personnel for community and school gardens over a long time frame.

### 3. Responses by Citizens

#### 1. What is your household income per year?

<i>Citizens: Household income per year</i>					
	Less than 15,000 € year	Between 15,000 and 30,000 € /year	Between 30,000 and 50,000 €/year	More than 50,000 €/year	Total
<b>Bulgaria</b>	9	6	1	1	17
<b>Greece</b>					9
<b>Portugal</b>	8	22	13	6	49
<b>Spain</b>	2	6	2	3	13
<b>Germany</b>	0	1	5	1	7
<b>TOTAL</b>	19	35	21	11	<b>95</b>

No answer



**2. Have you changed your consumption of local products due to the COVID-19 crisis?**

- ✓ In Bulgaria and Germany, the majority of respondents share that they have neither increased nor decreased their consumption of regionally produced products as a result of the pandemic.
- ✓ In Greece, most reported an increase and none a decrease.
- ✓ In Portugal and Spain there is a similar trend: more than half of the respondents have increased their consumption and none report decrease.

**3. How was your purchase of food product on the internet during the lockdowns?**

- ✓ In Bulgaria, Portugal and Spain, most of the survey participants report no change in their consumer behavior and nearly 30% of the respondents answer that the lockdowns have led to an increase in their online food purchases.
- ✓ In Greece, more than half of the participants have increased their purchase of food products on internet during the lockdowns; and none have decreased.
- ✓ In Germany, respondents report remarkably little change regarding their food-related habits as a result of the COVID crisis.

**4. How was your purchase of food product on the internet after the lockdowns?**

- ✓ In Bulgaria, the majority of the respondents pointed out that there has been no change in their food online shopping after the lockdowns. Nearly 20% of the respondents answer that they have increased their online shopping as compared to the time before the pandemic.
- ✓ In Greece, more than half report no change and no one a decrease.
- ✓ In Portugal and Spain, most report to have no change, however for some minor part there was either increase or decrease.
- ✓ In Germany, respondents report remarkably little change in most of their food-related habits in the COVID crisis.

**5. Have you spent more time in open spaces after the lockdowns?**

- ✓ In Bulgaria, more than half of the respondents say that they spend more time outdoors after the lockdowns.
- ✓ In Greece, Portugal and Spain, it was the vast majority who spent more time in open spaces.

**6. Were there any basic food products you couldn't afford during the lockdowns?**

- ✓ In Bulgaria, most of the respondents answered that there were basic food products that they couldn't afford during lockdown (e.g. toiletries, beans, lentils, flour, oil and others).
- ✓ All of the respondents in Greece, Portugal and Germany report no difficulties to afford basic food during the lockdowns.
- ✓ In Spain, the vast majority could afford basic food products during lockdown.

**7. Did you practice urban farming before the COVID-19 crisis?**

- ✓ In Bulgaria and Spain most people respond that they did not practice urban agriculture before the crisis.
- ✓ In Greece, more than half practiced urban agriculture before the crisis.
- ✓ In Portugal, none of respondents practiced urban agriculture before the crisis.
- ✓ In Germany, most of the respondents practiced urban agriculture before the crisis.

**8. Have you practiced urban farming during the COVID-19 pandemic?**

- ✓ There is a slight increase in Bulgaria, Greece and Portugal.
- ✓ In Spain, there is a slight decrease as a result of the crisis.
- ✓ In Germany, most of the respondents practiced urban agriculture during the pandemic as before.

**9. Have you received home delivered of food during the lockdowns?**

In all regions, most people say that they did not change their frequency of home delivery of food products.

**10. Do you order farm food products to your house after the lockdowns?**

In all regions, there was no significant consumer behaviour change toward ordering farm food products more often to their house after the lockdowns.

**11. Have you been cooking food more often at home during the lockdowns?**

- ✓ In Bulgaria, nearly half have been cooking food more often at home during the lockdowns.
- ✓ In the rest of the regions, the majority of respondents say that they have been cooking food more often at home during the lockdowns.

**12. Would you like to receive local food products in your house even with an extra charge?**

- ✓ In Bulgaria and Spain, more than half would like to receive local food product in their house even with an extra charge.
- ✓ In Greece, less than half of the participants would like to.
- ✓ In Portugal, the majority of answers are positive.

**13. Have you received any support for your local, regional or national government to your household during the lockdown (financial aid, access to urban gardens, kits for home gardening...)?**

- ✓ None of the respondents received any support in Bulgaria, Portugal, Spain and Germany.
- ✓ In Greece, most didn't.

**14. What are your recommendations to local authorities for support measures to urban farming?**

All the proposed measures are of interest for respondents, distinguishing the following:

- ✓ In Bulgaria,
  - better access for households to plots in urban areas (free or with discounts);
  - free access to farmers' markets;
  - tax reduction for commercial UF.
  - rental schemes for basic infrastructure (composter, water tank, fence, toilet, etc.);
- ✓ In Greece,
  - free use of water and electricity for urban gardens;
  - small grants to launch urban gardens by neighborhoods;
  - better access for households to plots in urban areas (free or at prices with a discount).
- ✓ In Portugal,
  - better access for households to plots in urban areas (free or with discounts);

- tax reduction for commercial UF;
- rental schemes for basic infrastructure (composter, water tank, fence, toilet, etc.).
- ✓ In Spain,
  - small grants to launch urban gardens;
  - better access for households to plots in urban areas (free or with discounts);
  - free access to farmers' markets;
  - tax reduction for commercial UF;
  - rental schemes for basic infrastructure (composter, water tank, fence, toilet, etc.).
- ✓ In Germany,
  - small grants to launch urban gardens);
  - better access for households to plots in urban areas;
  - free use of water and electricity for urban gardens.

## Conclusions on COVID's Impacts Surveys on Citizens

### Emerging trends based on the results

- ✓ In Bulgaria and Germany, there are little changes in the consumption of local products due to the COVID crisis, while in Portugal and Spain more than half increase their consumption; in Greece the majority of the respondents did it.
- ✓ In Bulgaria, Portugal, Spain and Germany most report having no change in their purchase of food products on the internet during the lockdowns and after, while in Greece more than half increased it during the lockdowns and more than half hasn't changed their purchase after the lockdowns.
- ✓ In most regions, the majority spent out more time in open spaces after the lockdowns.
- ✓ The vast majority could afford basic food products during the lockdowns in all regions
- ✓ Most of the respondents didn't practice urban agriculture before the COVID crisis in Bulgaria, Portugal and Spain, while in Greece and Germany it is the opposite. During the pandemic, there are slight increases in Bulgaria, Greece and Portugal and slight decrease in Spain.
- ✓ In all regions, most say that they did not change their frequency of having home delivery of food products.
- ✓ In all regions concerned, except Sofia region, it seems that people have been cooking food more often at home during lockdown.
- ✓ In most of the regions the respondents tend to order local food products to their homes even with an extra charge.



- ✓ There was no household support during lockdown except in Greece.

### **Main recommendations to local authorities for support measures**

- ✓ All the proposed measures are matter of interest for respondents, distinguishing the following:
  - better access for households to plots in urban areas (free or with discounts);
  - tax reduction for commercial UF;
  - rental schemes for basic infrastructure (composter, water tank, fence, toilet, etc.);
  - small grants to launch urban gardens by neighborhoods.

### **Other added recommendations to local authorities for support measures**

- ✓ In Bulgaria, the participants in the survey complement the list with the following recommendations and comments to urban farming (UF) managing authorities:
  - support for innovative business solutions in production, incl. social innovations;
  - promotion and incentives for the use of already existing innovative solutions and systems for urban agriculture (e.g. aquaponics, aeroponics, hydroponics);
  - creation of digital maps indicating available plots/opportunities for urban farming;
  - need of regulation of urban farming, incl. go-to-market for hobby farmers and realization of surplus produce at household level;
  - creation of platforms for trade and donations of surplus produce;
  - more information campaigns with regard to UF;
  - active search for opportunities for landscaping of public and business buildings (e.g. rooftop gardens and indoor vertical gardens);
  - continuous promotion of community gardens as a means of hobby and recreation places for citizens;
  - development of policy capacity building and business accelerator programs to support innovative business solutions in urban farming.
- ✓ In Germany a need for “education about existing projects and opportunities for participation” was mention as addition.

## GENERAL CONCLUSIONS

- ✓ The information gathered is of value to CityZen project, as it gives a general overview of the situation for three main actors involved in urban farming during and after lockdowns due to COVID-19 pandemic.
- ✓ We can speak only about certain possibly emerging trends as there were a small number of respondents that replied, which is not enough for a representative sample.
- ✓ In relation to businesses, there are different common trends between the regions regarding the demand for certain food products, the teleworking for employees, food delivered to household, demand for fresh product during and after the lockdowns, changes in food prices and the emergence of innovative business models in urban farming.
- ✓ For all, there is no clear change in the demand for local product and in food e-commerce, as business and citizens have different perceptions.
- ✓ Upward trend in the demand in ready-to-eat food during and after the lockdowns and in redesigning business supply chains.
- ✓ In all regions, there is no change in imports of food products.
- ✓ For most, the lockdowns had neither a positive nor a negative impact on the development of the activity of urban gardens.
- ✓ There is a positive development of the activity of urban gardens after lockdown in all regions except Central Macedonia, where there is no clear trend.
- ✓ In most of the regions (except Sofia Region) and for the majority there was no change in cultivated plants due to the COVID crisis.
- ✓ In relation to civil society organizations, in all regions, there is an increased demand for fresh products.
- ✓ All regions (with the exception of Central Macedonia), the majority of respondents reported having spent more hours working in the garden due to COVID crisis and have noticed an increase in the demand for allotments after the lockdowns and an increase of citizen's demand for participation in community gardens.
- ✓ In all regions, some or most of the respondents report that they shared and/or donated part of their production during the lockdowns to neighbors, hospitals, charity organizations, etc.
- ✓ Among civil society organizations, in all regions, there is a perception that COVID crisis has enhanced urban farming.
- ✓ In most regions, the majority spent more time in open spaces after the lockdowns.
- ✓ The vast majority could afford basic food products during lockdown in all regions.
- ✓ There is not a clear upward trend in practicing urban agriculture during the pandemic.

- ✓ In all regions, there is a trend of no changing the frequency of home delivery of food products.
- ✓ In all regions it seems that people have been cooking food more often at home during the lockdowns.
- ✓ Quite remarkable is that in most regions business didn't receive any support by local, regional or national government, except Central Macedonia where about half of business did. In regards to civil society organizations, it is Sofia region where the majority of respondents have received some support, while in the rest of the regions only a minority or none of the respondents have.
- ✓ There was no household support during the lockdowns except in Central Macedonia.
- ✓ As highly remarkable information, the respondents pointed out recommendations to policy makers and local authorities in order to improve the urban farming ecosystem. This way, each actor from each region found different measures relevant, such as:
  - Better access to plots in urban areas (preferred by business in Bulgaria and Germany and by civil society in all regions);
  - Small grants for urban gardens (preferred by business in Bulgaria, Greece and Portugal by civil society organizations in Bulgaria and by citizens in all regions);
  - Rental schemes for basic infrastructure (preferred by civil society organizations in Spain and Germany and by citizens in all regions)
  - Free access to farmer's markets (preferred by business in Spain and Germany);
  - Tax reduction for commercial urban farming (preferred by business in Bulgaria, Greece and Portugal and by citizens in all regions);
  - Free use of water and electricity for the gardens (preferred by business in Bulgaria, Portugal and Germany and by civil society organizations in Bulgaria, Greece and Portugal);
  - Vouchers for advisory/technical services (preferred by business and civil society organizations in Germany and by civil society organizations in Spain);
  - Better access for households to plots in urban areas (by citizens).
- ✓ Each group of respondents made other recommendations to local authorities for support measures.