



**EUROGROUP
FOR ANIMALS**

BROILER CHICKEN WELFARE RESEARCH FOR EUROGROUP FOR ANIMALS

EUROPEAN REPORT

MARCH 2019



EXECUTIVE SUMMARY

The European Union (EU) is one of the world's top producers in poultry meat, and every year, around 6 billion broiler chickens are raised for meat in the EU.¹ The poultry sector in the EU is characterised by intensification, a phenomenon whereby only a small number of specialised and highly industrialised broiler farms produce the majority of chicken meat on the EU market. Although farms raising more than 5,000 broilers only represent 1% of the overall number of broiler farms, they account for an overwhelming 93.5% of poultry meat production,² making of the poultry sector one of the most intensified sectors in EU animal agriculture. EU broiler production is also expected to grow in the future³ due to consumer demand for affordable meat.⁴

Most broiler chickens are intensively farmed, bred for rapid muscular growth and slaughtered within an average of 42 days.⁵ There are a number of concerns regarding the conditions under which broiler chickens are reared and the impact that these conditions have on their health, behaviour and welfare. Concerns include the poor quality of air, light and space, mutilations, no access to the outdoors, rapid spread of disease, mishandling during catching and transport, as well as inhumane slaughter methods.

The research was conducted in the top six largest producers of poultry meat in the EU: the UK, France, Germany, Spain, Italy, and Poland, as well as Belgium. These six countries represent more than 70% of EU production⁶ and concentrate more than three quarters of the farms with more than 5,000 broilers.⁷ Nearly all (96%) respondents across the seven European countries included in this research say that they eat chicken, with two thirds (66%) saying they eat chicken once a week or more.

The majority of respondents agree that broiler chickens are sentient (70%) and that they are intelligent (61%), and also think it is important that they live in a clean environment (89%) and in a suitable environment with enough light and space to behave naturally (roam around, spread their wings and forage) (87%). The vast majority of respondents also believe that it is important that broilers have access to a covered or uncovered outdoor area (85%) and are humanely slaughtered (86%).

Respondents are also aware of the inhumane conditions in which broiler chickens are raised on industrial farms. Five in six (86%) respondents think that broiler chickens at least sometimes live in overcrowded conditions and 80% think that broiler chickens at least sometimes suffer from poor health due to rapid growth. However, more than half (57%) of respondents wrongly assume that broiler chickens at least sometimes have access to the outdoors on industrial farms in the EU.

¹ European Commission, Overview Report: Use of Slaughterhouse Data to Monitor Welfare of Broilers on Farms, DG Health and Food Safety, p.1, 2016 (DG Sante 2016-8999).

² In 2010. European Commission, Eurostat, Statistics Explained, available at: https://ec.europa.eu/eurostat/statistics-explained/index.php/Meat_production_statistics_-_Poultry_meat .

³ European Commission, EU Production of Broiler, Expert Forecast January 2019, available at: <https://circabc.europa.eu/sd/a/cdd4ea97-73c6-4dce-9b01-ec4fdf4027f9/24.01.2019-Poultry.pdf>

⁴ P. Magdalaine, M.P. Spiess and E. Valeschini, Poultry Meat Consumption Trends in Europe, World's Poultry Science Journal, vol. 64, March 2008.

⁵ European Commission, Overview Report: Use of Slaughterhouse Data to Monitor Welfare of Broilers on Farms, DG Health and Food Safety, p.1-2, 2016 (DG Sante 2016-8999).

⁶ European Commission, Poultry Meat dashboard - Market dashboard, p. 9, available at: https://ec.europa.eu/agriculture/sites/agriculture/files/dashboards/poultry-meat-dashboard_en.pdf.

⁷ European Commission, Eurostat, Statistics Explained, available at: https://ec.europa.eu/eurostat/statistics-explained/index.php/Meat_production_statistics_-_Poultry_meat .

Furthermore, three in ten (31%) of respondents say that they don't know whether broiler chickens are raised under higher or lower animal welfare standards inside of the EU, compared to outside of the EU. Although imports from countries outside of the EU only represent 6% of poultry products on the EU market,⁸ the knowledge gap on methods of poultry production abroad is problematic given that standards are generally lower in the EU's top importers of poultry meat.⁹

In light of what respondents know to be important for broiler chicken welfare, and even though they are not fully informed on the conditions in which broiler chickens are raised on industrial farms, respondents know enough to express the desire for improved animal welfare legislation higher quality consumer information. Nine in ten (89%) respondents agree that the welfare of broiler chickens raised for meat should be better protected than it is now. When asked how best to do this, setting higher legal welfare standards for broiler chickens was identified as the top priority for governments by nearly half (46%) of European adults, indicating that animal welfare regulations still considerably lag behind citizens' desire for better animal welfare laws.

Considering over half (55%) of respondents describe their diet as meat eater/omnivore and nearly all (96%) respondents say they eat chicken, there is clear support for EU legislation on improved labelling and welfare standards amongst both those who do and do not eat chicken. Approaching nine in ten (87%) of respondents also agree that chicken sold in the EU should be labelled with information about the welfare standards they were raised under and a similar proportion (89%) agree that it should be labelled by country of origin.

Furthermore, the majority (62%) of respondents say they prefer to buy ethically sourced chicken (organic, free range, animal welfare certified and locally-sourced origin), indicating a large appetite for higher legal standards.

Three quarters (78%) of respondents report experiencing one or more barriers when choosing vegetarian and vegan substitutes for chicken. A majority (61%) of respondents say they encounter barriers under the form of high cost, concern about getting protein or a balanced diet, taking too long to prepare as well as lack of awareness, information and availability. Therefore, work could be done to help remove these barriers, through better nutritional information and better availability at retail points of sale.

This research has highlighted the widespread recognition amongst respondents of the need to improve the EU legislation on the welfare of broiler chickens and consumer information on the country of origin of broiler meat and the welfare standards broilers were raised under. The shift in consumption patterns towards the increased demand for non-caged eggs following the mandatory labelling of methods of production for eggs in the EU¹⁰ suggests that the labelling of animal welfare standards could similarly improve the welfare of broiler chickens by empowering Europeans to make informed decisions and create a shift away from cruel to more humane production methods. Whilst voluntary labelling schemes exist, this survey finds that there is significant support for legislative progress to be made in the EU to improve the welfare and labelling standards amongst other farmed animals, including broiler chickens.

⁸ Number based on data of consumption of poultry meat in the EU – 28 by the OECD in tons and the number of tons imported in the EU – 28 by the European Commission.

⁹ Brazil, Ukraine, Thailand, Chile and Argentina are the EU's top sources of import for poultry meat. Of these countries, only Thailand has specific regulations for the welfare of broiler chickens.

¹⁰ European Parliament, The Poultry and Egg Sectors: Evaluation of the Current Market Situation and Future Prospects, p. 24, 2010. Since the 2008 EU Regulation on the mandatory labelling of methods of production of shell eggs, the portion of laying hens kept in alternative systems (non-caged) keeps increasing (source: Eurogroup for Animals, Optimising Laying Hen Welfare in Cage-Free Systems, p. 38, 2018).

METHODOLOGY

ComRes conducted an online quantitative survey in which respondents were interviewed about their current understanding about broiler chicken welfare. We interviewed 7,090 adults in seven European countries (UK, France, Germany, Spain, Italy, Belgium and Poland) aged 18+ online between 9th January and 22nd February 2019. Data were weighted to be representative of adults aged 18+ by age, gender and region in each of the seven countries.

The European markets were chosen to ensure the results took into account the variety of countries within the European Union (EU) in terms of geography, political history and culture. While the combined results cannot be representative of the EU as a whole, they represent a range of opinions that can be found within the EU.

Guidelines for the public use of survey results

ComRes is a member of the British Polling Council¹¹ and abides by its rules. This commits us to the highest standards of transparency.

The BPC's rules state that all data and research findings made on the basis of surveys conducted by member organisations that enter the public domain must include reference to the following:

- The company conducting the research (ComRes)
- The client commissioning the survey
- Dates of interviewing
- Method of obtaining the interviews (e.g. in-person, post, telephone, internet)
- The universe effectively represented (all adults, voters etc.)
- The percentages upon which conclusions are based
- Size of the sample and geographic coverage.

Published references (such as a press release) should also show a web address where full data tables may be viewed, and they should also show the complete wording of questions upon which any data that has entered the public domain are based.

All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.

¹¹ www.britishpollingcouncil.org

FINDINGS IN DETAIL

Q1. Which of the following terms would you say best describes your diet?

	All %
Meat eater/omnivore	55%
NET: Respondents with a reduced intake of animal products¹²	21%
Reduцetarian	6%
Vegetarian	5%
Flexitarian	5%
Dairy-free	2%
Pescatarian	1%
Vegan	1%
I do not describe my diet as any of these	23%
Other, please specify	2%

Base: All respondents (n=7,090)

- Over half (55%) of respondents across the seven European countries describe their diet as **meat eater/omnivore**, with Italian and German adults most likely to describe it in this way (65% and 63% respectively).
- Polish and German adults are more likely to describe their diet as **reducetarian** compared to other countries tested (24% and 13% respectively).
- One in twenty (5%) respondents describe their diet as **vegetarian**.
 - Adults from the UK are more likely to describe their diet as vegetarian compared to other countries tested (8% vs 2%–6%).
 - Respondents aged 18–34 are also more likely to describe their diet as vegetarian compared to those aged 35–54 and 55+ (8% vs 4% and 3%).
- Approaching one quarter (23%) of respondents say that they **do not describe their diet using any of the terms** tested, suggesting that there is some misunderstanding of what these terms mean.
 - Out of the countries tested, French adults are most likely to say they do not describe their diet using any of the terms (35%) and Polish adults are least likely to say this (9%).

¹² This NET includes all respondents who selected one of the following diets: vegetarian, vegan, reduцetarian, pescatarian, flexitarian or dairy-free.

Q2. How often, if at all, do you eat chicken?

	All %
NET: Those who eat chicken	96%
NET: Once a month or more	92%
NET: Once a week or more	66%
Every day or almost every day	10%
At least once a week	57%
2-4 times a month	20%
Once a month	6%
Less than once a month	3%
Never	4%

Base: All respondents (n=7,090)

- Nearly all (96%) respondents across the seven European countries say that they eat chicken. Two thirds (66%) of respondents report that they eat chicken once a week or more and one in ten (10%) respondents say they eat chicken every day or almost every day.
- There are some variations apparent between the seven EU countries tested:
 - Belgian, Spanish and Polish adults are most likely to say that they eat chicken compared to other countries (98%, 97%, 97%).
 - Whilst respondents in the UK are least likely to say that they eat chicken, this is still a significant proportion with nine in ten (91%) saying this.
 - Spanish adults are most likely to say that they eat chicken once a week or more (83%), with German adults least likely to say this (49%).
 - Adults from Spain, Poland and the UK are all more likely to say they eat chicken every day or almost every day (15%, 13%, 13% respectively), compared to other countries tested (from 6% to 8%).
- Respondents aged 55+ are less likely than those aged 18-34 and 35-54 to say that they eat chicken once a week or more (62%, 69%, 69%). They are also less likely to say that they eat chicken every day or almost every day (4%, 18%, 10% respectively).
- Three quarters (75%) of respondents who describe their diet as one with a reduced intake of animal products¹³ say they eat chicken once a month or more. Furthermore, over two in five (43%) respondents who describe their diet as vegan¹⁴ eat chicken once a month or more, suggesting some confusion about the term or a degree of flexibility within diet types.

¹³ Respondents with a reduced intake of animal products include those who describe their diets with the following terms: vegetarian, vegan, pescatarian, reducetarian, flexitarian and dairy-free.

¹⁴ Please exercise caution when interpreting these results as there is a relatively low base size for respondents who describe their diet as vegan (n=96).

Q3. Which of the following, if any, best describes your preference when buying chicken to eat?

	All %
NET: Those who say they prefer to buy ethically sourced chicken¹⁵	62%
I prefer to buy free-range chicken	25%
I do not have any preferences when buying chicken	20%
I prefer to buy locally sourced chicken	16%
I prefer to buy animal welfare certified chicken	12%
I prefer to buy the cheapest chicken on offer	10%
I prefer to buy organic chicken	9%
I have another preference when buying chicken that is not listed	1%
Not applicable, I do not buy chicken to eat	4%
Don't know	3%

Base: All respondents (n=7,090)

- Three in ten (62%) respondents across the seven European countries say they prefer to buy **ethically sourced chicken**.
- One quarter (25%) of respondents prefer to buy **free-range chicken**. French and Polish adults are most likely to say they prefer to buy free-range chicken (35% and 33%), with German adults least likely (13%).
- One in five (20%) respondents **do not have any preferences** when buying chicken.
 - Adults from the UK, Spain and Belgium are most likely to **not** have any preferences (27%, 26%, 26%), with adults from France the least likely to **not** have any preferences when buying chicken (8%).
 - Older respondents are also more likely than younger respondents to **not** have any preferences when buying chicken (those aged 55+ 22%, 35–54 21%, 18–34 16%).
- One in six (16%) respondents say they prefer to buy **locally sourced chicken**.
 - Out of the countries tested, German and Italian adults are the most likely (both 21%) and Polish adults are the least likely to state this preference (8%).
 - Respondents who describe their diet as pescatarian (26%) are more likely than most other diet types tested to say they prefer to buy locally sourced chicken (e.g. 10% of vegetarians and vegans, 17% of meat eaters/omnivores).
- Respondents who say they know a fair/great amount about the welfare of chickens raised for meat in the EU are more likely than those who say they know little or nothing to prefer to buy ethically sourced chicken (75% vs 56%).

¹⁵ This NET includes all respondents who selected one or more of the following options: I prefer to buy organic chicken, animal welfare certified chicken, free-range chicken or locally sourced chicken.

- Furthermore, respondents who say they know a fair/great amount about chicken welfare are more likely than those who say they know little or nothing to prefer to buy free-range chicken (28% vs 24%), locally-sourced chicken (18% vs 15%), animal welfare certified chicken (16% vs 10%), and organic chicken (13% vs 7%).
- In addition, respondents who know little or nothing about chicken welfare are more likely than those who know a fair/great amount to not have any preferences when buying chicken (25% vs 10% respectively).

Q4. Which of the following, if any, are barriers to you choosing a vegetarian or vegan substitute for chicken?

	All %
NET: Any barrier	78%
Not as appealing as chicken, in terms of appearance, taste and texture	27%
I am not aware of vegetarian or vegan substitutes	17%
Too expensive	17%
Not enough information about chicken substitutes	14%
Concern about getting protein/balanced diet	11%
Not readily available to me	9%
Takes too long to prepare	4%
Other, please specify	2%
There are no barriers to me choosing a vegetarian or vegan substitute for chicken	13%
Don't know	8%

Base: All respondents (n=7,090)

- Nearly four in five (78%) respondents say they **experience one or more barriers** in choosing a vegetarian or vegan substitute for chicken.
- Over one quarter (27%) of respondents across the seven European countries say that vegetarian or vegan substitutes are **not as appealing as chicken, in terms of appearance, taste and texture**, creating a barrier to them choosing these options a substitute for chicken.
 - Out of the countries tested, adults from the UK and Italy are the most likely to say that this is a barrier (35% and 32% respectively).
- One in six (17%) respondents say that vegetarian or vegan substitutes for chicken are **too expensive**, creating a barrier to them choosing these alternatives.
 - Adults from Belgium are most likely to say that this is a barrier (21%), whilst Italian adults are least likely to say that this is a barrier (11%).
- One in six (17%) respondents say that they are **not aware of vegetarian or vegan substitutes**. Respondents who say they know a little/nothing about the welfare of chickens raised for meat in the EU are more likely than those who say they know a fair/great amount to report being unaware of vegetarian or vegan substitutes (21% vs 11%).
- Out of the countries tested, Polish and Spanish adults are most likely to say that there is not enough information about chicken substitutes (21% and 17%) and that they are not aware of vegetarian or vegan substitutes (30% and 21%).

- Polish, Spanish and Belgian adults are also most likely to say that that vegetarian and vegan substitutes are not readily available to them (15%, 11% and 12%).
 - On the other hand, Polish and Spanish adults are least likely to say that vegetarian or vegan substitutes are not as appealing as chicken, in terms of appearance, taste and texture (both 20%).
- Over one in ten (13%) respondents say that there are **no barriers** to them choosing a vegetarian or vegan substitute for chicken. Adults from the UK and Germany are the most likely countries to say this (21% and 18%).
 - Younger adults aged 18–34 are more likely than those aged 34–54 and 55+ to say that:
 - vegetarian or vegan substitutes for chicken are **too expensive** (21%, 19%, 13%);
 - they are concerned about getting **protein or a balanced diet** (16%, 10%, 8%);
 - vegetarian or vegan substitutes are **not readily available to them** (12%, 9%, 6%)
 - and that vegetarian or vegan substitutes **take too long to prepare** (7%, 4%, 2%).
 - Conversely, those aged 35–54 and 55+ are more likely than those aged 18–34 to say that they are not aware of vegetarian or vegan substitutes (16%, 23%, 10% respectively).
 - There are variations in experiencing barriers between the different diet types:
 - Respondents who describe their diet as reductarian, dairy-free or meat eater/omnivore are more likely than other diet types to experience any of the barriers tested (86%, 85%, 81%).
 - Amongst reductarians, a higher proportion say that the lack of information about chicken substitutes is a barrier (24%).
 - Notably, vegetarians and vegans¹⁶ still experience one or more of the barriers tested despite being most likely to consume vegetarian or vegan substitutes (59% and 60% respectively) suggesting that more could be done to alleviate these barriers.

¹⁶ Please exercise caution when interpreting these results as there is a relatively low base size for respondents who describe their diet as vegan (n=96).

Q5. How much, if anything, do you know about the welfare of chickens raised for meat in the EU?

	All %
NET: A fair/great amount	33%
NET: A little/ nothing at all	67%
A great deal	7%
A fair amount	25%
A little	48%
Nothing at all	19%

Base: All respondents (n=7,090)

- Two thirds of (67%) respondents across the seven European countries tested say that they know a little or nothing at all about the welfare of chickens raised for meat in the EU.
- Respondents with a reduced intake of animal products are more likely than meat eaters/omnivores to say that they know a fair/great amount about the welfare of chickens raised for meat in the EU (47% vs 30% respectively).
 - Proportions of respondents saying they know a fair/great amount about chicken welfare range from 39% among flexitarians to 73% among vegans.
 - Three quarters of respondents who describe their diet as vegan¹⁷ (73%) and over half of respondents who describe their diet as either vegetarian (56%) or pescatarian¹⁸ (54%) say they know a fair/great amount about the welfare of chickens raised for meat in the EU compared to three in ten meat eaters/omnivores (30%).
- Out of the countries tested, French adults are most likely to say they know a fair/great amount about the welfare of chickens raised for meat in the EU (42%), whilst Spanish adults are least likely (19%).
- Respondents aged 18–34 are most likely to say they know a fair/great amount about the welfare of chickens raised for meat in the EU (40%), compared to those aged 35–54 (33%) and 55+ (27%).
- Respondents who are educated up to school level (29%) are less likely than those who are educated beyond school (38%) to say they know a fair/great amount about the welfare of chickens raised for meat in the EU.

¹⁷ Please exercise caution when interpreting these results as there is a relatively low base size for respondents who describe their diet as vegan (n=96).

¹⁸ Please exercise caution when interpreting these results as there is a relatively low base size for respondents who describe their diet as pescatarian (n=101).

Q6. To what extent do you agree or disagree with the following statements?

	NET: Agree	Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	NET: Disagree	Don't know
Chickens do not feel pain	9%	4%	6%	21%	63%	83%	7%
Chickens are sentient, i.e. have the capacity to feel, perceive or experience subjectively	70%	28%	42%	13%	5%	18%	12%
Chickens are not intelligent	26%	7%	19%	33%	27%	61%	14%

Base: All respondents (n=7,090)

- While one in ten (9%) respondents across the seven European countries agree that **chickens do not feel pain**, over eight in ten (83%) respondents disagree.
 - Respondents aged 18–34 are more likely to agree that chickens do not feel pain compared to those aged 35–54 and 55+ (15%, 10%, 6% respectively).
- Seven in ten (70%) respondents agree that **chickens are sentient, i.e. have the capacity to feel, perceive or experience subjectively**, with three in ten (28%) agreeing strongly and two in ten (18%) disagreeing.
 - Out of the countries tested, German adults are most likely to agree with this statement (79%) and Polish adults are most likely to disagree (32%).
 - Respondents aged 18–34 are more likely to disagree with this statement compared to those aged 35–54 and 55+ (21%, 18%, 17%).
 - Respondents who are educated beyond school level are more likely to disagree with this statement than those who are educated up to school level (20% vs 17%).
- Three in five (61%) respondents disagree that **chickens are not intelligent**, with one quarter (26%) of respondents agreeing.
 - Out of the countries tested, Polish and Spanish adults are most likely to agree that chickens are not intelligent (35% and 33% respectively).
 - French, German and Belgian adults are most likely to strongly disagree that chickens are not intelligent (35%, 31%, 31% respectively).
 - Respondents aged 18–34 are more likely to agree that chickens are not intelligent compared to those aged 35–54 and 55+ (30%, 25%, 24%).
 - Respondents who are educated beyond school level are more likely to agree that chickens are not intelligent compared to those who are educated up to school level (29% vs 23%).
 - Respondents with a reduced intake of animal products are more likely to disagree that chickens are not intelligent compared to respondents who describe themselves as a meat eater/omnivore (66% vs 61%).

Q7. How important or unimportant are each of the following to you when chickens are raised for meat?

	NET: Important	5- Very important	4	3	2	1 - Very unimportant	NET: Unimportant
Are healthy and free from illness or disease	90%	74%	16%	8%	2%	1%	2%
A clean environment, with unpolluted air, clean litter, free from disease	89%	68%	21%	9%	1%	1%	2%
A suitable environment to behave naturally with access to natural light and enough space to roam around, spread their wings and forage	87%	65%	22%	10%	2%	1%	3%
Are slaughtered using a humane (i.e. quick and painless) method	86%	67%	19%	10%	2%	2%	3%
Access to a covered or uncovered outdoor area	85%	60%	25%	12%	2%	1%	3%
Are able to enjoy their lives without suffering	82%	59%	23%	14%	3%	1%	4%

Base: All respondents (n=7,090)

- Among the statements tested, respondents across the seven European countries say that it is most important that chickens raised for meat are **healthy** and free from illness or disease (90%) and are raised in a **clean environment**, with unpolluted air, clean litter, free from disease (89%).
- Some variations exist between countries where:
 - Spanish (73%) adults are least likely to say that it is important to them for chickens to be able enjoy their **lives without suffering**.
 - Italian (91%), French (89%) and Polish (88%) adults are more likely than those from other countries tested to say that it is important to them for chickens to have **access to a covered or uncovered outdoor area**.
- Younger adults are consistently less likely than older adults to say that **all the above conditions** are important to them, however they still place a high level of importance on the statements. For example, eight in ten respondents aged 18–34 (79%) and 35–54 (83%) say that it is important to them for broiler chickens to have access to a covered or uncovered outdoor area, compared to nine in ten respondents aged 55+ (91%).

Q8. How often, if at all, do you think that chickens raised for meat in industrial farms in the EU are subject to the following conditions?

	NET: At least some-times	NET: Rarely/ Never	Always	Often	Some-times	Rarely	Never	Don't know
Live in overcrowded conditions	86%	7%	18%	48%	20%	5%	3%	7%
Suffer from poor health due to rapid growth	80%	9%	12%	41%	27%	6%	3%	11%
Suffer mutilations	72%	13%	9%	36%	28%	9%	4%	15%
Grow up on the same farm where they were born	68%	18%	14%	30%	23%	15%	4%	14%
Have outdoor access	57%	36%	8%	15%	34%	30%	6%	7%

Base: All respondents (n=7,090)

- There is little consensus on the frequency at which chickens raised for meat in industrial farms in the EU are subject to each of the conditions tested.
- Approaching nine in ten (86%) respondents across the seven European countries think that chickens raised for meat in industrial farms in the EU at least sometimes **live in overcrowded conditions**, with nearly one in five (18%) thinking that chickens raised for meat in the EU always live in overcrowded conditions. Only 7% of respondents think that chickens raised for meat in the EU rarely or never live in overcrowded conditions.
 - Out of the countries tested, adults from the UK (77%) and Spain (79%) are least likely to think that chickens raised for meat in industrial farms in the EU at least sometimes live in overcrowded conditions.
 - Respondents aged 18–34 are also less likely than those aged 35–54 and 55+ to think that chickens raised for meat in industrial farms in the EU at least sometimes live in overcrowded conditions (83%, 86%, 88%).
- Four in five (80%) respondents think that chickens raised for meat in industrial farms in the EU at least sometimes **suffer from poor health due to rapid growth**. Only one in ten (9%) of respondents think that chickens raised for meat rarely or never suffer from poor health due to rapid growth.
 - Out of the countries tested, Polish (87%), Italian (85%) and French (84%) adults are most likely to think that chickens raised for meat in industrial farms in the EU at least sometimes suffer from poor health due to rapid growth.

- Respondents with a reduced intake of animal products are more likely than meat eaters or omnivores to think that chickens raised for meat in industrial farms in the EU at least sometimes suffer from poor health due to rapid growth (86% vs 80%).
- Seven in ten (72%) respondents think that chickens raised for meat in industrial farms in the EU at least sometimes **suffer mutilations**, with one in ten (9%) respondents thinking this always happens. Notably, one in six respondents don't know how frequently chickens raised for meat in industrial farms in the EU suffer mutilations (15%).
 - Out of the countries tested, French adults are most likely to think that chickens raised for meat in industrial farms in the EU always suffer mutilations (13%). Polish adults are most likely to say that chickens often suffer mutilations (51%), while Spanish adults are most likely to say that chickens rarely or never suffer mutilations (24%).
 - Respondents with a reduced intake of animal products are more likely than meat eaters or omnivores to think that chickens raised for meat in industrial farms in the EU at least sometimes suffer mutilations (80% vs 71%).
- Seven in ten respondents think that chickens raised for meat in industrial farms in the EU at least sometimes **grow up on the same farm where they were born** (68%). Around one in six think that they always grow up on the same farm where they were born (14%) or don't know (14%).
 - When asked about the frequency in which chickens raised for meat in industrial farms in the EU grow up on the same farm where they were born, Spanish adults are most likely to say this always occurs (20%); Polish adults are most likely to say this often occurs (44%); German and Belgian adults are most likely to say this rarely or never occurs (both 24%); and UK adults are most likely to say they don't know (20%).
 - Respondents aged 18–34 are more likely than those aged 35–54 and 55+ to say that chickens raised for meat in industrial farms in the EU at least sometimes grow up on the same farm where they were born (72%, 67%, 65% respectively).
- Over one third (36%) of respondents think that chickens raised for meat in industrial farms in the EU rarely or never **have outdoor access**, with approaching three in five (57%) respondents thinking that the chickens at least sometimes have outdoor access.
 - Adults from the UK are least likely to say that chickens raised for meat in industrial farms in the EU rarely or never have outdoor access (22%), compared to the other countries tested (ranging from 35% to 43%).
 - Respondents aged 18–34 are more likely than those aged 35–54 and 55+ to say that chickens raised for meat in industrial farms in the EU at least sometimes have outdoor access (60%, 56%, 56% respectively).

Q9. To what extent do you agree or disagree that the welfare of chickens raised for meat should be better protected than it is now?

	All %
NET: Agree	89%
Strongly agree	55%
Tend to agree	35%
Tend to disagree	4%
Strongly disagree	1%
NET: Disagree	5%
Don't know	6%

Base: All respondents (n=7,090)

- Nine in ten (89%) respondents across the seven European countries agree that the welfare of chickens raised for meat should be better protected than it is now, with more than half (55%) strongly agreeing.
- Out of the seven countries tested, adults from the UK and Belgium are least likely to agree (84% and 85%), and Polish and Italian (both 93%) are most likely to agree that the welfare of chickens raised for meat should be better protected than it is now.
- Respondents aged 55+ are more likely to agree with this statement, compared to those aged 18–34 and 35–54 (92%, 86%, 88% respectively).
- Flexitarians and reducetarians are more likely to agree with this statement than those with other diets (95% and 93%). Meat eaters / omnivores and those with a reduced intake of animal products are equally likely to agree (both 90%).

Q10. Which of the following, if any, best describes your point of view?

	All %
Chickens raised outside of the EU are raised by lower animal welfare standards than inside the EU	47%
Chickens raised outside of the EU are raised by the same animal welfare standards as inside the EU	13%
Chickens raised outside of the EU are raised by higher animal welfare standards than inside the EU	10%
Don't know	31%

Base: All respondents (n=7,090)

- Approaching half (47%) of respondents across the seven European countries say that chickens raised outside of the EU are raised by lower animal welfare standards than inside the EU. Notably, three in ten (31%) respondents say they don't know.
- Out of the countries tested, German, French, Belgian and Italian adults are most likely to say that chickens raised outside of the EU are raised by lower animal welfare standards than inside the EU (52%, 51%, 51%, 51% respectively).
- Respondents aged 55+ are more likely than those aged 18–34 and 35–54 to say that chickens raised outside of the EU are raised by lower animal welfare standards than inside the EU (50%, 42%, 46% respectively).
- Respondents who are educated beyond school level are more likely than those who are educated up to school level to say that chickens raised outside of the EU are raised by lower animal welfare standards than inside the EU (50% vs 45%).

Q11. To what extent do you agree or disagree that the government should improve the laws setting the welfare standards of chickens raised for meat?

	All %
NET: Agree	86%
Strongly agree	49%
Tend to agree	37%
Tend to disagree	5%
Strongly disagree	1%
NET: Disagree	7%
Don't know	7%

Base: All respondents (n=7,090)

- Approaching nine in ten (86%) respondents across the seven European countries agree that the government should improve the laws setting the welfare standards of chickens raised for meat, with half (49%) strongly agreeing.
- There is some variation between the seven countries about whether the government should improve the laws setting the welfare standards of chickens raised for meat. This ranges from 81% agreement in Belgium to 90% agreement in Italy.
- Respondents aged 55+ are more likely than those aged 18–34 and 35–54 to agree that the government should improve the laws setting the welfare standards of chickens raised for meat (90%, 81%, 86% respectively).

Q12a & Q12b.¹⁹ Which of the following, if any, do you think the government should prioritise when improving the welfare standards of chickens raised for meat? You mentioned that you think the following should be government priorities when improving the welfare standards of chickens raised for meat, please rank which you think are most important.

	Ranked as the top priority	Ranked as a top three priority
Set higher legal welfare standards for raising chickens for meat (e.g. limit overcrowding, guarantee access to outdoors, quick and painless slaughter)	46%	58%
Set higher food safety standards	16%	36%
Set higher environmental standards	14%	38%
Guarantee a fair income to farmers	14%	32%
None of the above	1%	1%
Don't know	7%	7%

Base: All respondents (n=7,090)

- Three in five (58%) respondents across the seven European countries say that **setting higher legal welfare standards** (e.g. limit overcrowding, guarantee access to outdoors, quick and painless slaughter) should be a top three priority for government when improving the welfare standards of chickens raised for meat.
 - Polish adults are less likely to say this (50%) compared to adults from other countries tested (ranging from 56% in France and Belgium to 64% in Germany).
 - Respondents aged 55+ (62%) are more likely those aged 18–34 and 35–54 to say this (62%, 54%, 58% respectively).
- Two in five (38%) respondents say that setting **higher environmental standards** should be a top three priority for government when improving the welfare standards of chickens raised for meat.
 - Adults from the UK and France are more likely to say this (both 43%), compared to adults from other countries tested (ranging from 29% in Belgium to 38% in Poland and Italy).
 - Respondents aged 55+ are more likely those aged 18–34 and 35–54 to say this (41%, 34%, 36% respectively).
- Over a third (36%) of respondents say that setting **higher food safety standards** should be a top three priority for government when improving the welfare standards of broiler chickens.
 - Adults from the UK, Spain, Poland and Italy are more likely to say this (41%, 40%, 39%, 37%) than the other countries tested (ranging from 30% in Belgium and Germany to 33% in France).

¹⁹ The proportions for Q12 are calculated as follows. If a respondent selects one statement at Q12a, this statement is counted as being ranked #1. If a respondent selects more than one statement at Q12a, they are asked to rank these statements in Q12b, where their ranking choices are counted. The respondent-level data at Q12a and Q12b is then combined to calculate the proportion of respondents who rank each statement as a #1 priority and those who rank a statement as a top three priority for the government to prioritise.

- Nearly one third (32%) of respondents say that **guaranteeing a fair income to farmers** should be a top three priority for government when improving the welfare standards of broiler chickens.
 - Italian (20%) and Spanish (28%) adults are less likely to say this compared to adults from other countries tested (e.g. 37% amongst Belgian, Polish and French adults).
- Those who are educated beyond school level are consistently five percentage points more likely than those who are educated up to school level to say that either setting higher legal welfare standards, higher environmental standards, or higher food safety standards should be a top three priority for government when improving the welfare standards of broiler chickens.

Q13. To what extent do you agree or disagree that chicken sold in the EU should be labelled with information about the welfare standards they were raised under?

	All %
NET: Agree	87%
Strongly agree	55%
Tend to agree	33%
Tend to disagree	5%
Strongly disagree	1%
NET: Disagree	6%
Don't know	7%

Base: All respondents (n=7,090)

- Approaching nine in ten (87%) respondents across the seven European countries agree that chicken sold in the EU should be labelled with information about the welfare standards they were raised under, with over half (55%) strongly agreeing.
- Out of the countries tested, Italian adults are most likely to agree (93%) and Belgian adults are least likely to agree (81%) that chicken sold in the EU should be labelled with information about the welfare standards they were raised under.
- Respondents aged 55+ are more likely those aged 18–34 and 35–54 to agree that chicken sold in the EU should be labelled with information about the welfare standards they were raised under (92%, 81%, 87% respectively).
- Meat eaters/omnivores are equally likely as respondents with a reduced intake of animal products to agree that chicken sold in the EU should be labelled with information about the welfare standards they were raised under (89% and 88% respectively).

Q14. To what extent do you agree or disagree that chicken sold in the EU should be labelled by country of origin?

	All %
NET: Agree	89%
Strongly agree	62%
Tend to agree	27%
Tend to disagree	5%
Strongly disagree	1%
NET: Disagree	6%
Don't know	5%

Base: All respondents (n=7,090)

- Nine in ten (89%) respondents across the seven European countries agree that chicken sold in the EU should be labelled by country of origin, with over six in ten (62%) strongly agreeing.
- Italian (94%) and Polish (93%) adults are more likely than other countries to agree that chicken sold in the EU should be labelled by country of origin, compared to adults from the other countries tested. Belgian adults are less likely than other countries to agree (83%) and are more likely to disagree (8%) or say they don't know (8%).
- Respondents aged 55+ are more likely than those aged 18–34 and 35–54 to say agree that chicken sold in the EU should be labelled by country of origin (95%, 80%, 89% respectively).
- Meat eaters/omnivores are more likely than respondents with a diet involving a reduced intake of animal products to agree that chicken sold in the EU should be labelled by country of origin (91% vs 88%).

FOR MORE INFORMATION:

Kate Hawkins

Consultant

Kate.Hawkins@comresglobal.com

+44 (0)20 7871 8665

Emma McKay

Research Team Leader

Emma.McKay@comresglobal.com

+44 (0)20 7871 8666



WWW.COMRESGLOBAL.COM

LONDON

Four Millbank
London
SW1P 3JA

T: +44 (0)20 7871 8660

F: +44 (0)20 7799 2391

E: info@comresglobal.com

BRUSSELS

Rond Point Schuman 6
Box5, 1040
Bruxelles

T: +32 (0)2 234 63 82

F: +32 (0)2 234 79 11

E: info@comres.eu.com

SHANGHAI

51/F Raffles City
No.268 Xi Zang Middle Rd
HuangPu District Shanghai
200001 China

T: +86 (0)21 2312 7674

E: info@comresglobal.com