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Report concerning consumer perceptions and attitudes towards farm animal welfare

Mara Miele¹

'Expert report related to Task 1.3'

This report presents some key findings on European consumers' knowledge and attitudes to animal welfare based on the Welfare Quality® focus group research and population survey, which were the largest investigations of this type regarding farm animal welfare carried out in Europe to date.

(Evans and Miele, 2007 and 2008, Miele et al., 2010, Kjaernes et al., 2009, Kjaernes and Lavik, 2007).



Focus group discussions: Citizens' animal welfare concerns when they purchase animal products

A series of seven focus group discussions were conducted in 2005 in seven EU countries: Sweden, Norway, Italy, France, the Netherlands, the United Kingdom and Hungary, in order to explore the range of animal welfare concerns, the knowledge about animal farming and the animal food purchasing preferences of diverse groups of ordinary citizens in a sample of European countries that could represent the cultural and geographical differences of Europe. This research was innovative and differed from most of the existing studies because it included Southern European and Scandinavian countries and it focused on 'ordinary' citizens, rather than on people motivated by a specific concern for animal welfare. The majority of existing studies explored the animal welfare concerns of citizens or consumers predominantly in Central or Northern European countries (for a review see Ingenbleek and Immik, forthcoming 2010). The selection criteria used for the focus groups were designed to ensure that people from different socio-demographic and lifestyle backgrounds were included, thus allowing us to explore the full range of discourses associated with animal welfare and with participants' understanding of welfare-friendly food products.

¹ Cardiff University, School of City and Regional Planning, Glamorgan Building, King Edward VII av., CF10 3WA, Cardiff, UK. MieleM@Cardiff.ac.uk



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Each of the focus groups was relatively homogeneous and they consisted of the following categories of participants; urban mothers; rural women; couples without children; seniors; young singles; politically active and vegetarian consumers; and one final 'country specific group'. The themes addressed in the group discussions and the criteria for recruitment of the participants are presented in table 1 and 1.2, the rationale for the themes and the choice of the groups is described in Evans and Miele, 2007.

Focus group discussions produced qualitative information on the *nature* of citizens' (when they act as food shoppers and as consumers) concerns about animal welfare that helped to identify the range of issues to be addressed in the population survey. The latter was carried out by telephone interviews, which were used to verify whether we could generalise the findings of the focus group research (Kjaernes et al. 2009, Kjaernes and Lavik, 2007). Moreover, in the focus group discussions, we explored how people defined what farm animal welfare is and we examined participants' opinions on the list of areas of animal welfare concerns developed by the WQ scientists.

Key findings on European Citizens

General knowledge about farming practices and farm animal welfare:

- *Lack of knowledge of intensive animal farming practices and lack of understanding of specific welfare problems in intensive production*

Despite clear cultural differences, some observations regarding citizens' knowledge about farming practices and farm animal welfare seem to apply across the majority of our study countries. First and foremost, there is a general lack of knowledge of contemporary farming practices: there is a general perception that confined systems of production are inherently detrimental to the welfare of farm animals, but, most remarkably, participants to focus group discussions (in Sweden, Norway, the Netherlands, the UK, Italy, France and Hungary) were not aware of just how widely adopted these systems of production were. Moreover there is a great lack of understanding of the welfare problems of animals living in intensive systems of production (e.g. all indoor systems of production are perceived to be equally detrimental to animal welfare, while all outdoor systems of production are perceived to be inherently animal friendly). In France and especially in the Netherlands, knowledge about farm animal welfare and farming practices was found to be fragmentary, ambivalent and tainted by negative emotions. In Italy, the majority of participants seemed to have little knowledge about practices currently utilized in modern Italian farming systems and they tended to





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assume that a small scale/traditional type of animal farming is still prevalent. In Hungary, consumers' knowledge about farming and farm animal welfare was limited mainly to an understanding of how these activities/issues impact upon public health. In Sweden and Norway there was lack of knowledge about farming practices too, but there was a widely shared perception that animal welfare problems were prevalent in other European countries. In the UK too there was a lack of knowledge, apart from specific issues relating to poultry and calves for veal production. However, we must qualify this general conclusion by adding that both the level and type of knowledge varied depending on the social and cultural background of the participants (and in general the '*politically active*' and '*vegetarian*' participants in all countries possessed a more detailed level of understanding about these issues). Furthermore, whilst the majority of participants seemed to derive their information on these topics from secondary or indirect sources, on the whole, those living in rural areas were more likely to have had more direct experience of farms and farming practices than their urban counterparts, however this did not always shape their perceptions in a positive direction.

- *Information on farming practices and animal welfare issues mostly from the media at the time of food scandals*



Across most of the countries focus group participants seemed to derive their (indirect) knowledge mainly from the mass media, to a large extent fashioned by a scandal-driven media that focused predominantly on negative issues (e.g. BSE, salmonella outbreaks, FMD, dioxin etc.). In France, knowledge seemed to be shaped by striking and highly emotive media images and opinions tended to be linked to topical questions. In Norway and Sweden the media promoted the idea that animal welfare issues, especially in the case of BSE and salmonella, were prevalent in other European countries.

In the UK, people's understandings were shaped by a mass media that seemed to be more concerned with issues of animal transport and slaughter than animal husbandry. The media portrayal of recent food scandals, such as BSE and salmonella, has increased Italian consumer interest in (and knowledge about) farming and certain food products, such as battery produced eggs and foie gras. The mass media seemed to exert a significant influence over consumer knowledge also in Hungary and the Netherlands. However, a significant number of participants in each country simply did not search for information about farming practices and animal welfare. Many clearly stated that they did not want to be reminded about the death or the welfare conditions of the farm animals behind their foods at the time of shopping. These latter citizens,



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especially when they go shopping for food, expected that existing institutions (national and supranational governments, retailers) should take care to ensure that animal farming is thoroughly regulated and controlled (Miele and Evans, 2010).

To summarise, there is a general lack of public knowledge about farming practices and animal welfare problems in particular. The knowledge that people do possess is to a large extent shaped by mass media news at the time of food scandals. Some participants deliberately avoided expanding their knowledge on these subjects in a desire to distance themselves from ethically challenging issues (the death and the welfare of farm animals) and they had an expectation that existing institutions should address these problems. In contrast, the vast majority of participants considered animal welfare to be an issue that mattered to them and a significant number believed that more information would have an impact on their behaviour. However, reaction to more information on this issue would lead to different courses of action: some would protest for more/better regulation on this matter (mostly Scandinavian countries), others would seek to change to more welfare-friendly food retailers (preferred option in Italy and the UK), whereas other consumers would both *boycott* the products perceived as cruel to animals and, possibly, if price, availability and other circumstances would allow them, would choose (or, *to underline the opposite of boycott*) animal friendly products.

- *Consumers' spontaneous concerns about farm animal welfare*

There is clearly a common understanding of animal welfare among the participants in all countries, with only some culturally specific variations. Concerns about animal welfare are clustered into three main sets: *animal-environment*, *animal farming practices*, and *human-animal relations* (table 2). The aspect most often mentioned in all study countries is 'Outdoor access', which seems to suggest a general and widely shared definition of welfare addressing the need for animals not to be confined in closed environments, at least for part of their lives.



Many consider 'outdoor access' for farm animals the best compromise between the ideal life for animals (the wild) and the need to rear animals for human consumption. For Norwegian participants, but also Italian, the best life for animals is in the wild, and only for 'wild animals' can we talk about real animal welfare. Other important environmental aspects in the definition of farm animal welfare are 'Space', 'Fresh air', 'Natural light', 'Cleanliness and hygiene of stables'. Feeding practices (especially feed additives, growth additives, hormones, force feeding, *unnatural* foods and GMOs) were at the forefront of people's minds in every country, with most emphasis in Italy and France.



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For the majority of participants in all countries the quality of life of animals is most important, but the slaughter of animals is problematic as well and, for some, it is a reason for feeling guilty (or uneasy) about eating meat. In most countries a concern for humane slaughtering practices was ranked high in the list of concerns. Human-animal relationships were mostly defined in terms of farmers' duty to care for farm animals and the need to ensure respect for animals. Small-scale production was most often associated with better care, better chances for animals to be considered 'individuals', identified with a name, and not part of an undistinguished 'mass', as in industrial production (factory farming).

- *How to assess and to monitor animal welfare: welfare=positive emotions*



In general the participants reacted favourably to the Welfare Quality[®] experts' list of areas of concerns for a monitoring scheme and they were positive towards the scientific method proposed (i.e. assessing welfare on the basis of the *outcome* for the animals, see Keeling, L., 2009). Most participants identified more commonalities than differences between their understanding and the scientific approach to defining the welfare of animals. However, analysis shows that for the vast majority of consumers the concept of 'animal welfare' implies

ensuring that animals are entitled to experience more positive emotions and positive aspects of life, while the proposed experts' list of concerns focused on checking that negative emotions, e.g. stress and pain, were not occurring or, if inevitable, that they were minimised. In this respect there was a gap between scientists' and consumers' understanding of the level of welfare problems currently existing in the European animal farming population (see table 2.1). For the vast majority of focus group participants issues such as hunger, thirst, and mutilations were considered to be very important for animals but they thought that these problems should not exist anymore in a 'civilised' Europe, and the lack of such problems should not be called 'welfare'. Most participants across the seven countries believed that the term welfare should be used only for describing positive aspects of an animal's life (positive emotions, play etc.) and '*outdoor accesses*', '*natural life cycle*', '*natural feed*' and '*small scale production*' were viewed as particularly relevant conditions for ensuring high levels of welfare for farm animals.



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Population survey: Consideration of animal welfare, trust, and food purchases

The focus group discussions provided rich, in-depth, qualitative insights into the nature of people's concerns for farm animal welfare, and in order to understand the extent of popular engagement on these issues across Europe, representative population surveys were carried out in the same seven countries in September 2005. Data were collected through Computer-Assisted Telephone Interviews (CATI) (Kjærnes and Lavik 2008). The survey was based on probability samples, 1500 interviews in each country, each interview lasted 20 minutes.



The survey confirms generally very positive responses to questions about interest in farm animal welfare. Across the seven countries, a clear majority appeared to be interested or very interested in animal welfare, with some national variation, ranging from 65 to 87%². The French and the Dutch seem to be somewhat less interested, the British are in the middle, while Hungarian, Swedish, Norwegian, and, ranking highest, Italian respondents are very enthusiastic. This interest is expressed even in widespread demands for information (Kjærnes and Lavik 2008, 61). Many are worried about how animals are treated *on the farm*, during *transport* and at the *slaughterhouse* (Kjærnes and Lavik 2008 33). The general association between bad welfare and intensive forms of production is reflected in the high level of concern expressed about poultry farming (except in Hungary, where poultry is often kept in backyards and on small farms) and pig farming in most of the countries. Norwegian and Swedish respondents are consistently less worried about all aspects of farm animal welfare.

- *'Interest' and 'concern' do not translate into buying preferences*

The questionnaire was constructed so as to find out more about links between concern and welfare friendly purchases. Two major points can be made; first, consumer purchase is considerably lower than general interest might indicate and, second, what people say about their shopping for animal friendly products indicates much higher levels of purchase than any market share for welfare friendly labels might indicate. The reasons for this gap are twofold: first of all most people do not think about animal welfare while shopping for food (and the animal origin of food is often hidden in

² These data are consistent with the two Eurobarometer surveys carried out in 2005 and 2006.



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packaging and marketing messages); secondly, most people believe that *quality products* are produced in an animal friendly manner.

- *Animal friendly purchases of meat and eggs*

Figure 1 compares the proportions of respondents generally interested in animal welfare with those thinking about animal welfare while buying meat. Italians rank highest, together with the Swedes, while the Dutch have here been joined by the Norwegians at the lower end. The biggest “discrepancy” between interest and purchases is found in Norway, the least in Sweden and France.



The most developed market for animal friendly options is for eggs, including free-range, barn eggs and organic eggs. Eggs can therefore serve as a better indicator of links between interest and (self-reported) purchases. Table 3 shows the proportions of respondents emphasising organic production and the welfare of hens, respectively, when buying eggs. Together, these give a positive impression; a majority emphasizes animal welfare when buying eggs. Again the most enthusiastic are in Italy, followed by the French, while the Norwegians remain at the bottom of the list. The national response patterns are therefore quite similar for meat and eggs. If the answers are to be believed, three out of four Italians think about welfare and more than half of them buy organic eggs (however the official data of sales of organic eggs do not match these declarations, but if we include eggs bought directly from farms or from small producers, i.e. those who keep few hens in urban gardens (which are very common), the gap might be smaller than the official data indicated). The lower engagement among Norwegians might indicate that they are less concerned with animal welfare in their own shopping.

Another form of consumers’ engagement with animal welfare issues is to become a vegetarian or, going further, a vegan. While the extent of veganism in Europe is very limited, there are quite a few vegetarians. These are not clear-cut categories and the figures from our survey, as well as from other sources, are uncertain. But national differences are quite consistent (Kjørstad 2005). Most vegetarians are found in Great Britain (about 8%), fewest in France (1%), with the other countries in between. There is no clear quantitative support indicating that vegetarianism and veganism have grown in recent years, but symbolically and politically they are important and may serve as a hidden threat in mobilisation against intensive production methods.

- *Why not buying more animal friendly products?*

Roe and Marsden (2007) have indicated that the animal supply chains are a strong limiting factor when it comes to ‘*welfare friendly consumer choice*’ and there are also



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problems with transparency and information to consumers (e.g. limited availability, high prices, scarce and unclear information etc. see also Miele and Evans, 2010). However, another reason for lack of consumers' choice of animal friendly products, in spite of interest in animal welfare, is that many do not see the need for it. A question about whether welfare conditions in their own country have improved or deteriorated showed that, overall, most respondents believe that farm animal welfare has improved over the last ten years in their own country, the only exception being Hungary (figure 2). Only minor proportions think conditions have deteriorated. Many respondents seem to trust supranational institutions (the EU), national governments and the actors involved in the meat supply chains for improving the condition of life of farm animals in Europe. This optimism about trends in farm animal welfare is in accordance with earlier findings on food safety and nutrition, where many Europeans tend to be optimistic about changes in modern food provisioning (Kjærnes, Harvey, and Warde 2007). There are, however, strong and consistent differences in which actors they trust; experts and NGOs are generally highly trusted to tell the truth about a food related problem, followed by the media and public authorities, while much fewer believe in the truth-telling of market actors (Kjærnes and Lavik 2008, 40). When producers and retailers take action, monitoring by civil society groups, independent experts, and public authorities is crucial. In general mistrust in institutional actors constitutes an important cause for people not taking action as consumers, e.g. Italy and most likely in Hungary.

- *Packaging farm animal welfare*

Considering the optimism and the lack of availability, surprisingly many still claim that they make efforts to improve animal welfare through their food purchases. Everywhere, these proportions are much larger than the market shares for labelled welfare friendly products, including organics (Roex and Miele 2005). The gap between the answers to the survey questions and the actual purchases might emerge from a desire to present oneself as morally "better" than one's practices reflect. This is a well-known limit of the 'survey' research method. However, positive responses indicate that a norm has been established about what is the right thing to do (i.e. buying animal friendly products for improving farm animal welfare in the supply chains). This survey, together with those conducted in Eurobarometer, suggests that seeing animal welfare as a consumer responsibility is becoming a widespread norm in Europe, even though with some national variations. The survey analysis as well as the focus group interviews bring several examples of practices which the participants regard as animal friendly, but these are not necessarily consistent with a scientific definition and/or assessment (Evans and Miele 2008, Miele and Evans, 2010, Miele et al., 2010). Some associate good welfare with particular species, like sheep in Norway





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and Mangalica pigs in Hungary, others associate animal welfare to typical production (such as Parmigiano Reggiano, Parma Ham and other PDO/PGI products that are certified according to the European certification of origin of production, Council Regulation (EEC) No 2081/92 of 14 July 1992 and Council Regulation (EC) No 510/2006. More common in most countries is to associate animal welfare with alternative forms of production, often conceptualised as organic, but not necessarily certified as such (products sold in farmers markets or local shops are often perceived as organic, even without certification). Most influential, however, are references to domestic production systems. Meat produced in their own country, within systems and forms of regulation that they know, is by many seen as more animal friendly and as a way to improve animal welfare. To Swedes, buying “Swedish” meat represents a way to show concern for the animals. In a similar way, British respondents seem to trust the quality assurance systems and labelling schemes introduced by the big retailers. Italians, on their part, prefer meat from local vendors in the belief that supporting local (small) producers also brings about better animal welfare. In France many share a broad, inclusive understanding of food quality and high quality food (fresh, authentic and with an exquisite taste) is often regarded as the outcome of production with higher standards of animal welfare (Evans and Miele 2007; Kjørstad 2005). The conception that what is good for the animal is also good for humans is widespread, in particular in France, Italy, and Hungary (Kjærnes and Lavik 2008). In these ways farm animal welfare is mobilized and included in larger stories about nation (like Sweden), place (like Toscana) or brand (like M&S or Waitrose) – imagined communities and identities. Consumer actions are thus linked to cultural identity as well as market power. The ways animal welfare is linked to food consumption are framed by specific local/national food cultures, market structures and public discourses.

Conclusions

Several points can be made on the basis of the focus group discussions and the survey. First, the participants in the seven countries showed high interest in the treatment of farm animals and most of them were under the impression that positive changes have been achieved through recent European and national legislation as well as positive initiatives by retailers and other meat supply actors. Second, in most countries the majority of participants had limited knowledge of animal farming practices, but they tended to associate negative welfare with industrial-intensive methods of production (factory farming) and large-scale production (mass production), whereas they tended to associate positive welfare with organic, free range and extensive/ outdoor systems of production, as well as small-scale farming. ‘Organic’ was unanimously perceived as the most welfare friendly system of production across the seven study countries. Third, the vast majority did not prioritise animal welfare considerations while shopping for food, and many thought that they were choosing welfare friendly products while buying ‘*quality assured products*,’ i.e. they would expect all quality products to be produced in an animal friendly manner. Product labels and brands are considered useful sources of information for assessing the animal



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friendliness of products even when they do not carry any specific welfare claim. Their importance varies across countries, consistent with availability: most important in the UK, Sweden and the Netherlands, least important in Norway and Hungary. In Italy and France brands are considered important for assessing welfare friendliness, even though most brands make little or no explicit reference to animal welfare. Fourth, while the consistently positive answers lend support to the view that a norm has been developed in Europe about consumer responsibility for animal welfare, consumer action (i.e. what people actually do in order to enact this norm) is strongly dependent on trust in experts, food suppliers and regulatory institutions.

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Table 1: Themes addressed in the focus group interviews

THEMES ADDRESSED	TOPICS WITHIN EACH THEME
1. Culinary practices	<ul style="list-style-type: none"> • Food consumption cultures and habits in different countries • The consumption, preparation and purchase of meat, dairy and egg products
2. Consumers' general knowledge about farming practices and animal welfare	<ul style="list-style-type: none"> • Sources of information • Evaluation of available information • Gaps in the provision of information
3. Consumers' knowledge of welfare-friendly food products	<ul style="list-style-type: none"> • Consumers' familiarity with welfare-friendly products • Consumers' familiarity with welfare-friendly certification/assurance schemes (and the criteria behind them) • Perceived pros and cons of different products and schemes
4. Consumers' evaluation of the provision of information about welfare-friendly products	<ul style="list-style-type: none"> • The level of consumer demand for information about animal welfare • Consumer preferences regarding product labelling
5. Consumers' interactions with and perceptions of welfare-friendly products	<ul style="list-style-type: none"> • Perceived positive and negative attributes of welfare-friendly foodstuffs • Barriers to purchasing welfare-friendly foodstuffs • Ethical dilemmas related to the purchase of welfare-friendly foodstuffs
6. Responsibility	<ul style="list-style-type: none"> • Consumer perception of who <i>should be</i> taking responsibility for animal welfare • The perceived roles of consumers in relation to the state with regard to animal welfare • Consumer perception of who is actually taking responsibility for animal welfare • The interconnections between consumer practices, consumer knowledge and notions of responsibility
7. Agency	<ul style="list-style-type: none"> • Strategies of political mobilisation adopted by consumers in relation to animal welfare • Consumers' perception of their ability to influence animal welfare • Consumer boycotts and 'buycotts' of specific meat or animal products • Reflexive and non-reflexive consumption practices
8. Trust	<ul style="list-style-type: none"> • Who consumers trust/distrust to provide reliable information about animal welfare • Why consumers trust some organisations but distrust others • Do levels of trust vary in relation to the specific issue under consideration (e.g. labelling, monitoring)?
9. Consumers' evaluations of a proposed scientifically based standard for farm animal welfare	<ul style="list-style-type: none"> • Participants' spontaneous animal welfare concerns and priorities • Participants' reactions to the list of ten welfare concerns developed by Welfare Quality scientists



Table 1.2 : Summary of selection criteria for the consumer focus groups

GROUP	SELECTION CRITERIA
All participants	Aged 18-70, meat-eaters who eat meat at least once a week (except for group 6), must have a <i>bare minimum</i> level of interest in either animal welfare issues or farming
Group 1: Urban mothers	Female, aged under 50, with children (50% with at least one child under 5, 50% with at least one teenage child), urban dwellers
Group 2: Rural women	Female, aged under 50, must live in or have grown up in a 'rural' area, must not be farmers or farmers' partners
Group 3: Married or living with partner but without children	Mixed gender, 50% aged over 40, childless, or no children living at home at present, married or living with a partner, urban dwellers, must do at least 50% of food shopping
Group 4: Seniors	Mixed gender, aged 55-70, must do at least 50% of food shopping
Group 5: Young singles	Mixed gender, aged under 35, single, urban dwellers
Group 6: Politically active and vegetarian consumers	Mixed gender, 50% of the participants should classify themselves as vegetarians (vegans should not be included), 50% of the participants should be 'politically active' consumers (as defined in the recruitment questionnaire)
Group 7: Country specific group	Groups that are of particular interest within specific study countries (e.g. hunters in Norway, gourmets in Italy, ethnic minorities in France)

Table 3: The importance of 'organic' and the treatment of hens when buying eggs³

Figures show the percentage of those respondents who bought eggs who replied 'very important' in relation to the two categories.

<i>Organic</i>	39	45	40	23	35	12	25
<i>Treatment of the hens</i>	58	77	73	64	62	41	59

³ Continuing with eggs, are the following factors very important, fairly important or not important at all? A. Organic. B. Treatment of the hens. Weighted. N=1500 in each country, Don't know excluded



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Table 2: Spontaneous concerns regarding farm animal welfare among focus group participants

Spontaneous Concerns	France	Italy	The Netherlands	United Kingdom	Sweden	Norway	Hungary
Environment							
Outdoor access, free range, extensive production, Possibility to choose between indoors and outdoors, Space, natural space.	X	X	X	X	X	X	X
Natural light, fresh air		X	X				
Distractions (playing)			X				
Wild animals						X	
Farming practices							
Natural type of feed, No artificial growth stimulants, Lifespan, Time for normal growth	X	X	X	X	X	X	X
Humane slaughter	X	X	X	X	X		
Breeding, genetic modification				X			
Natural reproduction		X					
No mutilations, no pains			X		X		
No use of routine medicines				X			
Transport (limited or avoided)	X	X	X	X	X	X	
Human Nonhuman animals relationships							
Respect, Care, Physical comfort and security	X	X		X	X	X	
Good quality of life	X	X		X		X	
Products with someone 'accountable for' (farmer, vet.)		X				X	
Animals as individuals (name)						X	
Company, love, happiness					X		



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Tab. 2.1 Commonalities and Gaps between ordinary citizens' and scientists' lists of welfare concerns

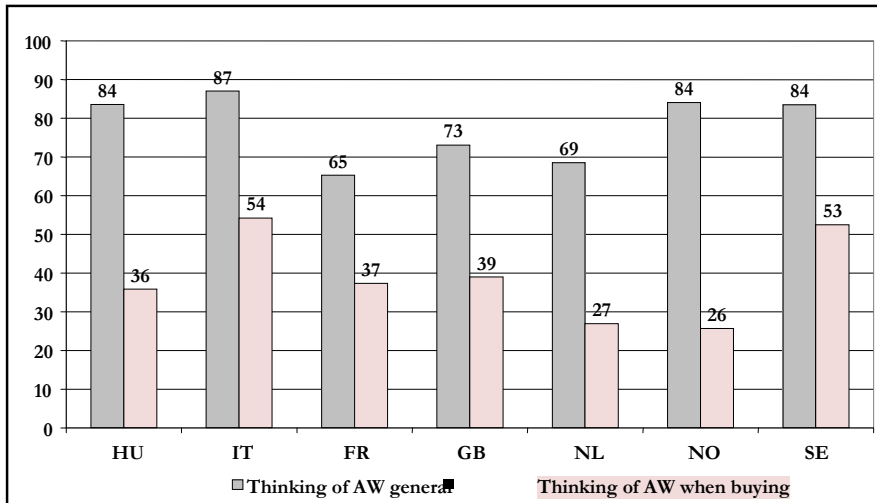
	Areas of Concerns	National variation
Commonalities	All areas of concerns indicated by the scientists were considered to be important and largely matched the focus group participants' concerns.	Italy: most enthusiastic; France: positive emotions considered not appropriate for animals (too human).
Gaps identified by the focus group participants	Lack of specification about the quality of feed, access to natural pasture, the use of growth promoters, GMO, antibiotics, routine medical treatments.	
Possible gaps not clearly identified by the focus group participants	Prescriptions about outdoor access, minimum space requirements, natural life cycle (breed selection, genetically modified animals) animals' lifespans, natural life cycle, scale of production, traditional farming.	



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Figure 1: General interest in animal welfare⁴ (among all) and thinking of animal welfare when buying meat (among those who have bought meat)⁵.

Per cent proportion 4+5 on a scale 1-5



⁴ Thinking of farm animal welfare *in general*, how important is this issue for you on a scale of 1-5, where 1 is not at all important and 5 is very important? Weighted. Don't know excluded (N = HU: 1462, IT: 1478, FR: 1497, GB: 1490, NL: 1489, NO: 1493, SE: 1496)

⁵ When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1-5 where 1 is never and 5 is always? (Among those who have bought meat). Weighted. Don't know excluded (N = HU: 1249, IT: 1173, FR: 1337, GB: 1330, NL: 1248, NO: 1364, SE: 1334)



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Figure 2: In general, over the past 10 years, do you think that farm animal welfare in [OWN COUNTRY] has improved, is about the same or has got worse?⁶



⁶ Weighted. Don't know excluded (N = HU: 1310, IT: 1365, FR: 1483, GB: 1384, NL: 1434, NO: 1463, SE: 1393)