

# Attitudes of consumers towards the welfare of farmed animals

## Wave 2

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This document does not represent the point of view of the European Commission.  
The interpretations and opinions contained in it are solely those of the authors.

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## INTRODUCTION

European Union policy for food safety aims, among other things, at ensuring a high level of food quality, animal health as well as animal welfare and protection.

The Amsterdam Treaty, which came into force in May 1999, establishes new fundamental rules for the European Union's animal protection measures in the "Protocol on protection and welfare of animals". It officially recognises that animals are sentient beings and requires the European Institutions and Member States to give full regard to the welfare requirements of animals in formulating and implementing Community legislation.

The new draft Treaty establishing a Constitution for the European Union, signed on 29 October 2004 by the heads of States and Governments of the 25 Member States as well as by Romania, Bulgaria and Turkey, also undertakes to ensure the protection of animals.

This second survey focusing on the attitude of consumers to the welfare and protection of farmed animals was commissioned by the European Commission's Health and Consumer Protection Directorate General. The survey has been carried out by TNS Opinion & Social, interviewing 4 010 citizens in the two acceding countries (Bulgaria and Romania) and in the two candidate countries (Croatia and Turkey) between December 7<sup>th</sup> 2005 and January 11<sup>th</sup> 2006. The first wave of this survey had been carried out in February and March 2005 in the 25 Member States of the European Union.

It should be noted that since the previous wave of the survey, **avian influenza** hit the headlines at the end of 2005 and reached Romania and Turkey in December 2005 and January 2006.

The methodology used is that of Eurobarometer surveys as carried out by the Directorate General Communication ("Public Opinion and Media Monitoring" Unit). A technical note on the manner in which interviews were conducted by the Institutes within the TNS Opinion & Social network is in the annex of this report. This note indicates the interview methods and the confidence intervals.

This report tackles the following themes in turn:

- ◆ the welfare of farmed animals,
- ◆ purchasing behaviour and the welfare of farmed animals,
- ◆ and animal welfare at the European level.

For each of these points, we consider the breakdown of results by country and we compare these results with the European average rates observed in the first wave of this survey.

## 1. The welfare of farmed animals

Source: questions 4, 5, and 6

This first section aims to determine the level of consumer knowledge about farms where animals are reared as well as the welfare and protection of several of the species raised on them.

### 1.1. Knowledge of farms where animals are reared

Source: question 4

Have citizens of candidate and acceding countries already visited farms where animals are reared? And if so, how often have they done so?

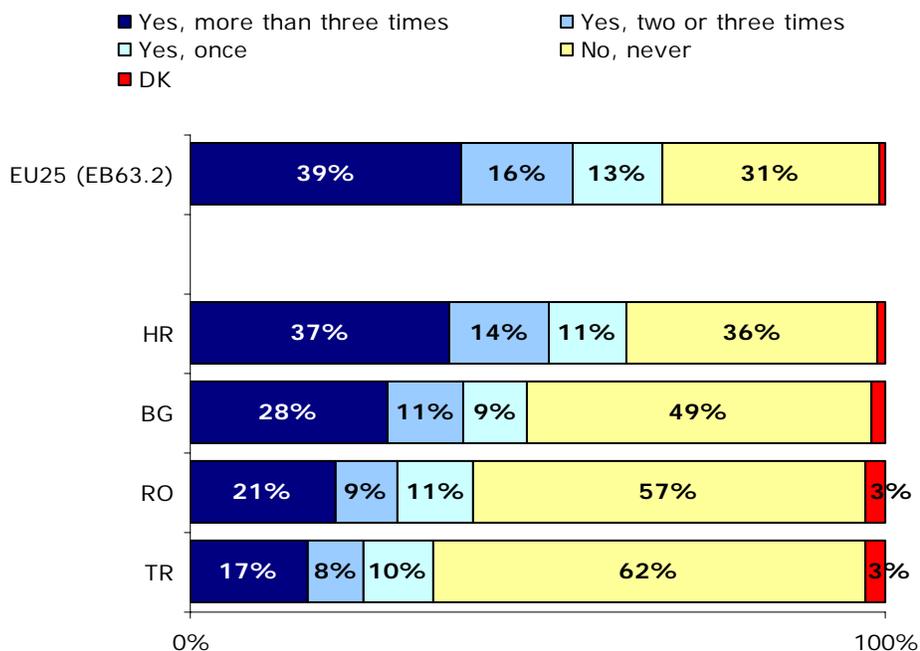
***-The frequency of such visits varies considerably from one country to another-***

While around two in three Croatians state that they have already visited a farm which rears animals, a significant proportion of respondents of the three other surveyed countries state that they have never visited a farm where animals are reared. Indeed, around two in three respondents in Turkey (62%) and in Romania (57%) affirm that they never did..

***-Frequency of visits much lower than in the EU25-***

Except in Croatia, we can note that the percentage of respondents who have already visited this kind of farm is much lower than in the EU25 (first wave of this survey). Only 35% of Turks, 41% of Romanians and 48% of Bulgarians say that they have visited a farm of this type at least once, compared to 62% of Croatians.

#### Q4 Have you ever visited a farm which rears animals?



## 1.2. Opinion on the protection of farmed animals

Source: questions 6 and 8

After having assessed the level of experience of having visited farms where animals are reared, we measure the perceptions that citizens of the four surveyed countries have regarding the welfare and protection of some of the main farmed animals, i.e. laying hens, dairy cows, pigs and also fur animals.

### *-Welfare and protection specific to each species-*

As was already observed in EB63.2 (February/March 2005) at the level of the European Union, we observe a distinct perception of welfare and protection for each species of farmed animal.

In contrast with the EU25 results, we can note that the respondents in the candidate and acceding countries have a more positive opinion of the welfare of laying hens and a more negative opinion of the welfare of dairy cows and pigs.

#### 1.2.1. Laying hens

##### *-Hesitant point of view on the welfare of laying hens in the candidate and acceding countries-*

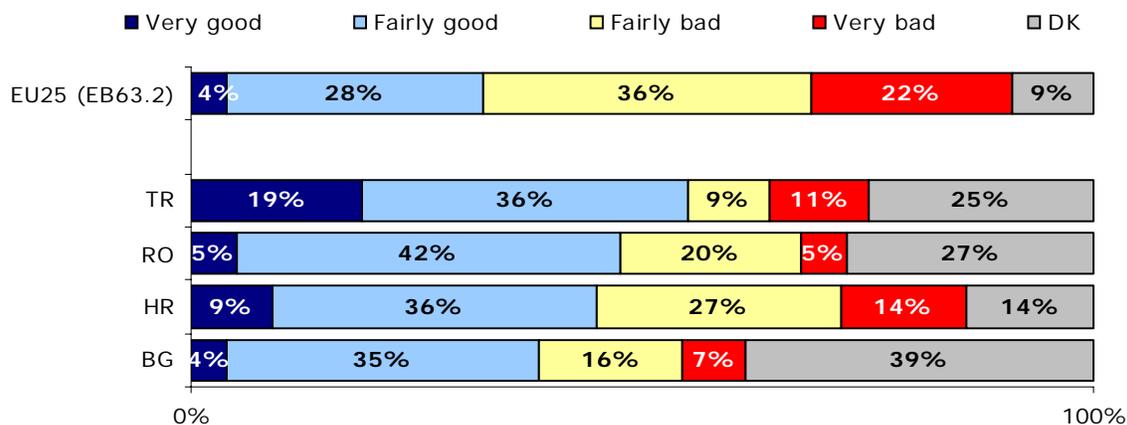
The analysis of results by country highlights the differences in opinion between the 4 surveyed countries. Except in Turkey (55%), we can observe that a minority of the respondents gave a positive opinion about the welfare of laying hens.

Despite this, in comparison with the results observed in the European Union, we can note that the inhabitants of the candidate and acceding countries have a better opinion of the welfare/ protection of laying hens. This may be linked to the types of rearing systems used (e.g. backyard flocks, free-range systems or more intensive barn or cage housing systems).

Finally, the non-response rate (people who answered "don't know" or who did not answer the question) seems very high in the four countries surveyed. This rate varied considerably and is especially high in Bulgaria (39%). In the first wave of this survey, this rate was already high in some new Member States and even exceeded 20% in the Baltic States.

#### Q8.1 In general, how would you rate the welfare\protection of the following farmed animals?

Answer: Laying hens (producing eggs)



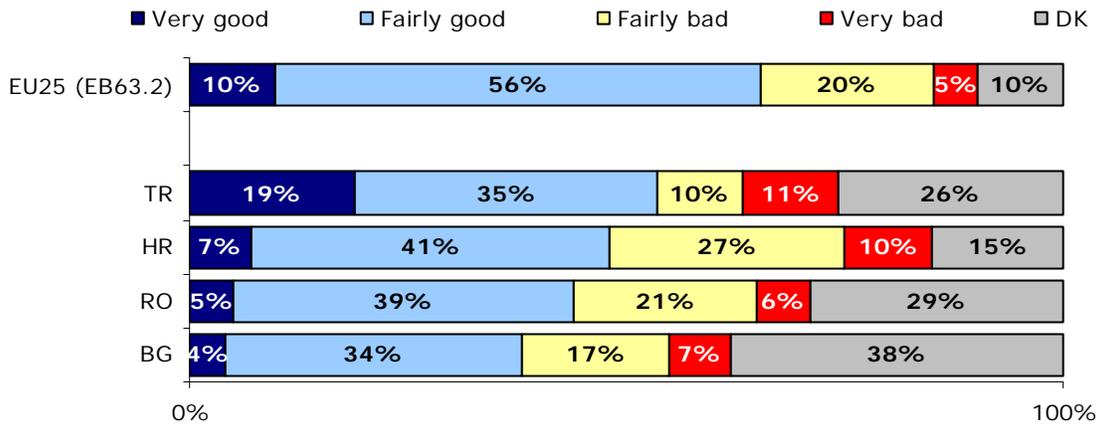
1.2.2. Dairy cows

**-Welfare of dairy cows perceived positively only in Turkey-**

A majority of the respondents in Turkey (54%) have a positive perception of the welfare and protection of dairy cows. On the contrary, this proportion is lower than 50% in Croatia (48%), Romania (44%) and Bulgaria (38%).

Once more, there is a non-response rate<sup>1</sup> of above 25% in Bulgaria (38%), Romania (29%) and Turkey (26%). These non-response rates were also higher than 20% in some new Member States in the previous wave.

**Q8.2 In general, how would you rate the welfare\protection of the following farmed animals?  
Dairy cows (producing milk)**



<sup>1</sup> Those who answered don't know or did not answer

### 1.2.3. Pigs

#### -A mixed opinion on the welfare of pigs-

As already observed in the European Union in the first wave of this survey, the analysis by country also reveals contrasting opinions about the welfare of pigs<sup>2</sup>, although these are less clear-cut than in the case of the other two animal species.

This time, the positive rates are much closer to the European Union average. While 42% of Croatians believe that the welfare of pigs is good, 43% of them have a negative opinion on this matter. In Romania and Bulgaria, the positive answer rate is higher than those of a negative perception. Nevertheless, the high non-response rates, especially in Bulgaria (40%) and Romania (30%) suggest a lack of awareness about the actual conditions in which pigs are reared.

**Q8.3 In general, how would you rate the welfare\protection of the following farmed animals?  
Pigs (producing meat)**

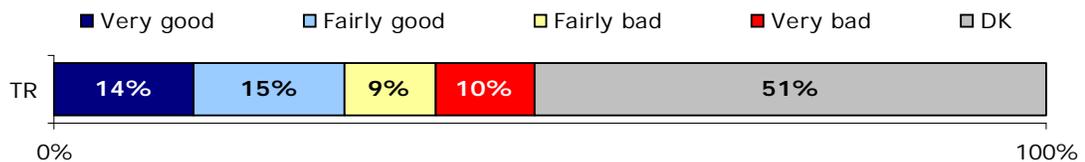


### 1.2.4. Fur animals

In Turkey, we have also measured the opinion of respondents concerning the welfare of fur animals, instead of asking about the welfare of pigs.

The graph below highlights the very high non-response rate concerning this particular point. Those who expressed their opinion also more often positively evaluate the welfare of fur animals.

**Q8.3 In general, how would you rate the welfare\protection of the following farmed animals?  
Fur animals**



<sup>2</sup> This sub-question has not been asked in Turkey as most of the population is Muslim.

### 1.3. Priorities for protection of species

Source: question 5

After measuring respondent’s perceptions regarding the welfare of certain species, in this third section we aim to identify the farmed animals for which respondents thought that welfare and protection should be most improved.

***-The level of welfare of laying hens, broiler chickens and pigs to be improved as a priority-***

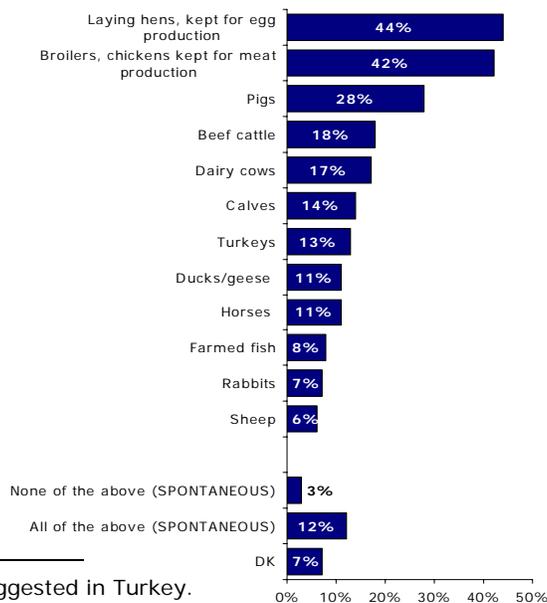
More than five in ten citizens of the four countries mention laying hens kept for egg production as one of the two species whose welfare is most in need of improvement in terms of welfare and protection. As in the European Union, this result is a logical consequence of the very critical perception that Europeans have of the welfare of this animal.

Pigs are also classified among the two species whose welfare is most in need of improvement by more than four of ten in the three countries where pigs are usually consumed<sup>3</sup>.

Laying hens, broiler chickens and dairy cows rank among the top three or four species whose welfare and protection is most in need of improvement in the four countries concerned.

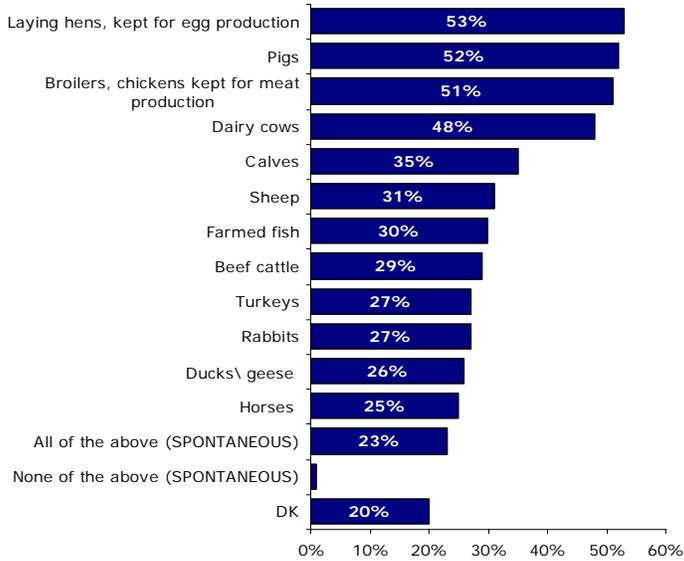
In comparison with the rates observed in the EU25 in the first wave of this survey, we can note that the percentage of citation for each species is higher in the four countries. We can also note that if other species seem to be of very little concern to respondents in the EU25, it is not always the case in the four surveyed countries. We could once more imagine that these results are linked to country-specific factors, the consumption rates of meat from these animals or their products, to their corresponding type of rearing systems or to a lesser knowledge of these rearing systems.

**Q5 In your opinion, from the following list, for which three farm animals should the current level of welfare\ protection be improved the most?  
(EU25 - EB63.2)**

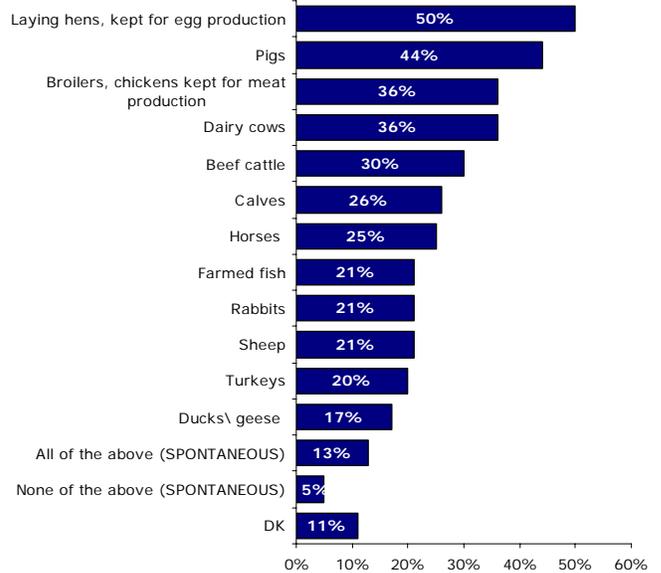


<sup>3</sup> This item has not been suggested in Turkey.

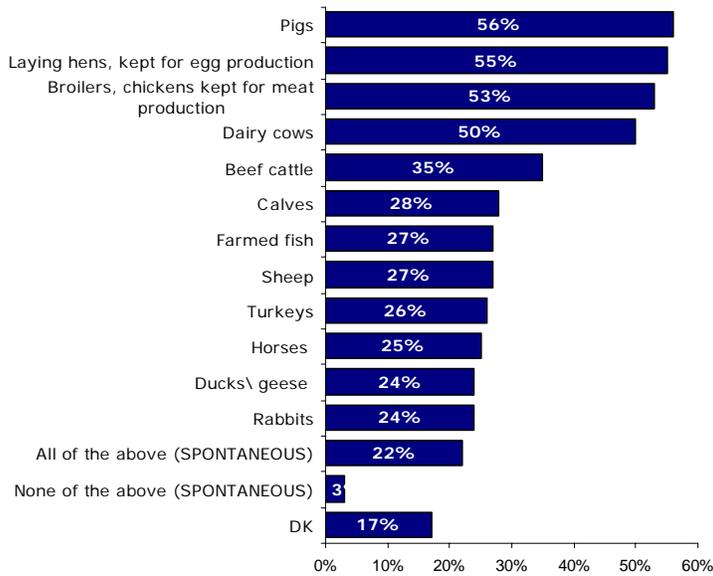
**Q5 In your opinion, from the following list, for which three farm animals should the current level of welfare\ protection be improved the most?**  
**BULGARIA**



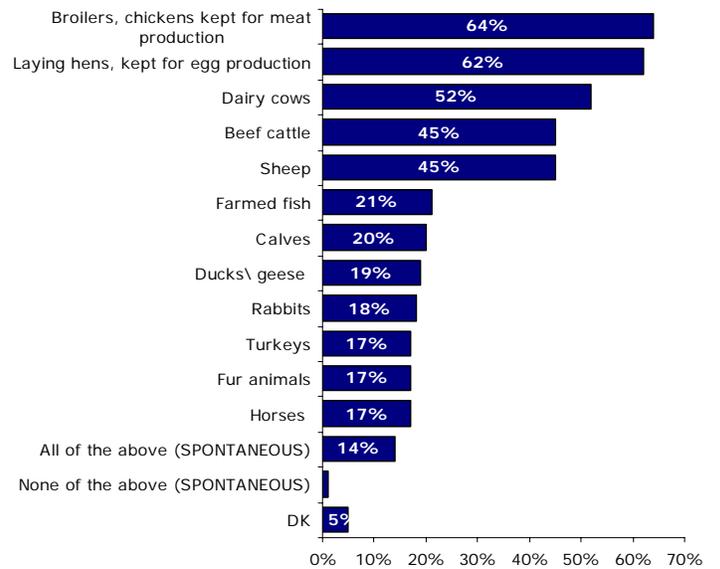
**Q5 In your opinion, from the following list, for which three farm animals should the current level of welfare\ protection be improved the most?**  
**CROATIA**



**Q5 In your opinion, from the following list, for which three farm animals should the current level of welfare\ protection be improved the most?**  
**ROMANIA**



**Q5 In your opinion, from the following list, for which three farm animals should the current level of welfare\ protection be improved the most?**  
**TURKEY**



**The analysis by country** for the five species whose welfare and protection respondents consider should be improved as a priority reveals some differences. Indeed, the rates at which this prioritisation was perceived in the four countries varied.

#### **a. Laying hens kept for egg production**

More than six of ten respondents in Turkey (62%) are calling for improvements in the rearing conditions of laying hens kept for egg production. In the three other countries, at least 50% of the interviewees have cited this species. The results in Turkey may be influenced by the fact that for cultural reasons respondents in Turkey were not asked about the welfare/ protection of pigs.

In Bulgaria and in Croatia these animals are cited as those for which respondents most wanted welfare improvements.

#### **b. Pigs**

Pigs are mentioned in first position in Romania (56%) and in second position in Bulgaria (52%) and in Croatia (44%). In the European Union (EB63.2), pigs were cited by only 28% of the respondents, nevertheless they were already mentioned by a majority of Danish, Dutch and Greek respondents.

#### **c. Chickens kept for meat production**

Nearly two thirds of the citizens in Turkey (64%) mention chickens raised for meat production as the animals for which the current level of welfare and protection must be improved the most.

These animals are cited in third position in the other countries. They are mentioned by a majority of respondents in Bulgaria (51%) and Romania (53%), but only by 36% of Croatians.

#### **d. Dairy cows**

Dairy cows were only mentioned by 17% of the EU25 citizens, this species is cited in third position in Turkey by 52% of the interviewees and in fourth position in the three other countries with 50% of citations in Romania, 48% in Bulgaria and 36% in Croatia.

#### **e. Other**

Beef cattle and sheep are also mentioned by a significant proportion of the respondents in Turkey (45%).

## 2. Purchasing behaviour and farmed animal welfare

Source: questions 3, 6, 7, 9 and 10

This second section exposes various issues linked to purchasing behaviour for food sourced from farmed animals.

Do purchasers take account of the welfare and protection of farmed animals? Can they identify rearing systems when they buy eggs, milk or meat? Do they believe that they can influence animal welfare by their purchasing behaviour? And finally, are they ready to pay more for products sourced from rearing systems that better respect animal welfare?

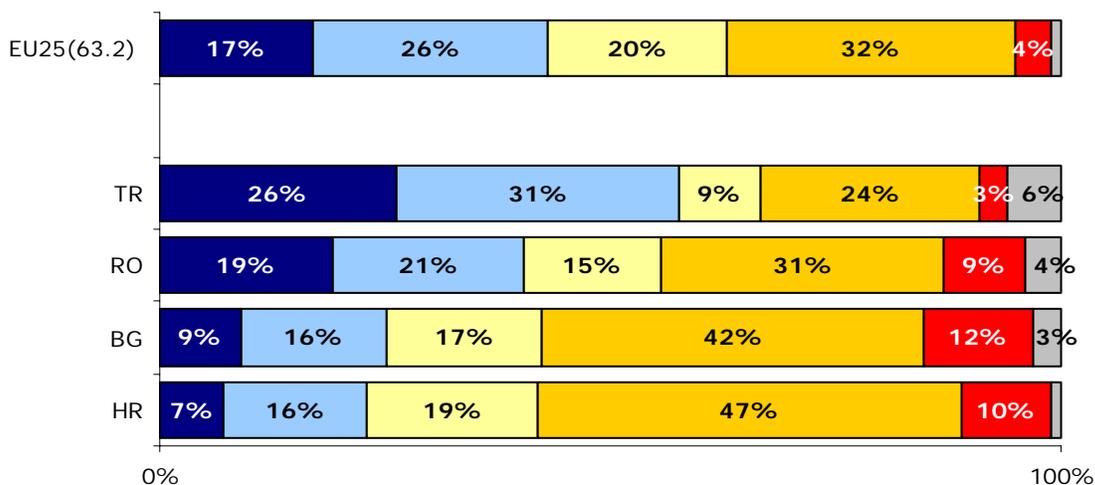
### 2.1. Thinking of animal welfare when purchasing meat

Source: question 3

Do purchasers think about the welfare of animals when they buy meat, and how often do they think about it?<sup>4</sup>

**Q3 When you purchase meat (poultry, beef, pork, fish, etc.) do you think about the welfare\ protection of the animals from which these meat products have been sourced?**

- Yes, most of the time
- Yes, some of the time
- No, very rarely
- No, I never consider it
- I never purchase meat (SPONTANEOUS)
- DK



***-Contrasting opinions between the four countries, Turks are those who most think about animal welfare when they buy meat products-***

A slight majority of the Turks state that most of the time (26%) or some of the time (31%), they think about the welfare and protection of animals when they buy meat while around one in four inhabitants in Bulgaria (25%) and Croatia (23%) think the

<sup>4</sup> Pork was not mentioned to respondents in Turkey.

same. In the latter two countries, a majority of respondents very rarely or never consider the welfare of the animals from which these meat products have been sourced.

We can note that at the European Union level, a slight majority of the citizens (52%) affirm that they never or very rarely think about the welfare and protection of animals when they buy meat. It is worth recalling that results in the previous wave had highlighted very contrasting opinions between the Member States and a lower attention to the welfare of farmed animals in the new Member States.

As in the previous wave, it may be presumed that factors such as living standards, the level of information about rearing conditions, identification systems, ecological sensitivity or even a 'cultural' sensitivity of food quality all influence respondents' opinions.

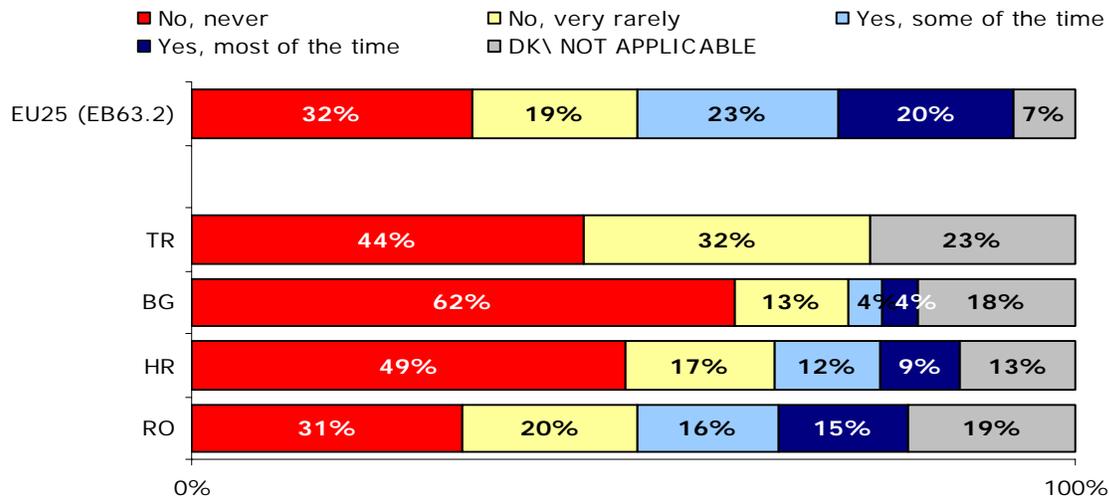
## 2.2. Identification of rearing systems

Source: question 6

While the previous section highlighted consumers' sensitivity to animal welfare issues when purchasing meat, this second section aims at pointing out whether the respondents can easily identify from the label those products sourced from animal welfare friendly production systems.

### ***-Significant difficulties in identifying animal welfare friendly production systems-***

**Q6 When purchasing eggs, meat or milk can you easily identify from the label those products sourced from animal welfare friendly production systems?**



In the previous wave, a slight majority of citizens of the European Union (51%) stated that they had difficulties in identifying from the label whether the production system is animal welfare friendly when they buy eggs, milk or meat.

Compared to the EU results, the rate of those for which this identification appears to be never possible seems particularly high in Bulgaria (62%), Croatia (49%) and Turkey (44%). This will of course influence their ability to consider animal welfare when making their food purchasing decisions.

In the four surveyed countries, a majority of respondents never or very rarely recognise this information from the label. In Turkey, we can note the absence of "yes" answers. It seems that this is a new topic in Turkey and consequently awareness levels are very low and animal products with such labels are not widespread in supermarkets or stores. If these products are on sale in Turkey it is most probably in small health stores selling niche products.

Awareness here is also particularly low in Bulgaria, where only 8% of respondents stated that they are able to identify this information some of the time (4%) or most of the time (4%).

We had observed in the previous wave that results vary greatly across the European Union. In all the new Member States, a majority of respondents admitted that they could never identify, or could only very rarely identify, products sourced from animal welfare friendly production systems. Results in Bulgaria and Croatia are quite close to those observed in the new Member States while the Romanian results approach the EU25 rates.

### 2.3. Buying eggs

Source: question 9

#### ***-A low level of attention to the source of eggs-***

The results vary greatly between each country but also between these four countries and the European Union average.

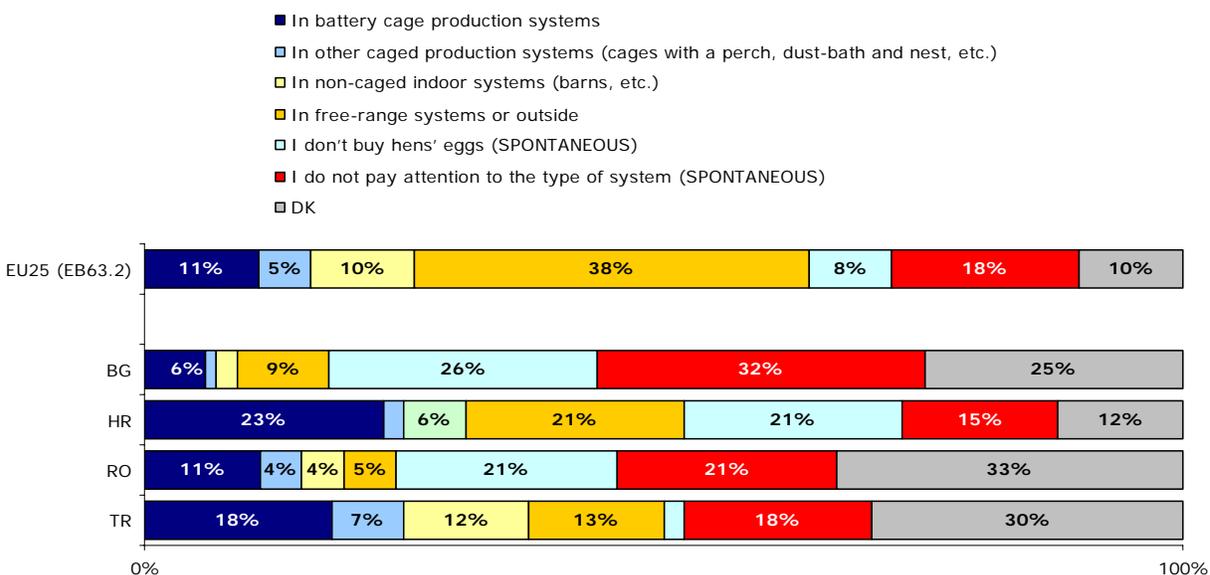
Comparing with the EU average, it should be noted that except in Croatia, the attention given to the egg sources seems quite poor. Indeed, the sum of the percentages of those who don't pay attention to the source of eggs and those who could not answer the question (DK answers) reaches 57% of interviewees in Bulgaria, 54% in Romania and 48% in Turkey. In comparison with the previous wave, it should be noted that this proportion was already high in some of the European Union Member States. Nevertheless, we can also imagine that the arrival of avian influenza in Europe could have impacted these results. The significant non-response rate also shows a certain lack of knowledge among respondents concerning the source of the eggs that they buy.

While at the European Union level almost four citizens in ten (38%) surveyed state that they buy eggs from hens raised in free range or outdoor production systems, this proportion is much lower in the candidate and acceding countries, especially in Romania (5%) and Bulgaria (9%).

It should also be noted that the Croatians (23%) and the Turks (18%) are more inclined to buy eggs sourced from battery cage production systems.

The specific responses in different countries are also probably linked to the different production systems and egg sources specific to each country.

**Q9 When you buy eggs do they mostly come from hens kept...?**



As in the first wave of this survey in the European Union, the stated source of eggs varies very considerably from one country to another. Recalling that a majority of respondents in countries situated in the North of the European Union seemed distinctly more likely to buy eggs produced in free-range or outdoor systems, the results in the the candidate and acceding countries seem similar to those observed in several new Member States and in several southern countries of the European Union (First wave of this survey).

## 2.4. Impact of purchasing behaviour on animal welfare

Source: question 7

Do buyers think that they can positively influence the welfare and protection of animals by their purchasing behaviour?

### ***-Contrasting opinions between the countries regarding their possible influence on the welfare of farmed animals through their purchasing behaviour-***

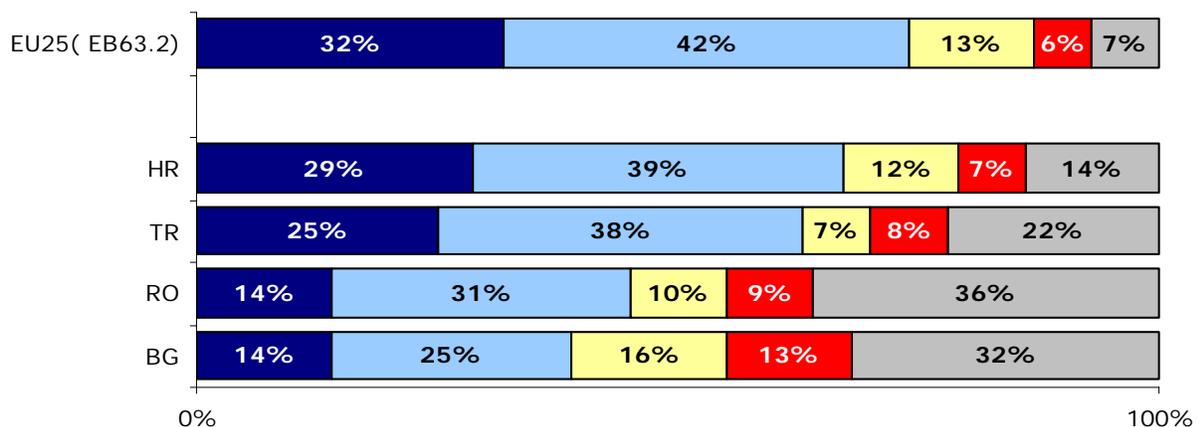
While a majority of Turks (63%) and Croatians (68%) state that they can influence the welfare and protection of farmed animals for the better through their purchasing behaviour, only 39% of Bulgarians and 45% of Romanians share the same opinion. Nevertheless this low proportion in the acceding countries is mostly due to a high non-response rate ('don't know') which reaches more than 30% in both countries.

It should be noted that in comparison with the results of the first wave in the EU25, the percentage of those feeling that they are able to make a difference through purchasing behaviour is lower in the four countries, especially in Romania and Bulgaria.

In the European Union (wave1), a majority of respondents stated that they can influence animal welfare by their purchasing behaviour. Nevertheless, this proportion was lower than the EU average in several of the new Member States,

### **Q7 Do you believe that buying animal welfare friendly products could have a positive impact on the welfare\ protection of farm animals?**

■ Yes, certainly    ■ Yes, probably    ■ No, probably not    ■ No, certainly not    ■ DK



## 2.5. Are consumers prepared to pay more for a better welfare for laying hens?

Source: question 10

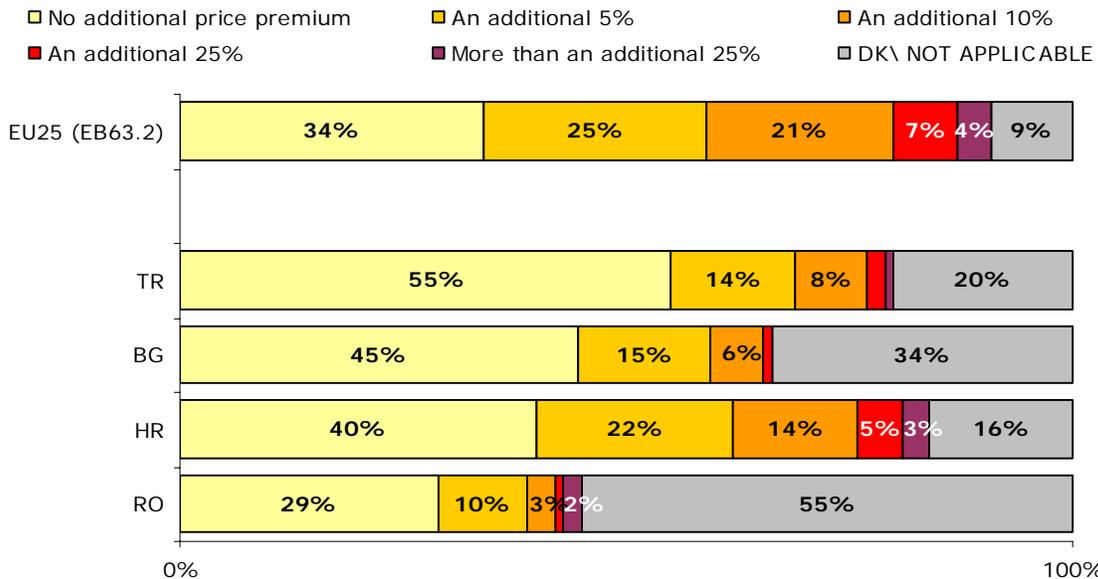
Are consumers willing to pay more for hens' eggs sourced from an animal welfare friendly production system? And, in particular, what price premium are they willing to accept?

**-Contrary to the European Union citizens, a greater number of people in the candidate and acceding countries are not willing to accept an additional price premium-**

Except in Romania where the non-response rate is particularly high, the percentage of respondents against any additional premium is significantly higher in the surveyed countries than in the European Union.

The percentage of respondents who would be willing to accept any price premium is particularly small in Romania (less than 20%), Bulgaria and Turkey. Croatian rates are closest to that of the European Union average.

**Q10 What additional price premium would you be willing to pay for hen's eggs sourced from an animal welfare friendly production system?**



While a quarter of the respondents stated that they could accept a 5% price increase in the European Union, this proportion is much smaller in Romania (10%), Turkey (14%) and Bulgaria (15%).

This is also the case if we consider those who are willing to accept an additional 10% increase. While at the level of the European Union, one of five citizens is willing to accept such a price premium, only 3% of Romanians, 6% of Bulgarians and 8% of the Turks could accept the same.

The Croatians are the most likely to assert that they are willing to accept a price increase. In the other countries, we can note that the proportion of persons willing to accept an increase in the price of 25% or more is negligible.

There was also a significant contrast between response rates in different Member States (Wave 1). Nevertheless, except in Croatia, far fewer respondents in the acceding and candidate countries would be willing to accept an increase compared to the other European Union Member States. However the very high non-response rate should also be highlighted: 55% in Romania and 34% in Bulgaria.

### 3. Animal welfare at the European level

Source: questions 11, 12 and 13

#### 3.1. Perceptions of existing legislation

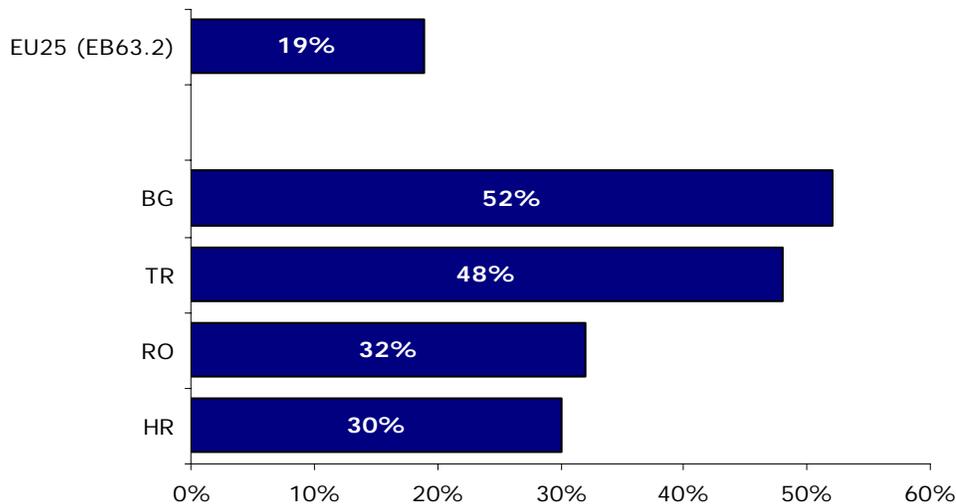
***-Citizens of the candidate and acceding countries are in general poorly informed on European legislation on animal welfare-***

When asked about the existence of European legislation to promote the welfare and protection of farmed animals, it should be noted that the inhabitants of the candidate and acceding countries have a poor knowledge of this legislation, especially with regard to transport and animal slaughter. For both domains, the level of information is, in general, lower than the rates observed at the European Union level. By contrast they seem "relatively" more aware of the existence of legislation regarding the conditions under which animals are reared on farms.

The very high non-response rate (cfr: graph below) in the four countries confirms the lack of knowledge of such legislation, particularly in Bulgaria and Turkey.

**Q11 From the following subjects related to the welfare\ protection of animals, please indicate the ones for which you believe European Union legislation exists.**

**Answer: don't know**



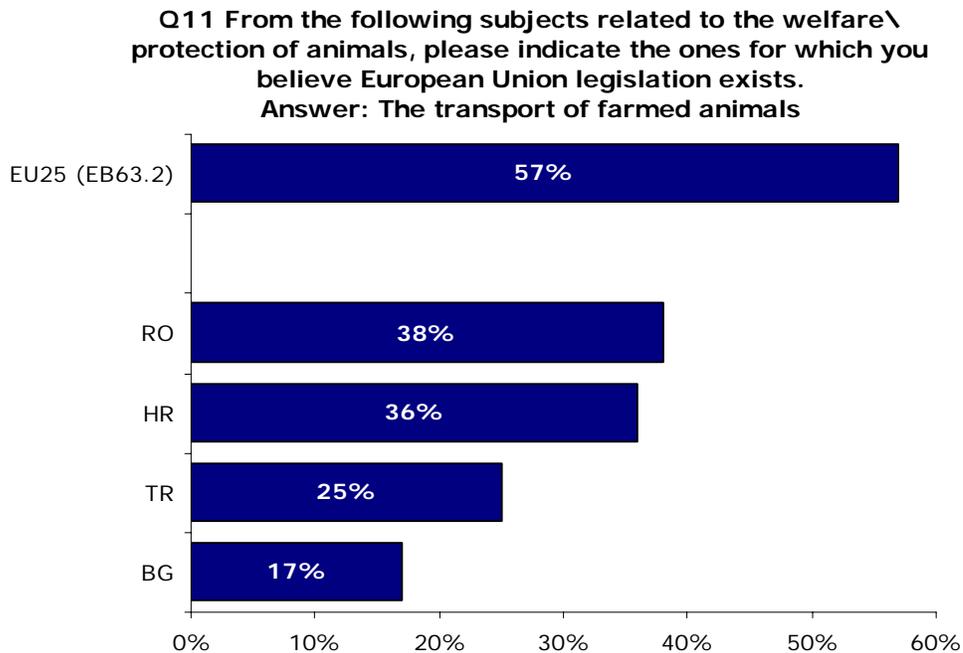
### 3.1.1. The transport of farmed animals

#### **-A low level of information in the candidate and acceding countries-**

When asked about the existence of European legislation to promote the welfare and protection of farmed animals in the field of transport, a minority of citizens believe that such legislation exists in the European Union.

This proportion is much lower than the European Union average and is particularly low in Bulgaria (17%) and Turkey (25%).

Country results are quite similar to those observed in several new Member States as well as the countries in the south of the European Union.



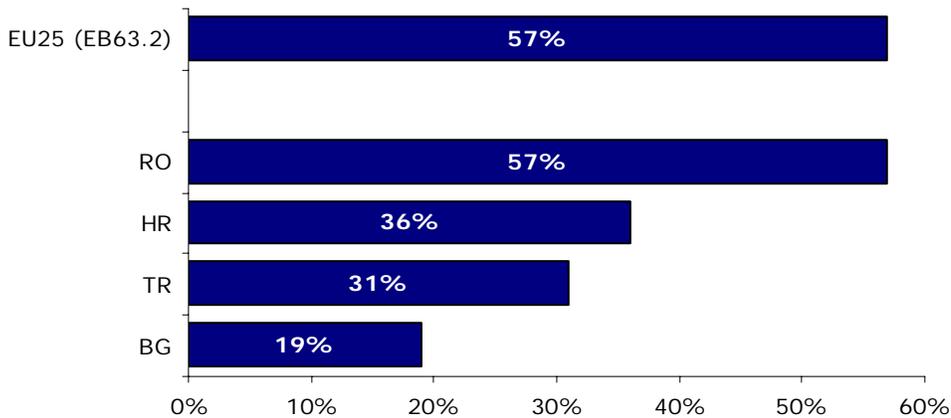
### 3.1.2. The slaughter of farmed animals

#### **-The same level of information in Romania and in the European Union -**

Except in Romania, a minority of interviewees in the acceding and candidate countries know that European Union legislation on the slaughter of farmed animals exists.

It is interesting to note that the rate in Romania is similar to the European Union average. By contrast, Bulgarians (19%), Turks (31%) and Croatians (36%) do not seem very well-informed about the existence of this legislation.

**Q11 From the following subjects related to the welfare\ protection of animals, please indicate the ones for which you believe European Union legislation exists.  
Answer: The slaughter of farmed animals**

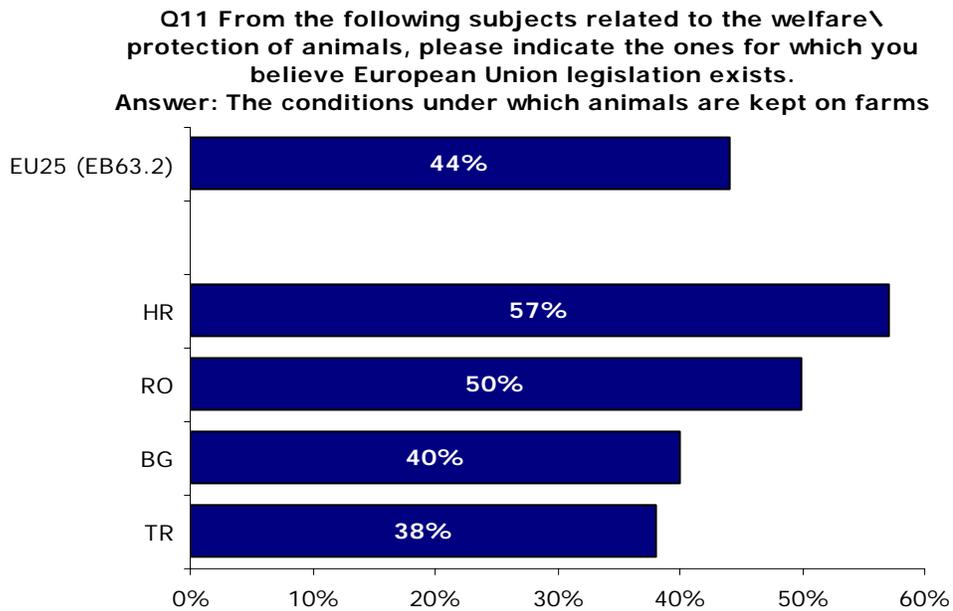


**3.1.3. The conditions under which animals are kept on farms**

**-European legislation better known in the acceding and candidate countries-**

The existence of European legislation which promotes the welfare of farmed animals in terms of the conditions under which they are kept on farms seems to be better known than the two previous ones.

It is interesting to note that in this case, the positive response rates observed in Croatia (57%) and in Romania (50%) are higher than the European average. At the opposite end of the scale, around four in ten respondents in Bulgaria (40%) and Turkey (38%) believe that European legislation exists on this matter, slightly lower than the EU average.



### 3.2. Comparative perceptions of animal welfare

Source: question 12

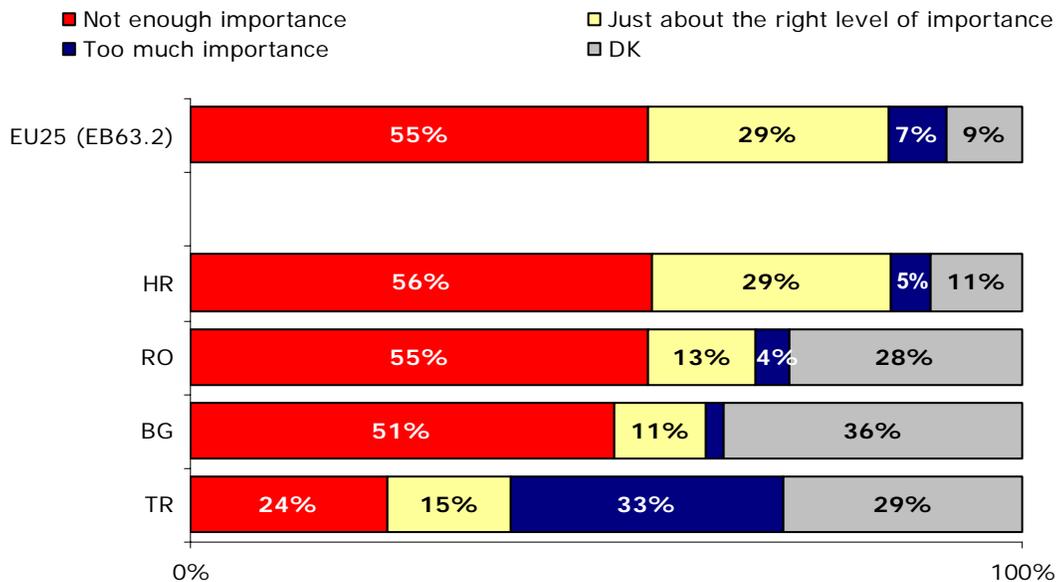
***-Except in Turkey, respondents find that not enough importance is given to animal welfare and protection in the agricultural policies of their country-***

Except in Turkey, a majority of the citizens of the candidate and acceding countries, state that animal welfare/protection does not receive enough importance in the agricultural policy of their countries. This proportion is very close to that observed at the European Union level last year.

Once more the Croatian results are very near to those observed at the EU level. As already noted, the non-response rates are very high in Bulgaria (36%), Turkey (29%) and Romania (28%).

Finally, it should be observed that a third of the Turks (33%) think that too much importance is given to animal welfare/ protection in current food and agricultural policy, while 24% believe that not enough importance is given to this issue. Perhaps this result could be linked to the arrival of avian influenza in Turkey.

**Q12 In (OUR COUNTRY)'s current food and agricultural policy, do you believe that animal welfare\protection receives...?**



### 3.3. The welfare and protection of farmed animals in the European Union

Source: question 13

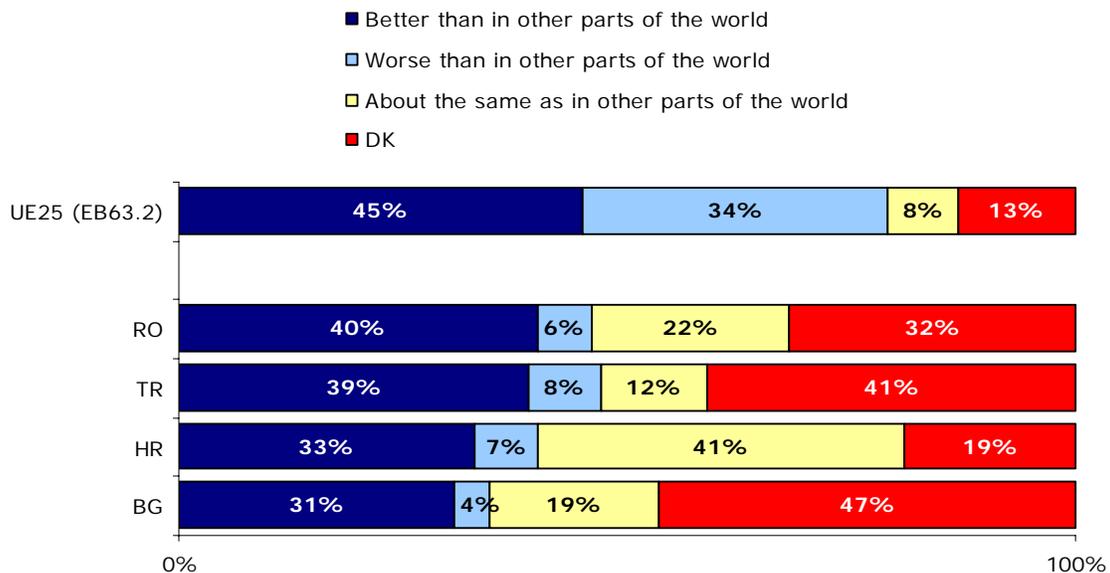
#### ***-Better protection in the European Union-***

Between 30% and 40% of citizens of the candidate and acceding countries believe that the protection of farm animals is better in the European Union than in other parts of the world. Although this percentage is lower than that observed at the European level (45%), it is interesting to note that, in contrast with the EU (34%), very few respondents in the acceding and candidate countries believe that this protection is worse than in other parts of the world. Indeed, only 4% of Bulgarians, 6% of Romanians, 7% of Croatians and 8% of Turks believe that the animal welfare is worse in the EU than in other part of the world.

A large proportion of Croatians (41%) think that the welfare conditions are about the same as in other parts of the world. The results in this country are approximately the same as those observed in many countries of the European Union (cfr. Wave 1 of this survey).

The non-response rates are particularly high in the three other countries: 47% in Bulgaria, 41% in Turkey and 32% in Romania. These high percentages highlight a lack of knowledge of the welfare of farm animals in the European Union.

**Q13 Within the European Union do you believe that the welfare\ protection of farm animals is...?**



## 4. Conclusion

There seem to be various differences in the perception of animal welfare between citizens of the European Union and the candidate and acceding countries. As already observed in the first wave of this survey, the results of this Eurobarometer reveal very distinct realities. While for various questions, **the response rates observed in Croatia are close to the European Union average rates observed in the first wave of this survey, those of the three other countries generally vary significantly.**

**A large proportion of the respondents in the candidate and acceding countries do not seem to take animal welfare into consideration when buying food.** These results are probably linked to a lack of awareness of animal welfare. It should be noted that there are significant difficulties in identifying animal welfare friendly production systems in those countries when buying food.

The amount of attention given to the source of eggs is low and corresponds to **a much lower attention level than in the European Union**, except in Croatia. Concerning eggs, it should also be pointed out that, contrary to the European Union citizens, many people in the candidate and acceding countries are not inclined to accept a price premium to buy eggs sourced from an animal welfare friendly production system.

**Welfare and protection are specific to each species of farmed animal.** In contrast with the EU25 results, we can note that the respondents in the candidate and acceding countries have a more positive opinion of the welfare of laying hens and a more negative opinion of the welfare of dairy cows and pigs. Nevertheless, **the results show that the improvement of the welfare of laying hens, broiler chickens and pigs should be prioritised, as also shown in the first wave of this survey.**

There is contrasting opinion between countries regarding consumers' perceived possible influence on the welfare of farmed animals by their purchasing behaviour. It should be noted that in comparison with the results at the EU25 level, the percentage of those feeling that they are able to make a difference here is lower in the four countries, especially Bulgaria and Romania.

In the acceding and candidates countries, people who have an opinion on the welfare and protection of farm animals are in general inclined to believe that **the protection of farm animals is better in the EU than in their country and in other parts of the world.** It should also be noted that the respondents are in general poorly informed concerning EU legislation on Animal Welfare. Nevertheless, it seems that, except in Turkey, a majority of respondents find that not enough importance is given to animal welfare and protection in the agricultural policies of their countries.

We noticed in the previous wave that visits to farms seem to increase the awareness and concern for animal welfare. **Apart from Croatia the frequency of visits is much lower in most of the acceding and candidate countries compared to the European Union.** It is interesting to note that the results in Croatia to various questions most closely resemble the EU average and respondents in Croatia had visited farms more often than respondents in the other candidate and acceding countries. It should also be pointed out that in most of the questions, the non-response rate was very high. This confirms **the poor knowledge of animal welfare and protection in these countries.**

Finally it is important to recall that the arrival of **avian influenza** in Turkey and in the South-East of Europe towards the end of 2005, could have impacted some results.

# **ANNEXES**

# Tables

QD1 How often do you personally buy food for your household?

	<b>TOTAL</b>	<b>Always</b>	<b>Often</b>	<b>Sometimes</b>	<b>Hardly ever</b>	<b>Never</b>	<b>DK</b>
BG	1002	40%	28%	22%	7%	2%	1%
HR	1000	37%	27%	23%	7%	6%	-
RO	1003	34%	31%	26%	7%	2%	0%
TR	1005	31%	29%	24%	7%	7%	1%

QD2 On a weekly basis, how often do you eat meat (poultry, beef, pork, fish, etc.)?

	TOTAL	Once a week	Two or three times a week	Four or five times a week	More than five times a week	Never	DK
BG	1002	31%	38%	15%	9%	3%	4%
HR	1000	5%	32%	28%	35%	1%	-
RO	1003	23%	38%	18%	18%	1%	2%
TR	1005	51%	28%	4%	4%	10%	3%

QD3 When you purchase meat (poultry, beef, pork, fish, etc.) do you think about the welfare\ protection of the animals from which these meat products have been sourced?

	TOTAL	Yes, most of the time	Yes, some of the time	No, very rarely	No, I never consider it	I never purchase meat (SPONTANEOUS)	DK	Yes	No
BG	1002	9%	16%	17%	42%	12%	3%	25%	59%
HR	1000	7%	16%	19%	47%	10%	1%	23%	66%
RO	1003	19%	21%	15%	31%	9%	4%	41%	46%
TR	1005	26%	31%	9%	24%	3%	6%	57%	33%

QD4 Have you ever visited a farm which rears animals?

	TOTAL	Yes, once	Yes, two or three times	Yes, more than three times	No, never	DK	Yes
BG	1002	9%	11%	28%	49%	2%	48%
HR	1000	11%	14%	37%	36%	1%	62%
RO	1003	11%	9%	21%	57%	3%	40%
TR	1005	10%	8%	17%	62%	3%	36%

QD5 In your opinion, from the following list, for which three farm animals should the current level of welfare\ protection be improved the most? (ROTATE – MAX. 3 ANSWERS)

	TOTAL	Laying hens, kept for egg production	Broilers, chickens kept for meat production	Turkeys	Ducks\ geese	Dairy cows	Beef cattle	Calves	Pigs	Fur animals	Farmed fish	Horses	Rabbits	Sheep	All of the above (SPONTANEOUS)	None of the above (SPONTANEOUS)	DK
BG	1002	53%	51%	27%	26%	48%	29%	35%	52%	-	30%	25%	27%	31%	23%	1%	20%
HR	1000	50%	36%	20%	17%	36%	30%	26%	44%	-	21%	25%	21%	21%	13%	5%	11%
RO	1003	55%	53%	26%	24%	50%	35%	28%	56%	-	27%	25%	24%	27%	22%	3%	17%
TR	1005	62%	64%	17%	19%	52%	45%	20%	-	17%	21%	17%	18%	45%	14%	1%	5%

QD6 When purchasing eggs, meat or milk can you easily identify from the label those products sourced from animal welfare friendly production systems?

	TOTAL	Yes, most of the time	Yes, some of the time	No, very rarely	No, never	DK\ NOT APPLICABLE	Yes	No
BG	1002	4%	4%	13%	62%	18%	8%	75%
HR	1000	9%	12%	17%	49%	13%	21%	66%
RO	1003	15%	16%	20%	31%	19%	31%	50%
TR	1005	-	-	32%	44%	23%	-	77%

QD7 Do you believe that buying animal welfare friendly products could have a positive impact on the welfare\ protection of farm animals?

	<b>TOTAL</b>	<b>Yes, certainly</b>	<b>Yes, probably</b>	<b>No, probably not</b>	<b>No, certainly not</b>	<b>DK</b>	<b>Yes</b>	<b>No</b>
BG	1002	14%	25%	16%	13%	32%	39%	29%
HR	1000	29%	39%	12%	7%	14%	67%	19%
RO	1003	14%	31%	10%	9%	36%	45%	19%
TR	1005	25%	38%	7%	8%	22%	63%	15%

QD8.1 In general, how would you rate the welfare\protection of the following farmed animals?

Laying hens (producing eggs)

	<b>TOTAL</b>	<b>Very good</b>	<b>Fairly good</b>	<b>Fairly bad</b>	<b>Very bad</b>	<b>DK</b>	<b>Good</b>	<b>Bad</b>
BG	1002	4%	35%	16%	7%	39%	39%	22%
HR	1000	9%	36%	27%	14%	14%	45%	41%
RO	1003	5%	42%	20%	5%	27%	47%	25%
TR	1005	19%	36%	9%	11%	25%	54%	20%

QD8.2 In general, how would you rate the welfare\protection of the following farmed animals?

Dairy cows (producing milk)

	<b>TOTAL</b>	<b>Very good</b>	<b>Fairly good</b>	<b>Fairly bad</b>	<b>Very bad</b>	<b>DK</b>	<b>Good</b>	<b>Bad</b>
BG	1002	4%	34%	17%	7%	38%	38%	24%
HR	1000	7%	41%	27%	10%	15%	48%	36%
RO	1003	5%	39%	21%	6%	29%	45%	27%
TR	1005	19%	35%	10%	11%	26%	54%	21%

QD8.3 In general, how would you rate the welfare\protection of the following farmed animals?

Pigs (producing meat)  
(NOT ASK IN TR)

	<b>TOTAL</b>	<b>Very good</b>	<b>Fairly good</b>	<b>Fairly bad</b>	<b>Very bad</b>	<b>DK</b>	<b>Good</b>	<b>Bad</b>
BG	1002	3%	30%	20%	7%	40%	33%	27%
HR	1000	7%	35%	29%	14%	15%	42%	42%
RO	1003	4%	36%	23%	7%	30%	40%	30%

QD8.4 In general, how would you rate the welfare\protection of the following farmed animals?

Fur animals

(ASK ONLY IN TR)

	<b>TOTAL</b>	<b>Very good</b>	<b>Fairly good</b>	<b>Fairly bad</b>	<b>Very bad</b>	<b>DK</b>	<b>Good</b>	<b>Bad</b>
TR	1005	14%	15%	9%	10%	51%	30%	19%

QD9 When you buy eggs do they mostly come from hens kept...?

	TOTAL	In battery cage production systems	In other caged production systems (cages with a perch, dust-bath and nest, etc.)	In non-caged indoor systems (barns, etc.)	In free-range systems or outside	I don't buy hens' eggs (SPONTANEOUS)	I do not pay attention to the type of system (SPONTANEOUS)	DK
BG	1002	6%	1%	2%	9%	26%	32%	25%
HR	1000	23%	2%	6%	21%	21%	15%	12%
RO	1003	11%	4%	4%	5%	21%	21%	33%
TR	1005	18%	7%	12%	13%	2%	18%	30%

QD10 What additional price premium would you be willing to pay for hen's eggs sourced from an animal welfare friendly production system?

	TOTAL	No additional price premium	An additional 5%	An additional 10%	An additional 25%	More than an additional 25%	DK\ NOT APPLICABLE
BG	1002	45%	15%	6%	1%	0%	34%
HR	1000	40%	22%	14%	5%	3%	16%
RO	1003	29%	10%	3%	1%	2%	55%
TR	1005	55%	14%	8%	2%	1%	20%

QD11 From the following subjects related to the welfare\ protection of animals, please indicate the ones for which you believe European Union legislation exists. (MULTIPLE ANSWERS POSSIBLE)

	<b>TOTAL</b>	<b>The transport of farmed animals</b>	<b>The slaughter of farmed animals</b>	<b>The conditions under which animals are kept on farms</b>	<b>DK</b>
BG	1002	17%	19%	40%	52%
HR	1000	36%	36%	57%	30%
RO	1003	38%	57%	50%	32%
TR	1005	25%	31%	38%	48%

QD12 In (OUR COUNTRY)'s current food and agricultural policy, do you believe that animal welfare\protection receives...?

	<b>TOTAL</b>	<b>Too much importance</b>	<b>Not enough importance</b>	<b>Just about the right level of importance</b>	<b>DK</b>
BG	1002	2%	51%	11%	36%
HR	1000	5%	56%	29%	11%
RO	1003	4%	55%	13%	28%
TR	1005	33%	24%	15%	29%

QD13 Within the European Union do you believe that the welfare\ protection of farm animals is...?

	<b>TOTAL</b>	<b>Better than in other parts of the world</b>	<b>Worse than in other parts of the world</b>	<b>About the same as in other parts of the world</b>	<b>DK</b>
BG	1002	31%	4%	19%	47%
HR	1000	33%	7%	41%	19%
RO	1003	40%	6%	22%	32%
TR	1005	39%	8%	12%	41%

# **Technical note**

## SPECIAL EUROBAROMETER N°229(2)

### “Attitude of consumers towards the welfare of farmed animals”

#### TECHNICAL SPECIFICATIONS

Between the 7<sup>th</sup> of December 2005 and the 11<sup>st</sup> of January 2006, TNS Opinion & Social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 64.4 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General Press and Communication, Opinion Polls.

The SPECIAL EUROBAROMETER N°229(2) is part of wave 64.4 and covers the population aged 15 years and over. The SPECIAL EUROBAROMETER N°229(2) has been conducted in the two acceding countries (Bulgaria and Romania) and in the two candidate countries (Croatia and Turkey). In these countries, the survey covers the national population of citizens of the respective nationalities and the population of citizens of all the European Union Member States that are residents in those countries and have a sufficient command of one of the respective national language(s) to answer the questionnaire. The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the “administrative regional units”, after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard “random route” procedures, from the initial address. In each household, the respondent was drawn, at random (following the “closest birthday rule”). All interviews were conducted face-to-face in people’s homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

ABBREVIATIONS	COUNTRIES	INSTITUTES	NUMBER OF INTERVIEWS	FIELDWORK DATES		POPULATION AGED 15 AND MORE
BG	Bulgaria	TNS BBSS	1.002	16/12/2005	28/12/2005	6.695.512
HR	Croatia	Puls	1.000	09/12/2005	30/12/2005	3.682.826
RO	Romania	TNS CSOP	1.003	10/12/2005	07/01/2006	18.145.036
TR	Turkey	TNS PIAR	1.005	10/12/2005	04/01/2006	47.583.830
TOTAL			4.010	07/12/2005	11/01/2006	76.107.204

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

<b>Observed percentages</b>	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
<b>Confidence limits</b>	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points

# Questionnaire

Now, moving on another topic.

ASK QD ONLY IN BG, RO, HR and TR

NOTE FOR TR: When "pork" is given as example, please replace by "fur animals"

QD1 How often do you personally buy food for your household?

(READ OUT - ONE ANSWER ONLY)

	<b>(594)</b>
Always	1
Often	2
Sometimes	3
Hardly ever	4
Never	5
DK	6

EB63.2 QC1

QD2 On a weekly basis, how often do you eat meat (poultry, beef, pork, fish, etc.)?

(READ OUT - ONE ANSWER ONLY)

	<b>(595)</b>
Once a week	1
Two or three times a week	2
Four or five times a week	3
More than five times a week	4
Never	5
DK	6

EB63.2 QC2

Passons maintenant à un autre sujet.

POSER QD UNIQUEMENT EN BG, RO, HR et TR

NOTE POUR TR : Quand "le porc" est donné comme exemple, veuillez remplacer par "les animaux à fourrure"

QD1 Dans quelle mesure achetez-vous personnellement de la nourriture pour votre ménage ?

(LIRE - UNE SEULE REPONSE)

	<b>(594)</b>
Toujours	1
Souvent	2
Quelques fois	3
Presque jamais	4
Jamais	5
NSP	6

EB63.2 QC1

QD2 Combien de fois par semaine mangez-vous de la viande (volaille, charcuteries, poisson, etc.) ?

(LIRE - UNE SEULE REPONSE)

	<b>(595)</b>
Une fois par semaine	1
Deux ou trois fois par semaine	2
Quatre ou cinq fois par semaine	3
Plus de cinq fois par semaine	4
Jamais	5
NSP	6

EB63.2 QC2

QD3 When you purchase meat (poultry, beef, pork, fish, etc.) do you think about the welfare/protection of the animals from which these meat products have been sourced?

QD3 Quand vous achetez de la viande (volaille, charcuteries, poisson, etc.), pensez-vous au bien-être \ à la protection des animaux dont elle est issue ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

<b>(596)</b>	
Yes, most of the time	1
Yes, some of the time	2
No, very rarely	3
No, I never consider it	4
I never purchase meat (SPONTANEOUS)	5
DK	6

<b>(596)</b>	
Oui, la plupart du temps	1
Oui, parfois	2
Non, très rarement	3
Non, je n'y pense jamais	4
Je n'achète jamais de la viande (SPONTANE)	5
NSP	6

EB63.2 QC3

EB63.2 QC3

QD4 Have you ever visited a farm which rears animals?

QD4 Avez-vous déjà visité une ferme d'élevage d'animaux ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

<b>(597)</b>	
Yes, once	1
Yes, two or three times	2
Yes, more than three times	3
No, never	4
DK	5

<b>(597)</b>	
Oui, une fois	1
Oui, deux ou trois fois	2
Oui, plus de trois fois	3
Non, jamais	4
NSP	5

EB63.2 QC4

EB63.2 QC4

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QD5 In your opinion, from the following list, for which three farm animals should the current level of welfare\protection be improved the most?

QD5 Et, d'après vous, parmi la liste suivante, quelles sont les trois espèces d'animaux d'élevage pour lesquelles on devrait le plus améliorer le bien-être \ la protection actuel(le) ?

(SHOW CARD – READ OUT – ROTATE ITEMS – MAX. 3 ANSWERS)

(MONTRER CARTE – LIRE – ROTATION DES ITEMS – MAX. 3 REPONSES)

	(598-613)
Laying hens, kept for egg production	1,
Broilers, chickens kept for meat production	2,
Turkeys	3,
Ducks\geese	4,
Dairy cows	5,
Beef cattle	6,
Calves	7,
(NOT IN TR) Pigs	8,
(ONLY IN TR) Fur animals	9,
Farmed fish	10,
Horses	11,
Rabbits	12,
Sheep	13,
All of the above (SPONTANEOUS)	14,
None of the above (SPONTANEOUS)	15,
DK	16,

	(598-613)
Les poules, élevées pour la production d'oeufs	1,
Les poulets, élevés pour la production de viande	2,
Les dindes	3,
Les canards \ les oies	4,
Les vaches laitières	5,
Les boeufs de boucherie	6,
Les veaux	7,
(PAS EN TR) Les porcs	8,
(SEULEMENT EN TR) Les animaux à fourrure	9,
Les poissons d'élevage	10,
Les chevaux	11,
Les lapins	12,
Les moutons	13,
Tous ceux-ci (SPONTANE)	14,
Aucun de ceux-ci (SPONTANE)	15,
NSP	16,

EB63.2 QC5
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EB63.2 QC5
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QD6 When purchasing eggs, meat or milk can you easily identify from the label those products sourced from animal welfare friendly production systems?

QD6 Quand vous achetez des oeufs, de la viande ou du lait, pouvez-vous identifier facilement sur l'étiquette les produits provenant de systèmes d'élevage soucieux du bien-être des animaux ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

	(614)
Yes, most of the time	1
Yes, some of the time	2
No, very rarely	3
No, never	4
DK\NOT APPLICABLE	5

	(614)
Oui, la plupart du temps	1
Oui, parfois	2
Non, très rarement	3
Non, jamais	4
NSP \ PAS APPLICABLE	5

EB63.2 QC6
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EB63.2 QC6
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QD7 Do you believe that buying animal welfare friendly products could have a positive impact on the welfare\protection of farm animals?

QD7 Pensez-vous que votre décision d'acheter des produits provenant de systèmes d'élevage soucieux du bien-être des animaux peut avoir un impact positif sur le bien-être \ la protection des animaux d'élevage ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

	(615)
Yes, certainly	1
Yes, probably	2
No, probably not	3
No, certainly not	4
DK	5

	(615)
Oui, certainement	1
Oui, probablement	2
Non, probablement pas	3
Non, certainement pas	4
NSP	5

EB63.2 QC7

EB63.2 QC7

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QD8 In general, how would you rate the welfare\protection of the following farmed animals?

QD8 En général, comment jugeriez-vous le bien-être \ la protection des animaux d'élevage suivants ?

(SHOW CARD – ROTATE ITEMS – ONE ANSWER PER LINE)

(MONTRER CARTE – ROTATION DES ITEMS – UNE REPONSE PAR LIGNE)

(READ OUT)	Very good	Fairly good	Fairly bad	Very bad	DK
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(LIRE)	Très bon(ne)	Plutôt bon(ne)	Plutôt mauvais(e)	Très mauvais(e)	NSP
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(616)	1	Laying hens (producing eggs)	1	2	3	4	5
(617)	2	Dairy cows (producing milk)	1	2	3	4	5
(618)	3	(NOT IN TR) Pigs (producing meat)	1	2	3	4	5
(619)	4	(ONLY IN TR) Fur animals	1	2	3	4	5

(616)	1	Les poules pondeuses (œufs)	1	2	3	4	5
(617)	2	Les vaches laitières (lait)	1	2	3	4	5
(618)	3	(PAS EN TR) Les porcs (viande)	1	2	3	4	5
(619)	4	(SEULEMENT EN TR) Les animaux à fourrure	1	2	3	4	5

EB63.2 QC8

EB63.2 QC8

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QD9 When you buy eggs do they mostly come from hens kept...?

QD9 Quand vous achetez des oeufs, ils proviennent principalement de poules élevées ... ?

(READ OUT – ROTATE ITEMS – ONE ANSWER ONLY)

(LIRE – ROTATION DES ITEMS – UNE SEULE REPONSE)

	<b>(620)</b>
in battery cage production systems	1
in other caged production systems (cages with a perch, dust-bath and nest, etc.)	2
in non-caged indoor systems (barns, etc.)	3
in free-range systems or outside	4
I don't buy hens' eggs (SPONTANEOUS)	5
I do not pay attention to the type of system (SPONTANEOUS)	6
DK	7

	<b>(620)</b>
dans des systèmes de production en batterie	1
dans d'autres systèmes de production en cage (cages modifiées avec perchoirs, bains de poussière, nids, etc.)	2
dans d'autres systèmes d'intérieur mais pas en cage (granges, etc.)	3
dans des systèmes en extérieur ou en plein air	4
Je n'achète pas d'œufs (SPONTANE)	5
Je ne fais pas attention à cela (SPONTANE)	6
NSP	7

EB63.2 QC9

EB63.2 QC9

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QD10 What additional price premium would you be willing to pay for hen's eggs sourced from an animal welfare friendly production system?

QD10 Quelle augmentation de prix seriez-vous prêt(e) à payer pour des oeufs provenant d'un système de production soucieux du bien-être des animaux ?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(MONTRER CARTE – LIRE – UNE SEULE REPONSE)

	<b>(621)</b>
No additional price premium	1
An additional 5%	2
An additional 10%	3
An additional 25%	4
More than an additional 25%	5
DK\NOT APPLICABLE	6

	<b>(621)</b>
Aucune augmentation de prix	1
Une augmentation de 5%	2
Une augmentation de 10%	3
Une augmentation de 25%	4
Une augmentation supérieure à 25%	5
NSP \ PAS APPLICABLE	6

EB63.2 QC10

EB63.2 QC10

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QD11 From the following subjects related to the welfare\protection of animals, please indicate the ones for which you believe European Union legislation exists.

QD11 Parmi les domaines suivants liés aux bien-être \ à la protection des animaux d'élevage, veuillez indiquer ceux pour lesquels vous estimez qu'il existe une législation au niveau de l'Union Européenne.

(SHOW CARD – READ OUT– MULTIPLE ANSWERS POSSIBLE)

(MONTRER CARTE – LIRE – PLUSIEURS REPONSES POSSIBLES)

	(622-625)
The transport of farmed animals	1,
The slaughter of farmed animals	2,
The conditions under which animals are kept on farms	3,
DK	4,

	(622-625)
Le transport des animaux d'élevage	1,
L'abattage des animaux d'élevage	2,
Les conditions dans lesquelles les animaux sont élevés dans les fermes	3,
NSP	4,

EB63.2 QC11
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EB63.2 QC11
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QD12 In (OUR COUNTRY)'s current food and agricultural policy, do you believe that animal welfare\protection receives...?

QD12 Quelle importance diriez-vous qu'a le bien-être \ la protection des animaux dans la politique agricole et alimentaire actuelle de (NOTRE PAYS) ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

	(626)
too much importance	1
not enough importance	2
just about the right level of importance	3
DK	4

	(626)
Trop d'importance	1
Pas assez d'importance	2
Juste ce qu'il faut	3
NSP	4

EB63.2 QC12
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EB63.2 QC12
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QD13 Within the European Union do you believe that the welfare\protection of farm animals is...?

QD13 Pensez-vous que le bien-être \ la protection des animaux de ferme au sein de l'Union Européenne est ... ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

	(627)
better than in other parts of the world	1
worse than in other parts of the world	2
about the same as in other parts of the world	3
DK	4

	(627)
meilleur(e) que dans d'autres parties du monde	1
plus mauvais(e) que dans d'autres parties du monde	2
plus ou moins le(la) même que dans d'autres parties du monde	3
NSP	4

EB63.2 QC13
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EB63.2 QC13
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