

Attitudes of EU citizens towards Animal Welfare

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This document does not represent the point of view of the European Commission.
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INTRODUCTION

As part of European Union policy on food safety, the European Commission has demonstrated a clear commitment to the welfare of farmed animals for a considerable period of time.

The first EU legislation on this matter was enacted in 1974 and, more recently, the 1999 Amsterdam Treaty introduced to the EC Treaty a specific 'Protocol on protection and welfare of animals'. In January 2006, the Commission adopted a Community Action Plan for the protection and welfare of animals for the period 2006-2010¹.

This notes the increasing appreciation of EU citizens for high welfare standards, and the consequent importance of Commission policy in regulating and supporting agriculture to meet these needs. More specifically, it makes a commitment to further research, aims to create an international consensus on the matter, and speaks of the need for labelling schemes to enable consumers to make informed choices.

The EC is keen to gather information on public opinion and behaviour in this field, and in 2005 published a report on 'Attitudes of consumers towards the welfare of farmed animals'². This covers issues such as knowledge of farming conditions, purchasing behaviour and perceptions of legislation relating to animal welfare.

This forms the background to the current survey, commissioned by the European Commission's Health and Consumer Protection Directorate General.

This survey was carried out by TNS Opinion & Social, interviewing 29,152 citizens in the 25 Member States and 4 accession and candidate countries between 6 September and 10 October 2006. Since Romania and Bulgaria were not EU Member States at the time, they have not been included in the EU figure which gives an average result for the EU25. The methodology used is that of Eurobarometer surveys as carried out by the Directorate General for Communication (Unit for Public Opinion and Media Monitoring). A technical note on the manner in which interviews were conducted by the Institutes within the TNS Opinion & Social network is appended as an annex to this report. This note indicates the interview methods and the confidence intervals.

This report examines the following themes in turn:

- The importance of animal welfare in the public mind
- Knowledge of animal welfare
- Perceptions of national animal welfare standards
- The impact of higher animal welfare standards on producers
- Consumer shopping habits and labelling

¹ *Communication from the Commission to the European Parliament and the Council on a Community Action Plan on the Protection and Welfare of Animals 2006-2010*, COM(2006) 13 final, 23/01/06. http://ec.europa.eu/food/animal/welfare/com_action_plan230106_en.pdf

² *Attitudes of Consumers Towards the Welfare of Farmed Animals*, Special Eurobarometer 229 (June 2005). http://ec.europa.eu/public_opinion/archives/ebs/ebs_229_en.pdf
For results and analysis concerning Croatia, Bulgaria, Romania and Turkey, see *Attitudes of Consumers Towards the Welfare of Farmed Animals*, Special Eurobarometer 229 (2) (March 2007) [http://ec.europa.eu/food/animal/welfare/survey/index_en.htm]

For each of these points, we analyse the results in terms of the European average, before then considering the breakdown of results by country and by socio-demographic variables where relevant³.

In addition to this, we have systematically cross-analysed the responses to all the questions with additional classification variables, specifically:

- Question 1, on the knowledge of conditions under which animals are farmed in the respondent's country.
- Question 2, on the desire to be more informed about conditions under which animals are farmed in the respondent's country.
- Question 4, on the importance of protecting the welfare of farmed animals.
- Question 5, on the need to improve welfare protection in the respondent's country.

³ Tables for all questions can be found in the annexes. The totals indicated may show a one point difference with the sum of the individual units. It should also be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility to give several answers to the same question.

1. The importance of animal welfare

The Community Action Plan on the protection and welfare of animals notes that there has been a 'clear shift of public attitudes towards animals over recent decades', with consumers becoming increasingly more concerned about the implications of farming for the health and welfare of animals involved⁴. This is reflected in the results of this survey, with European Union citizens clearly of the view that this is a highly important issue.

– Animal welfare is seen as a matter of great importance –

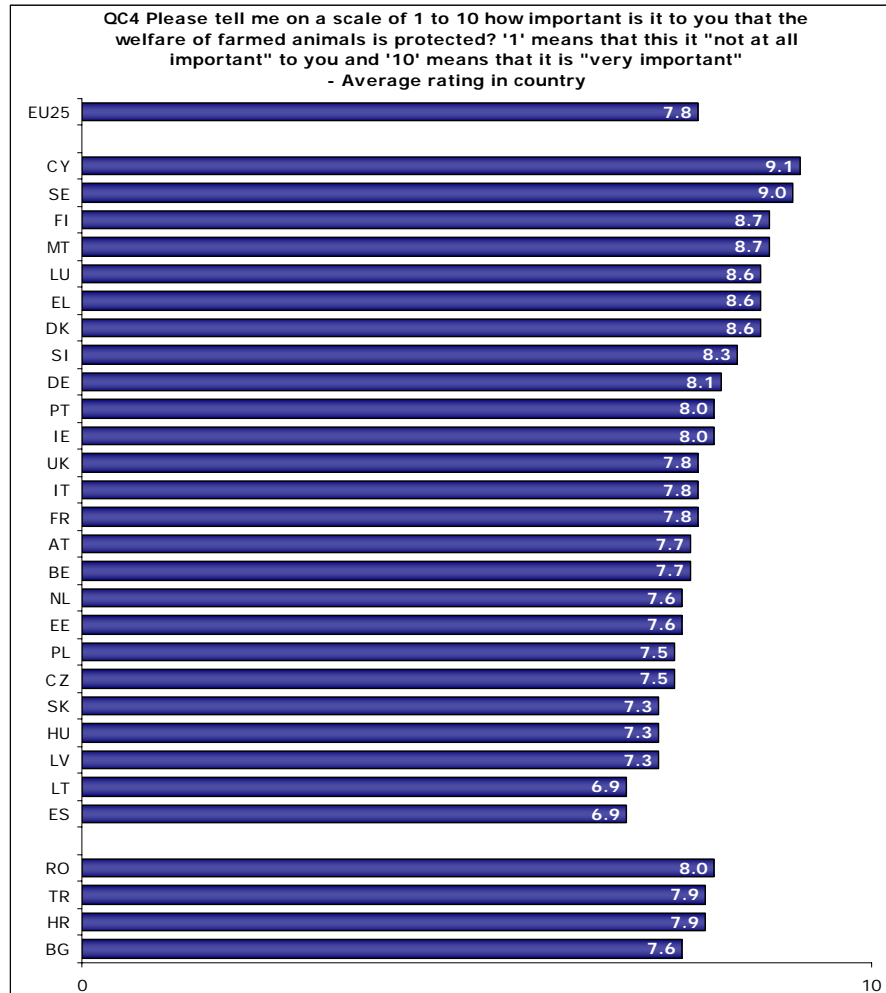
QC4. Please tell me on a scale of 1-10 how important is it to you that the welfare of farmed animals is protected?

Respondents were asked the level of importance that they personally assign to the protection of farmed animal welfare on a scale from 1 to 10. Here, **a considerable majority of respondents answer towards the higher end of the scale**. Over a third (34%) say that animal welfare is of the highest possible importance (10 out of 10) to them whilst only one in twenty (2%) claim it is not at all important.

Overall, the **average rating given was marginally under eight (7.8)**. The subject is seen as slightly more important in the countries of the EU15 (7.8) than in the ten new Member States (7.5).

Safeguarding welfare during production takes on the greatest importance in the Scandinavian countries, with respondents in Sweden (9.0), Finland (8.7) and Denmark (8.6) all giving above-average ratings. This is also a feature of certain Mediterranean countries with Cypriot (9.1), Maltese (8.7) and Greek (8.6) respondents also giving strong personal endorsement to the principle of animal welfare. Finally, a similar level of opinion is expressed by respondents polled in Luxembourg (8.6).

⁴ Commission Working Document on a Community Action Plan on the Protection and Welfare of Animals 2006-2010, 23/01/06, COM (2006) 14 final, p.11.
http://ec.europa.eu/food/animal/welfare/work_doc_strategic_basis230106_en.pdf



There are no countries where public opinion on the importance of welfare runs counter to that seen at a European level. However, there are a small group of countries where the level of importance we see elsewhere is tempered somewhat. This comprises of Hungary, Slovakia, Latvia (each 7.3), Lithuania and Spain (both 6.9).

This high level of importance we see given to the subject is in line with previous surveys. For example, in the previous survey on this issue, 55% of EU citizens said that they believe animal welfare and protection does not receive enough importance in their country's agricultural policy. Only 7% said that this receives too much attention⁵. Similarly in a poll conducted in 2005, 82% said that they agreed humanity has a duty to protect the rights of animals, whatever the cost⁶. Clearly, this is an issue which many EU citizens care about.

The EU publics' views on the importance of this subject are unrelated to social or demographic factors. For example, it may be hypothesised that we

⁵ *Attitudes of Consumers Towards the Welfare of Farmed Animals*, Special Eurobarometer 229 (June 2005), p.64.

⁶ *Social values, Science & Technology*, Special Eurobarometer 225 (June 2005), p.26. http://ec.europa.eu/public_opinion/archives/ebs/ebs_225_report_en.pdf

would see a differing importance of animal welfare in rural areas due to current or historical involvement in farming. This proves not to be the case with respondents in large towns answering almost identically to those in rural villages (7.7 and 7.8 respectively). It should also be noted that this is an area in which opinion is apolitical, with those at the left and right of the political spectrum believing this to be an important issue to exactly the same extent (7.8).

Average rating of animal welfare importance: Analysis by demographics and other opinions

Please tell me on a scale of 1-10 how important is it to you that the welfare of farmed animals is protected?

[Average rating within subgroup]

	Average
EU25	7.8
Left-Right scale	
(1-4) Left	7.8
(5-6) Centre	7.8
(7-10) Right	7.8
Subjective urbanisation	
Rural village	7.8
Small/ mid size town	7.7
Large town	7.7
Farming conditions knowledge	
A lot	8.6
A little	7.9
None	7.0
Desire to be more informed	
Yes	8.3
No	7.0
Need to improve welfare	
Yes	8.1
No	6.6

It seems to be, therefore, that the importance of animal welfare in the public mind is determined more by personal opinions than by background socio-demographic factors.

The view that animal welfare is an important matter is linked to other opinions on the subject. In particular, **those who feel they are especially knowledgeable about the conditions of farmed animals⁷, and those who believe there is a need to improve these conditions⁸ are more likely to see welfare as an important issue.**

Overall, however, it remains the case that the general feeling is that this is an important issue - even amongst those possessing little knowledge or who see no need for improvement.

⁷ QC1: Could you tell me how much do you feel you know about the conditions under which animals are farmed in [OUR COUNTRY]? Would you say that you know...?'

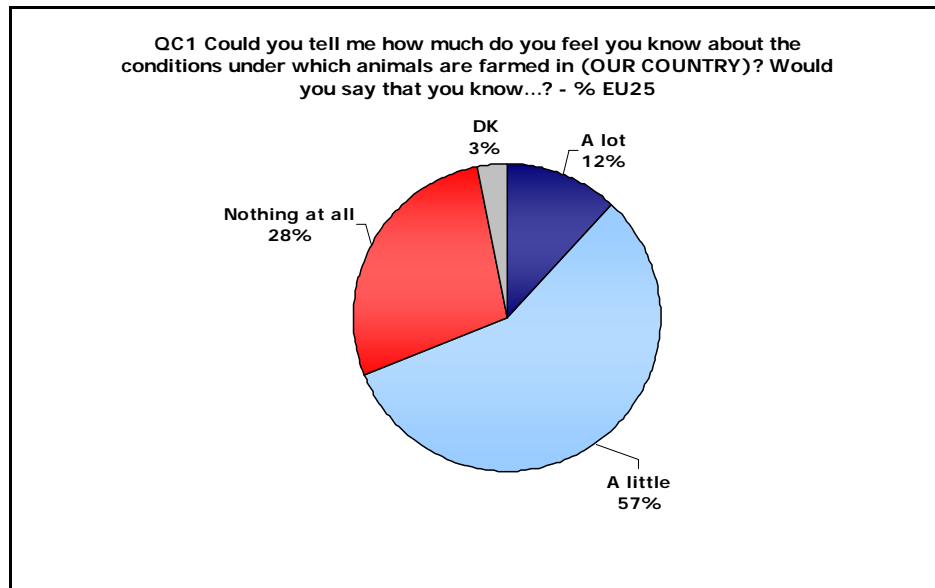
⁸ QC5: Do you believe that in general the welfare-protection of farm animals in [OUR COUNTRY] needs to be improved?

2. Knowledge of animal welfare

2.1 Knowledge of conditions

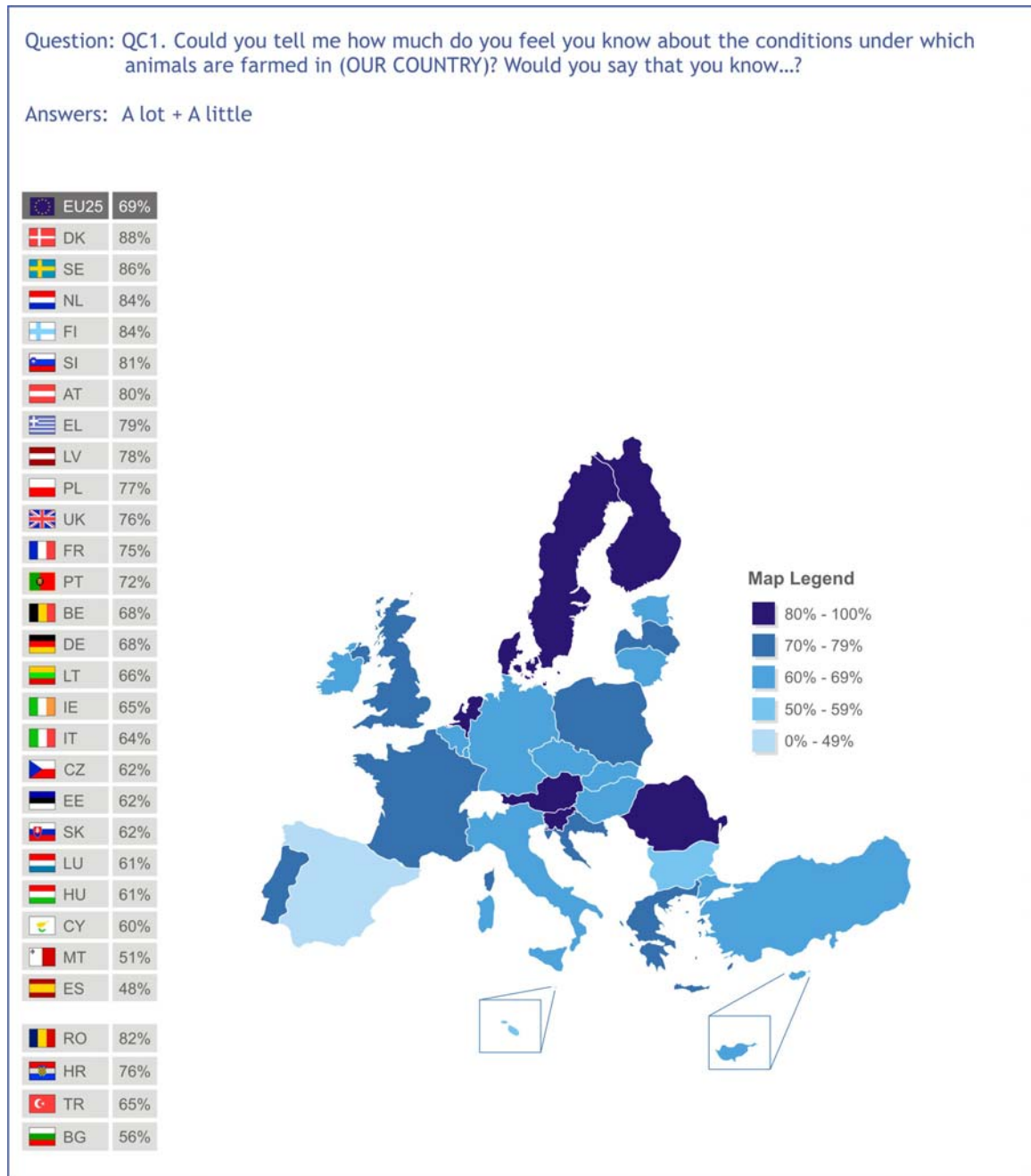
QC1. Could you tell me how much do you feel you know about the conditions under which animals are farmed in (OUR COUNTRY)?

– Most claim to have at least a degree of knowledge of national conditions, but that this is limited –



Around seven-tenths (69%) of EU citizens claim to have some knowledge of the conditions under which animals are farmed in their country. However, few are fully confident in the extent of this knowledge with only 12% saying they know 'a lot' on this matter. Rather, the majority (57%) say that they possess 'a little' knowledge with 28% claiming to know 'nothing at all'.

At the level of individual countries we see a greater degree of variation compared with the general homogeneity of opinion on the importance of animal welfare noted in the first chapter.



Respondents in the **Nordic countries exhibit the highest levels of claimed knowledge** of all. Almost 9 out of every 10 (88%) Danes said they possessed at least some knowledge, with the corresponding figure for Swedes (86%) and Finns (84%) nearly as high. Other countries featuring particularly knowledgeable populations are the Netherlands (84%), Romania (82%), Slovenia (81%) and Austria (80%).

Conversely, knowledge is at its lowest in Spain, where almost half of the population (49%) say they know nothing at all about conditions in their own country. This figure is almost as high amongst Maltese respondents (45%) and in both these countries represents the most common response. Elsewhere, there are substantial minorities in Hungary, Bulgaria, the Czech Republic, Cyprus and Luxembourg of over a third of the population who say they have no knowledge at all in this area.

This pattern of differing levels of knowledge by country reflects the results of an earlier special Eurobarometer conducted in Spring 2005 where respondents were asked whether they had ever visited a farm which rears animals⁹. With some exceptions, the countries where a relatively high proportion said they had made such visits are also the countries where, in this survey, we see high levels of claimed knowledge.

For example, respondents from the Nordic countries – which show some of the highest levels of claimed knowledge - were considerably more likely than other EU citizens to have visited a farm, with less than 1 in 10 in Finland, Sweden and Denmark saying they had never done so.

By contrast over half of all Cypriots claimed to have never visited a farm, and over 40% of Bulgarians, Spaniards, Czechs, Hungarians and Luxembourgers fall into the same category. These are all countries where claimed knowledge of welfare conditions is considerably lower than the EU average.

It seems therefore that knowledge in this area is particularly related to familiarity with farming conditions.

– Knowledge levels partly linked to age, education and urbanisation –

We have already seen that social and demographic factors are of little importance regarding views on the importance of animal welfare. However, when it comes to the question of knowledge on the subject, we see a different pattern, with **education, age and subjective urbanisation all exerting influence**.

As would be reasonably expected, there is a link between respondents' degree of education and their knowledge of welfare conditions, with those continuing education to the age of 20 and beyond the most likely (76%) to claim at least some knowledge and those ending their studies at 15 the least likely (65%).

⁹ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), p.4; For Bulgarian results see *Attitudes of Consumers Towards the Welfare of Farmed Animals*, Special Eurobarometer 229 (2) (March 2007) [http://ec.europa.eu/food/animal/welfare/survey/index_en.htm]

Knowledge of farming conditions: Analysis by demographics and other opinions

Could you tell me how much do you feel you know about the conditions under which animals are farmed in (OUR COUNTRY)?

	A lot	A little	Nothing at all	DK
EU25	12%	57%	28%	3%
Education (End of)				
15	11%	54%	31%	4%
16-19	12%	58%	27%	2%
20+	15%	61%	21%	2%
Still Studying	9%	54%	34%	3%
Respondent occupation scale				
Self- employed	19%	55%	24%	2%
Managers	15%	61%	21%	3%
Other white collars	10%	60%	28%	2%
Manual workers	11%	59%	28%	3%
House persons	8%	53%	35%	4%
Unemployed	15%	51%	32%	2%
Retired	14%	59%	24%	3%
Students	9%	54%	34%	3%
Subjective urbanisation				
Rural village	17%	57%	25%	2%
Small/ mid size town	10%	60%	27%	3%
Large town	11%	53%	32%	3%
Desire to be more informed				
Yes	14%	64%	21%	1%
No	12%	50%	36%	3%

NB: As explained in the introduction, the sum of the individual units sometimes differs from 100% because of rounding

Linked to this, we see high levels of self-perceived knowledge amongst managerial respondents (76%, 15% a lot and 61% a little) and the self-employed (74%), with house persons (61%) claiming the least knowledge. It is also relatively low amongst students, reflecting the fact that respondents in the 15-24 age bracket also claim lower than average knowledge (both categories 63%).

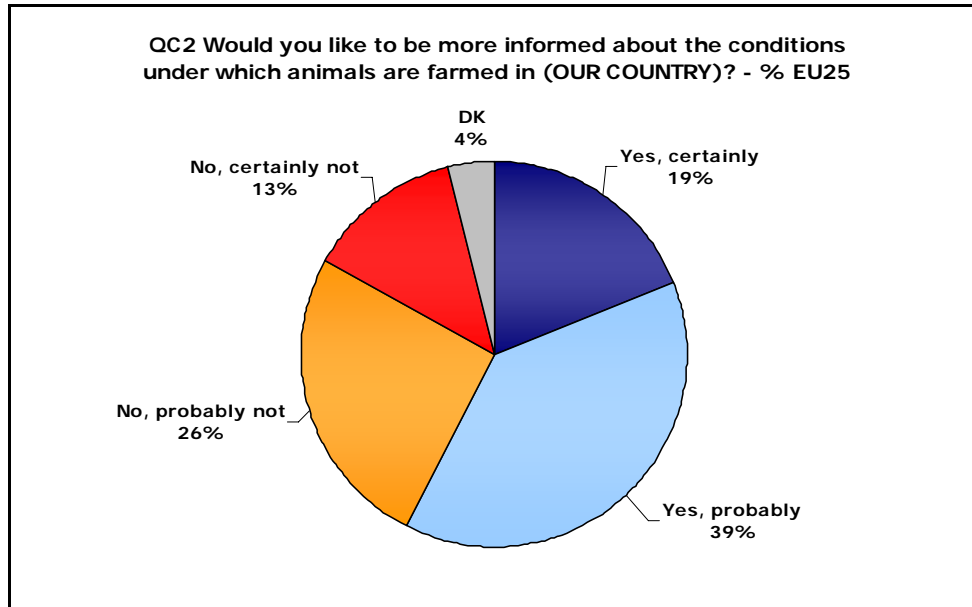
Finally, knowledge of national conditions is higher amongst rural populations. Almost three-quarters (74%) of people living in a village setting claimed to know at least a little with this proportion falling to just under two-thirds (64%) of those based in a large town. Thus whilst urbanites see welfare as just as important as those who live in the countryside, they are less familiar with exact conditions.

In terms of links with other opinions and beliefs, there is a strong relationship between existing knowledge and the desire to be more informed, an issue explored in detail in the following section.

2.2 Desire for more information

QC2. *Would you like to be more informed about the conditions under which animals are farmed in (OUR COUNTRY)?*

– The majority of citizens wish to be better informed –

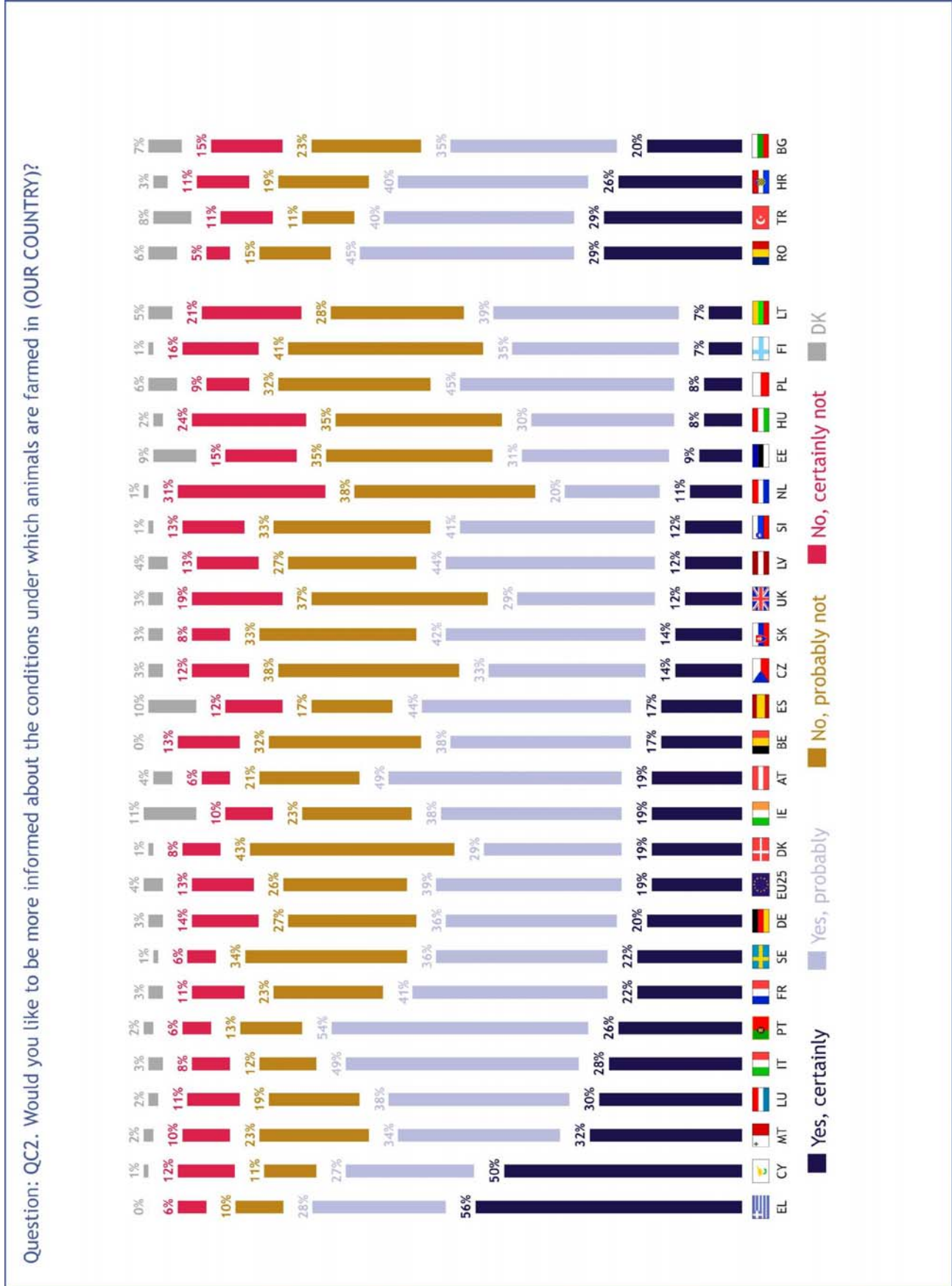


A majority of just under six out of every 10 (58%) EU citizens say they would like to receive more information about farming conditions in their country, with 39% saying they would ‘probably’ and 19% saying they would ‘definitely’ like this.

This fits in with the pattern of results we have already seen, namely that the public regards this as an important issue and that while most possess at least some familiarity with conditions, this knowledge is not particularly wide in its extent.

At a general level, the desire to be more informed is lower in the new Member States, with exactly half as many saying they would ‘certainly’ like more information (10%) than in the older EU15 states (20%). This may in part be due to the slightly higher importance given to the subject by citizens of the EU15 - as described in the first chapter, citizens here rate the subject 7.8 out of 10 on importance, compared to 7.5 for those in the new Member States.

This desire to be more informed is particularly strong in many of the Mediterranean states, with 85% of surveyed Greeks, for example, saying they would probably or definitely like more information. Over three-quarters of the population also expressed this desire in Portugal (79%), Italy (77%) and Cyprus (76%). Romania (74%) and Turkey (70%) also show strong receptivity.



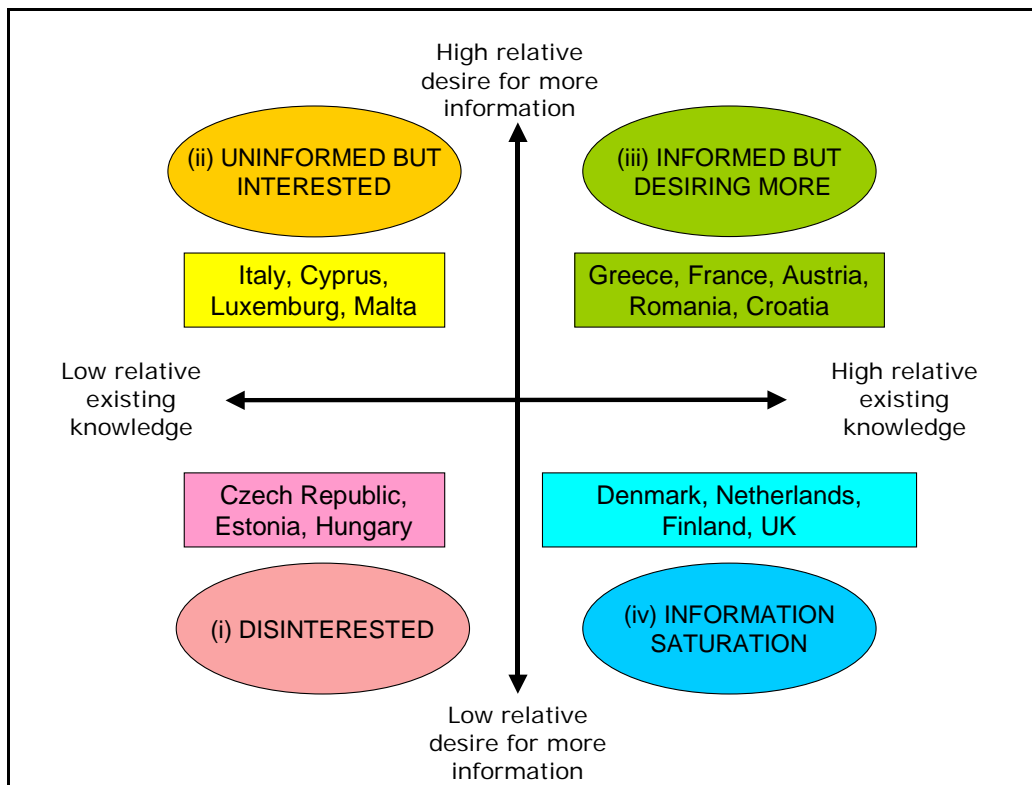
By contrast, there are a number of countries where the majority would be less likely to consume further information on this issue. This group is headed by the Netherlands, where 69% say that they would probably or certainly not like to be more informed, and Hungary (60%).

In the case of certain individual countries, these results look to be linked to how familiar respondents are with farming conditions. We have seen that respondents in many of the Mediterranean countries show a strong wish to be more informed. Some of these countries were also shown, in a previous survey, to have considerably higher than average proportions of citizens who had never visited a farm. For example, 66% of Greeks and 50% of Cypriots said that this was the case, compared to an EU average of 31%¹⁰.

We now examine this link between existing knowledge and the desire to be more informed in greater detail.

– The state of opinion in most countries can be described as ‘informed but desiring more’ –

Analysing results to this question alongside those we have already seen on the current extent of knowledge on animal welfare conditions enables us to further understand differing states of opinion across Europe. The two sets of results enable us to establish an information typology based on the degree of existing knowledge and the desire for further information.



¹⁰ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), p.4

This chart is based on a country's results for both dimensions, *relative to the EU average*. It therefore describes variations from the norm, rather than the exact situation in the countries mentioned¹¹.

The first category is that of **'disinterested'** countries, characterised by a relatively low level of existing knowledge of welfare conditions and a relatively low desire for further information. Countries which fall into this category are the Czech Republic, Estonia and Hungary.

Other countries show a similar relatively low score on self-perceived knowledge, but differ from the first category in that they show an above-average desire to accumulate future knowledge. They can therefore be classified as **'uninformed but interested'**. This group comprises of Italy, Cyprus, Luxemburg and Malta

The third category, **'informed but desiring more'**, could be used to explain the general picture in the EU as a whole. At a Union-wide level around seven out of every ten are to a greater or lesser degree familiar with current conditions, and six out of every ten desire to be more informed. Individual countries which exhibit both these opinions at above average levels are Greece, France, Austria, Romania and Croatia.

Finally, there are a handful of countries which form a distinct grouping characterised by **'information saturation'**. In these countries existing knowledge is higher than average, but respondents are less receptive to being given further information. This situation is best represented by the Netherlands, where 84% are familiar to some extent with conditions, but less than one third (30%) would like further information. Other countries which exhibit this tendency are Finland, Denmark and the United Kingdom.

The remaining countries either exhibit results that are close to the EU average, or differ from this on one dimension only.

– Demographic factors are relatively unimportant in the desire for more information; much more relevant are views on the importance of the subject and current farming conditions –

Some social and demographic influences are evident in responses to this question, although it should be stressed that these are very slight. We see that those in the **25-54 age range are marginally more likely to want more information** than the older and younger age groups, and that those with **more than two persons in their household are slightly more receptive** to further information than single persons. A possible explanation for these patterns is that those responsible for the preparation of meals for dependent children are slightly more concerned about the sourcing of food than those who are primarily only responsible for themselves.

¹¹For a country to be classed as 'high' or 'low' on each of the two dimensions, the difference from the EU average score must be at least 5 percentage points. The chart therefore only shows countries where opinion differs from the average on both current level of knowledge and the desire for future information. For exact details of results for each country, please refer to the country tables for QC1 and QC2, included in the annexes.

Desire for more information: Analysis by demographics and other opinions

Would you like to be more informed about the conditions under which animals are farmed in (OUR COUNTRY)?

[Yes = 'yes, certainly' + 'yes, probably'; No = No, probably not + 'No, certainly not']

	Yes	No	DK
EU25	58%	39%	4%
Age			
15-24	55%	41%	3%
25-39	59%	38%	3%
40-54	60%	36%	4%
55 +	56%	41%	4%
Household composition			
1	54%	42%	4%
2	57%	39%	4%
3	59%	38%	3%
4+	59%	37%	4%
Respondent occupation scale			
Self- employed	62%	35%	3%
Managers	53%	44%	3%
Other white collars	60%	37%	3%
Manual workers	61%	36%	3%
House persons	62%	32%	6%
Unemployed	56%	40%	3%
Retired	54%	43%	3%
Students	56%	40%	4%
Farming conditions knowledge			
A lot	63%	36%	1%
A little	65%	34%	2%
None	44%	50%	6%
Animal welfare importance			
1-3	27%	69%	4%
4-7	48%	48%	4%
8-10	68%	30%	2%
Need to improve welfare			
Yes	66%	32%	2%
No	32%	66%	2%

There is a degree of variation depending upon respondents' occupation. For example, the self-employed are most likely to desire more information (62%) yet managers, who often tend to exhibit similar opinions, are in this case less likely to say they wish to be better informed (53%).

As would be naturally expected, the **desire to be better informed is particularly linked to the importance people attach to the subject**. Those rating the subject at the high end (8,9, or 10) of the importance scale are over twice as likely to say they wish to be more informed than those at the low end (1,2 or 3) of the scale.

Respondents who believe national conditions need to be improved are also substantially more likely to wish for greater information. Exactly two-thirds (66%) of those demonstrating the opinion that conditions need to be improved also say they wish to be better informed. By contrast, less than one-third (32%) of those who are satisfied with conditions as they currently stand want to improve their knowledge.

Finally, we see that **those with some existing knowledge of conditions in their own country are more likely to wish for further information**. There is a difference of more than 20 percentage points in those expressing the desire for more information between respondents saying they have 'a little' knowledge (65%) and those saying they have no knowledge (44%).

Interestingly, the degree of current knowledge has little influence over the extent to which respondents wish to improve their understanding: 63% of those who already possess 'a lot' of knowledge wish to be better informed, compared to 65% of those who know 'a little'.

In essence, the need for further information is not driven by a feeling amongst the public of being under-informed. Instead public receptivity towards greater information is more a result of the importance attached to the subject, which is related to a view that conditions need to be improved.

2.3 Sources of information on animal welfare

QC3. If you were looking for information about the conditions under which animals are farmed in (our country), which of the following sources would you use? Which else?

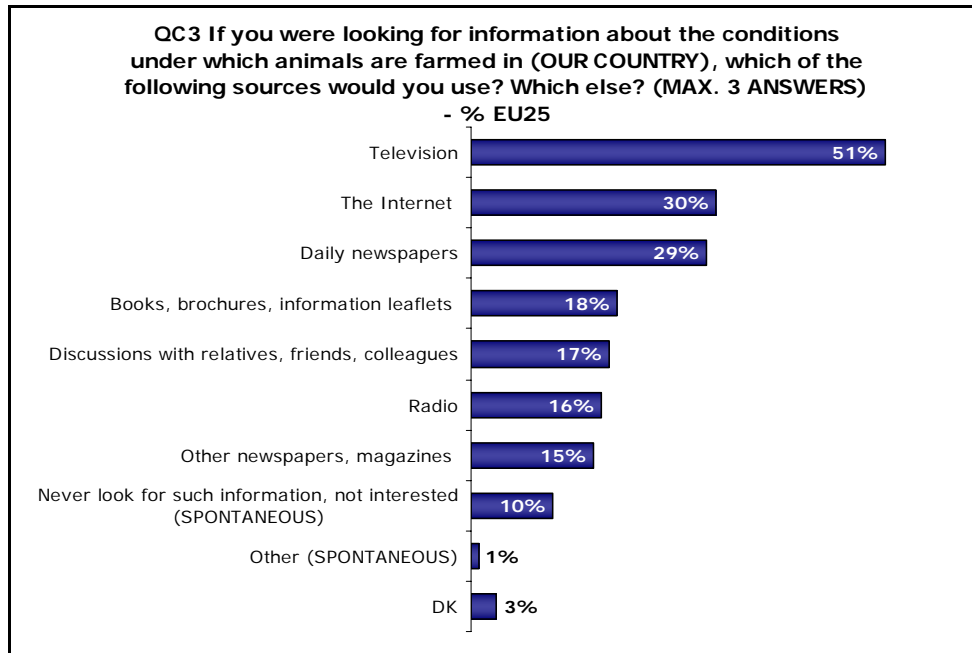
We have seen that the European public, by and large, would like to be better informed about the conditions in which farmed animals are kept in their own countries.

Meeting this demand is a complex matter. As the analysis below shows, there is a general preference for television as a source of information, although this varies considerably according to the countries and sectors of the population involved.

– Television a preferred source of information, with the internet and daily newspapers also used –

Respondents were asked to choose up to three sources that they would use, were they to be looking for information about animal welfare conditions in their country.

The top source, by a considerable margin, is **television (mentioned by 51% of respondents)**. This is followed by the internet (30%) and daily newspapers (29%).



The high proportion of those mentioning television reflects the fact that previous surveys have shown the public has a preference for this as a source of information. For example, the Spring 2005 Eurobarometer found that 70% use the television as a source when looking for information on the European Union, its policies and institutions¹².

Information use also varies depending on national contexts, no doubt reflecting different patterns of media use across the continent. At a general level, those in the 10 new Member States are more likely than average to say they would use television (59% vs. 51% EU average) and less likely to use the internet (23% vs. 30%) and daily newspapers (25% vs. 29%).

More specifically, there are a number of cases where respondents in a particular country give answers that differ radically from the norm:

- The trend of a preference for television is particularly high in Portugal (72%), Romania (66%), Poland, Cyprus (both 64%), Bulgaria and Turkey (both 63%).
- The Danish public are almost twice as likely as the EU public as a whole to use the internet to find out information about animal welfare (59%). Other countries where this medium is particularly preferred are the Netherlands (57%), the United Kingdom (48%) and Sweden (44%). This is most likely linked to high internet penetration rates in these countries¹³.
- Daily newspapers are especially preferred in Austria (49%) Germany (44%) and Sweden (43%).

¹² Eurobarometer 63 (September 2005), p.80.

http://ec.europa.eu/public_opinion/archives/eb/eb63/eb63_en.pdf

¹³ See here, *E-communications household survey, Special Eurobarometer 249* (July 2006), p.41.

- Respondents in Spain and Estonia were more dismissive than elsewhere of information on this subject. 18% of Spaniards and 17% of Estonians said that they would never look for information on this subject, or that they were not interested, even though this response was not given to them as a pre-designated option but was foreseen as a possible spontaneous response.

– Television is especially preferred by those seeking more information –

It is particularly important to examine possible information sources amongst those who say they would like to be more informed about welfare conditions, as **this group forms the most likely audience for any communications on the matter**. Here the key finding is that those desiring more information show a **higher than average preference for information via television (62% vs. 51% average)**. They are also more receptive to being given information via daily newspapers (35% vs. 29% average) and radio (21% vs. 16% average). On the matter of internet use, those who desire more information show slightly less inclination to use the internet, with 29% saying they would be likely to use this source, compared to 32% of all surveyed.

These results suggest that to meet the demand for more information, a particular application of resources to television would be most effective, perhaps supplemented by use of daily newspapers, particularly in those countries where their use is high.

– The internet rivals television as a major information source amongst the young and the educated –

Patterns of information use vary considerably according to demographic factors, and in particular age and education. **For the youngest age group, 15-24 year olds, the internet (51%) replaces television (47%) as the most frequently cited source**. As age increases, use of the internet decreases, with barely one in ten (11%) of those in the 55+ age group saying they would use the internet for information on animal welfare.

In turn, other sources come to assume more importance amongst the older age groups with daily newspapers mentioned by over one-third (34%) of 55+ respondents, compared to only one-fifth (20%) of those aged between 15 and 24.

Sources of information: Analysis by demographics and other opinions

QC3. If you were looking for information about the conditions under which animals are farmed in (our country), which of the following sources would you use? Which else?

[% mentioning source amongst subgroup]

	Television	Radio	Daily newspapers	The Internet
EU25	51%	16%	29%	30%
Age				
15-24	47%	11%	20%	51%
25-39	48%	14%	27%	41%
40-54	52%	17%	31%	32%
55 +	56%	20%	34%	11%
Education (End of)				
15	58%	18%	31%	9%
16-19	53%	18%	30%	28%
20+	44%	14%	29%	44%
Still Studying	46%	10%	22%	56%
Desire to be more informed				
Yes	62%	21%	35%	29%
No	37%	10%	22%	32%

With regard to education levels, we find that **those educated to higher levels are also much more likely to use the internet**. Just under half (44%) of those studying until the age of 20 and beyond cited the internet as a possible source, a figure almost five times as high as that for those who ended their education at 15 (9%). Conversely those in the latter group are more likely to use television (58%), although it must be noted that here differences are not as marked as with internet use: 44% of those studying up to and beyond the age of 20 also say they would use television.

3. Perceptions of animal welfare

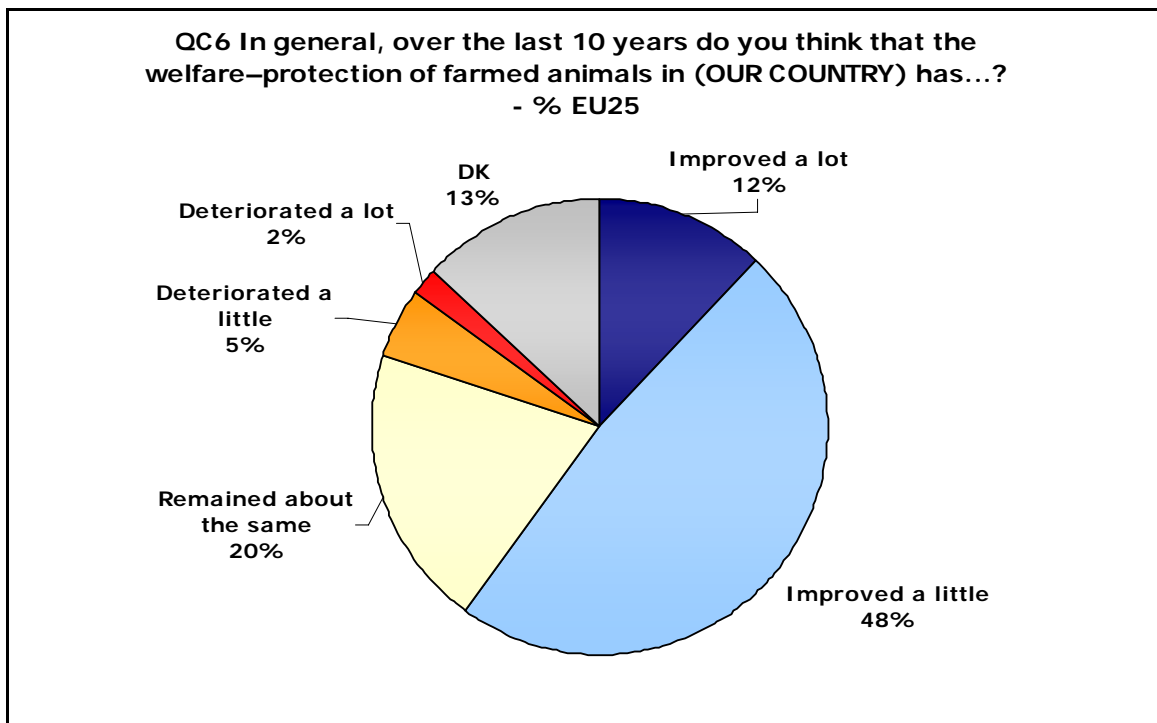
We have seen that animal welfare is an important issue in the mind of the average EU citizen, and that there exists a demand for more knowledge in the area. It was noted that both of these facts are linked to perceptions of the current state of animal welfare in respondents' countries. This issue is examined in greater detail here.

3.1 Improvements over last 10 years

QC6. In general, over the last 10 years do you think that the welfare-protection of farmed animals in (our country) has...improved a lot/improved a little, etc.

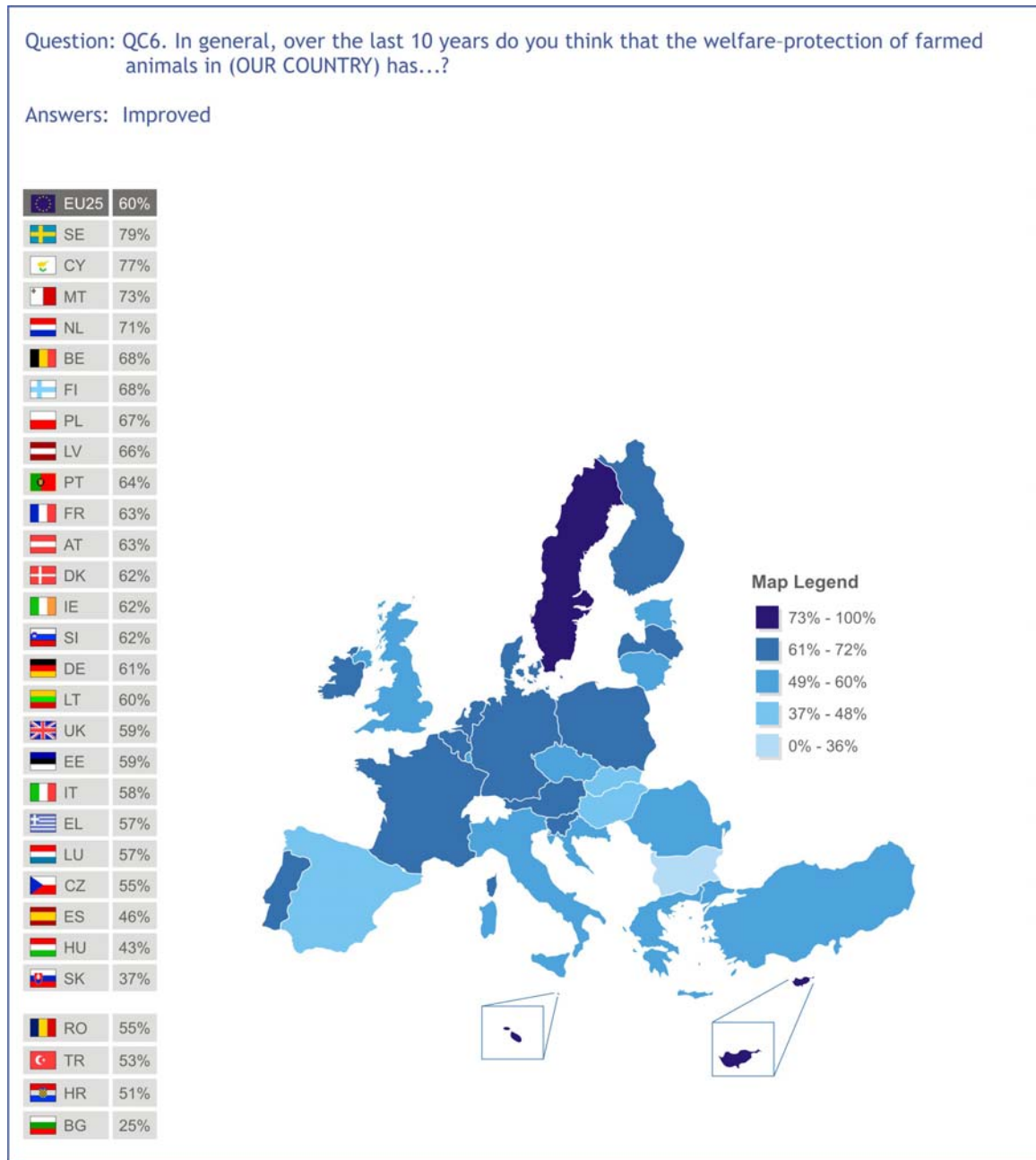
– Most believe that animal welfare has improved in their country over the last decade –

Six in ten (60%) respondents believe that welfare-protection has improved in their country over the last ten years. However, they do not believe this has happened to a great extent, with **just under half (48%) of respondents believing that conditions in their country have 'improved a little'**, and only a further 12% saying conditions have 'improved a lot'.



Encouragingly, less than one in ten (7%) think that conditions have deteriorated to any extent, although one in five (20%) believe that conditions have remained the same.

Countries where improvements are especially perceived are Sweden (79% a lot or a little), Cyprus (77%), Malta (73%) and the Netherlands (71%).



The view that conditions are worsening forms a minority opinion in all countries surveyed. In many cases, this opinion barely registers, for example only being expressed by 2% of Irish respondents. Two countries that differ slightly are Bulgaria, where exactly one in five believe that conditions have worsened and Hungary (19%).

Opinion in Slovakia differs in the sense that the most common response is that conditions have stayed the same (37%). This opinion is also given by a higher than average proportion in Bulgaria (29%) and Greece (27%).

Lastly we see three countries where non-response rates are high – 28% of Spaniards, 27% of Bulgarians and 25% of Irish were unable to give an opinion here. In the case of Spain this is most probably linked to the low importance given to the

subject and a lack of awareness of farming conditions. Considering that a previous survey found that almost half of all Spaniards (48%) have not visited a farm which rears animals¹⁴, it is not surprising that some respondents experienced difficulties in making an evaluation of welfare-protection standards.

In Bulgaria a similar lack of awareness combines with an unusually critical mindset amongst the population to create a unique set of circumstances. Here only a quarter of the population believe that conditions have improved over the last ten years, with the remainder distributed roughly evenly amongst 'remained the same', 'deteriorated' and 'don't know' responses.

– Demographics are of slight influence, but positive opinions are largely linked to knowledge –

There is no particular segment of the population that stands out as especially critical of national conditions. Women (58%), respondents aged 15-24 (55%) and the least educated (56%) are slightly less likely than average (60%) to say that conditions have improved. Urbanisation is also a factor with those living in a rural village (64%) more likely to perceive an improvement than those residing in a large town (56%). However, it should be stressed above all that however the population is divided, the most dominant opinion is that welfare conditions have shown a slight improvement.

Opinion on changes in welfare protection: Analysis by demographics and other opinions

In general, over the last 10 years do you think that the welfare-protection of farmed animals in (our country) has...improved a lot/improved a little, etc.

[Improved = 'Improved a lot' + 'Improved a little'; Deteriorated = 'Deteriorated a lot' + 'Deteriorated a little']

	Improved	Deteriorated	DK
EU25	60%	7%	13%
Sex			
Male	62%	7%	12%
Female	58%	8%	14%
Age			
15-24	55%	8%	15%
25-39	60%	8%	14%
40-54	63%	7%	11%
55 +	59%	8%	13%
Farming conditions knowledge			
A lot	72%	8%	2%
A little	66%	7%	7%
None	44%	8%	27%

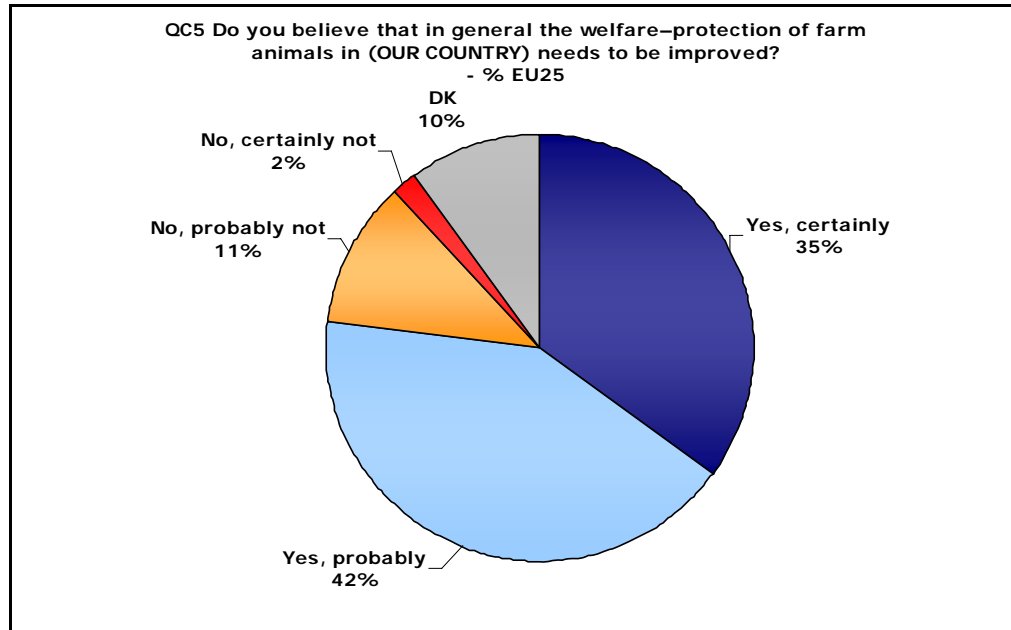
Knowledge of farming conditions is key in forming opinion here, with those claiming to have a lot of knowledge more likely to say conditions have improved (72%) than those saying they have a little knowledge (66%) and especially those who have no knowledge of farming conditions (44%). This is a particularly interesting result, **indicating that the belief in the existence of improvements over time is based on a real understanding of farming conditions.**

¹⁴ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), p.4.

3.2 Further improvements

QC5. Do you believe that in general the welfare–protection of farm animals in (our country) needs to be improved?

- **Conditions may be progressing, but the public still believe improvements are necessary** –



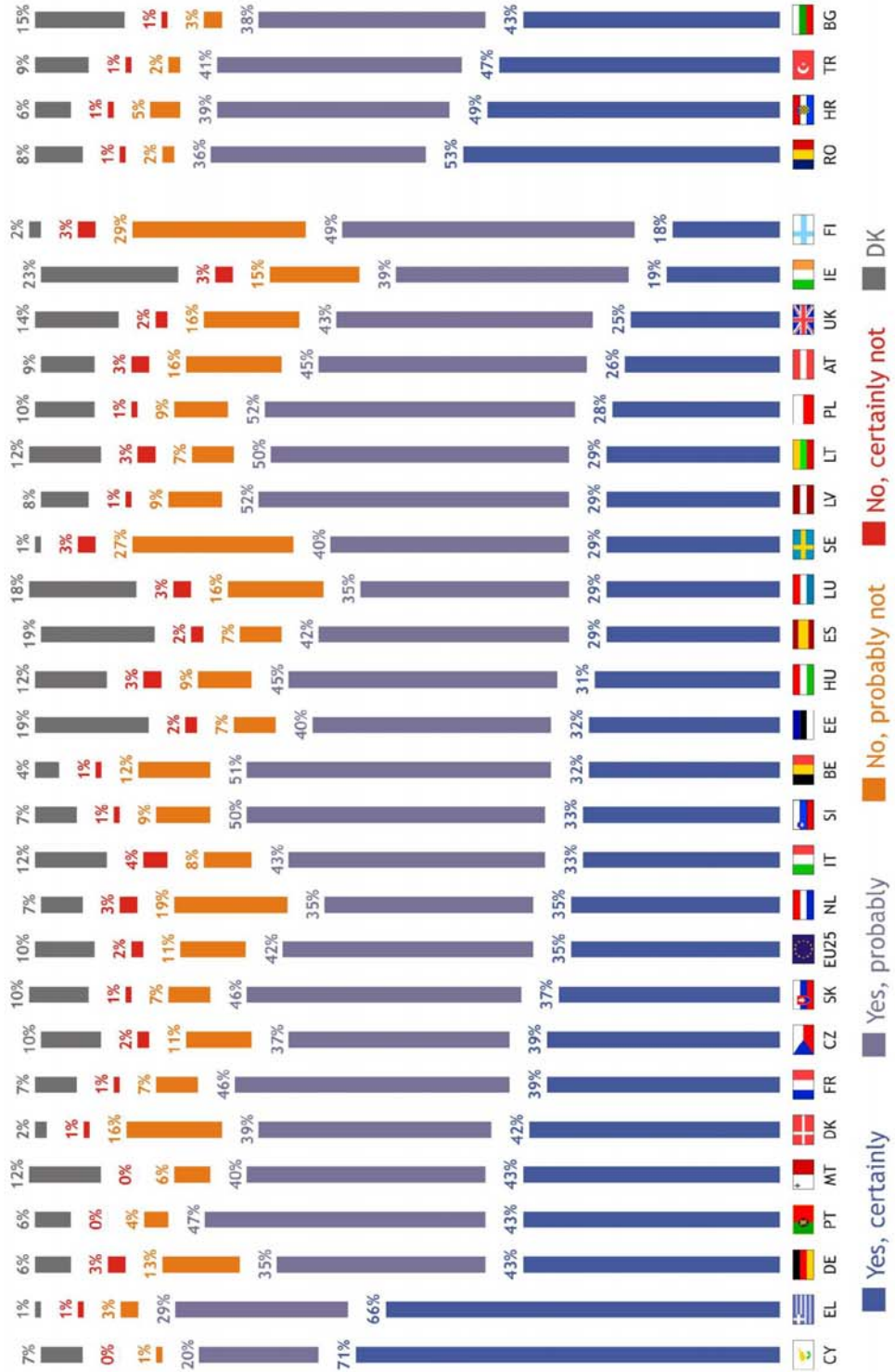
When asked about welfare protection in the future, **the vast majority of Europeans believe that there is a need for further improvements to be made in their country**. Almost 8 out of 10 respondents (77%) expressed this opinion, with 35% saying improvements are 'certainly' needed, and a further 42% answering that they are 'probably needed'. Only 13% do not think improvements are necessary.

These results are given further weight when it is noted that, in the previous major survey on this topic, 55% of respondents said that their country's food and agriculture policy does not give sufficient importance to animal welfare and protection. This compares to 29% who said that this importance level was about right and 7% who said it was too high, and provides a further indication that the EU public wishes to see standards improve¹⁵.

An overwhelming 96% of Greeks believe welfare should be improved in their country. Over 9 out of 10 Cypriots (91%) and exactly this proportion of Portuguese (90%) have the same view.

¹⁵ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), p.64.

Question: QC5. Do you believe that in general the welfare-protection of farm animals in (OUR COUNTRY) needs to be improved?



In Finland and Sweden the situation is very different. These countries resemble Cyprus with regard to perceived improvements over the last decade. However, on the matter of future improvements, they differ, with this figure falling to around two-thirds. 67% of Finns and 68% of Swedes say national conditions should be improved. Significantly higher percentages of 31% and 30% respectively see no need for improvement. In these two countries, these results suggest a greater degree of confidence that animals are already well protected in these countries.

Elsewhere, lower than average results can be interpreted differently. In Ireland, 58% say they see a need for conditions to be improved. With almost a quarter (23%) unable to respond to the question this result may be more indicative of a lack of opinion rather than a higher than average confidence in current conditions.

– Views on future improvements are largely determined by the importance of the subject, and existing knowledge –

As these varying results by country suggest, opinion on the need for future improvements is determined by a range of factors. More specifically, these are:

- The belief that animal welfare is an important subject. Of those who rate animal welfare as 8,9 or 10 out of 10 on importance, 87% also say that improvements need to be made in their country. This compares to only 44% of those rating importance as 1,2 or 3 also saying there is a need for future improvements.
- Knowledge of farming conditions. Over one in five (22%) of those with no knowledge of conditions are unable to offer an opinion on future developments. This falls to 5% of those with a little knowledge, and just 1% of those with a lot of knowledge.

Perceived need to improve welfare: Analysis by other opinions

Do you believe that in general the welfare–protection of farm animals in (our country) needs to be improved?

[Yes = 'Yes, certainly' + 'Yes, probably'; No = 'No probably not' + 'No, certainly not']

	Yes	No	DK
EU25	77%	13%	10%
Farming conditions knowledge			
A lot	80%	19%	1%
A little	83%	12%	5%
None	65%	13%	22%
Desire to be more informed			
Yes	88%	7%	5%
No	63%	22%	14%
Animal welfare importance			
1-3	44%	29%	26%
4-7	68%	20%	13%
8-10	87%	9%	4%

In terms of socio-demographics, we see little evidence of any particular groups being disposed towards certain opinions on future developments.

3.3. Stakeholders best-placed to ensure animal welfare

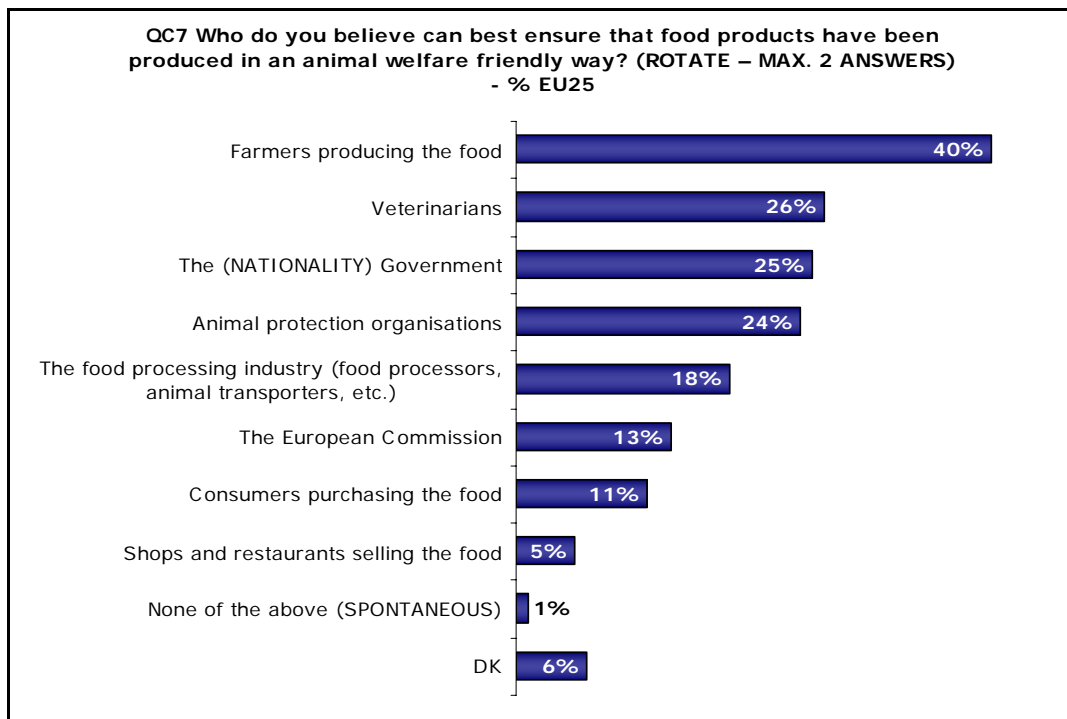
QC7. Who do you believe can best ensure that food products have been produced in an animal welfare-friendly way?

Public opinion is generally of the view that whilst animal welfare conditions are improving, further measures still need to be taken.

Respondents were also asked who they believed was best placed to ensure food products were produced in a welfare-friendly way. Answers to this question are strongly indicative of who the public believes should be responsible for future improvements.

– Farmers to take responsibility themselves for animal-friendly production –

Primarily, it seems that this responsibility is seen as lying with farmers themselves. This was the most frequently selected option, being chosen by 40%. Three other stakeholders are also seen as having an important role to play, being mentioned by around a quarter of all surveyed. These are veterinarians (26%), national governments¹⁶ (25%) and animal protection organisations (24%). The users of animal products, whether that be the food processing industry (18%), or consumers themselves (11%) are seen as being less well-placed to ensure animal welfare.



¹⁶ On the matter of government policy in this area, see further *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), pp.64-67. Here 55% stated that their national government gives insufficient weight to animal welfare and protection in the agricultural policies of their countries.

Overall it could be said that the **European public therefore envisions a situation where farmers are mainly responsible for their own livestock, assisted by veterinary professionals, and regulated by national governments who are in turn pressured by civil society.**

This varies slightly in the new Member States, with farmers seen as even more influential (53%), whilst national governments are seen as less equipped for taking action here (18%).

It should also be noted that **the European Commission is not mentioned by very many respondents**, with only 15% saying the Commission is well placed to ensure food products are produced in a welfare-friendly way.

However, the primacy given to producers could be seen as an indirect vindication of recent reforms made to the Common Agricultural Policy, where direct payments are partly dependent upon compliance with animal welfare standards. This 'cross-compliance' mechanism thereby creates a means of making farmers more accountable¹⁷.

Farmers and veterinarians may be seen as those stakeholders who come into regular close contact with animals and so are in the ideal situation to effect changes at the level of the animal. At the level of individual countries we see a differing opinion in Spain, where only 23% say that farmers are best placed to ensure welfare. Instead considerably more Spaniards than average believe initiatives should be government-led (41%). This could be linked to the fact that around half of the Spanish population has never visited a farm, perhaps leading to less familiarity with measures producers can take to ensure welfare¹⁸.

Cypriots also strongly believe their government (46%) has an important role although here it is also the case that farmers (40%) are still seen as being best placed to ensure animal welfare.

In France, veterinarians (49%) are accorded a greater role by the public than farmers (41%). Veterinarians also take on higher than average levels of importance in Luxembourg, being mentioned by exactly four out of ten respondents here.

Finally, the food processing industry, though seen as relatively unimportant elsewhere, is seen as having a significant role in Slovakia (36%) and Finland (35%).

¹⁷ See on this issue: *Cross-Compliance Infosheet*.
http://ec.europa.eu/agriculture/capreform/infosheets/crocom_en.pdf

¹⁸ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), p.4.

– Knowledge of farming conditions leads to higher importance given to producers –

As with the general need for further improvements, it seems variations in more specific views on responsibility are linked to the key factors of knowledge and perceived importance of the subject:

- Farmers are, naturally, seen as more important by those with the highest levels of knowledge of farming conditions (47%) than those with the lowest (33%).
- The role of animal protection organisations is particularly dependent on the perceived importance of the subject: 28% of those rating animal welfare as being of high importance also mentioned animal protection organisations at this later question, compared to only 13% of those rating the subject as low in importance.

Demographically, there are again few factors which seem to greatly impact on opinion. Two exceptions are:

- Farmers are given greater importance amongst respondents in rural villages (44%) than those in large towns (37%).
- Though still seen as relatively unimportant, the European Commission's potential role is recognised more amongst higher educated respondents. The European Commission was mentioned by only 9% of those ending their studies at 15, but by 17% of those continuing until the age of 20 and older.

4. The supply-side: producers

The introduction of more rigorous standards, in farming as in any other market, has the potential to involve greater costs for the producer. Here we examine two aspects of the impact of welfare standards on competitiveness: the issue of whether farmers should be compensated for higher costs, and the question of standards outside of the EU.

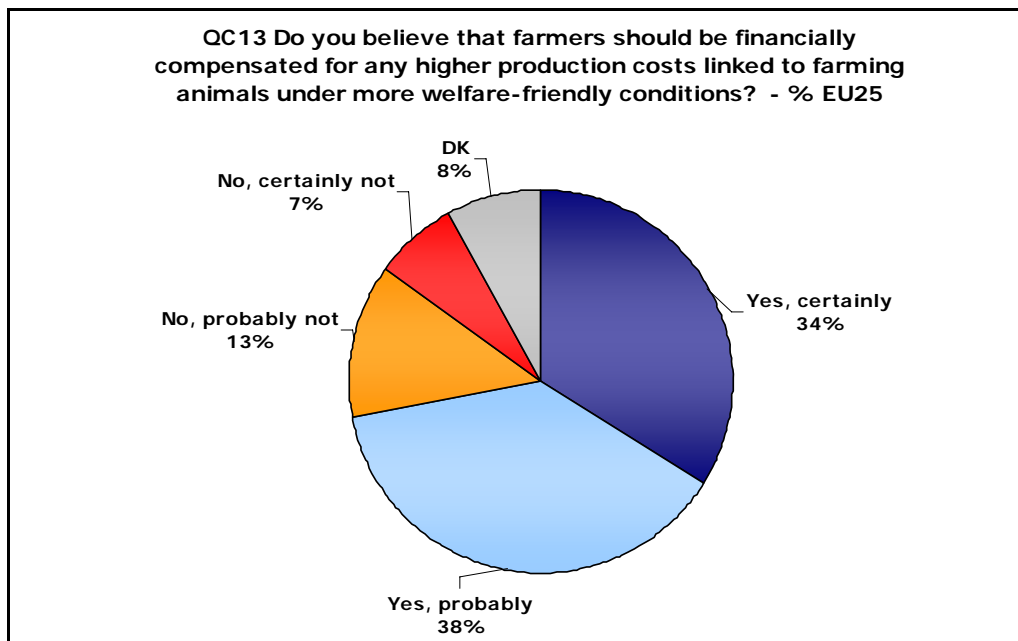
4.1 Should farmers be compensated?

QC13. Do you believe that farmers should be financially compensated for any higher production costs linked to farming animals under more welfare-friendly conditions?

A survey conducted at the end of 2004 found that the public believed that the top priority for the EU, in terms of its agricultural policy, should be to ensure a stable income for farmers¹⁹. This belief is further evidenced by the firm support the EU public gives to the idea of compensating farmers for high production costs that may arise from improving animal welfare conditions.

– Strong endorsement of the idea of compensation –

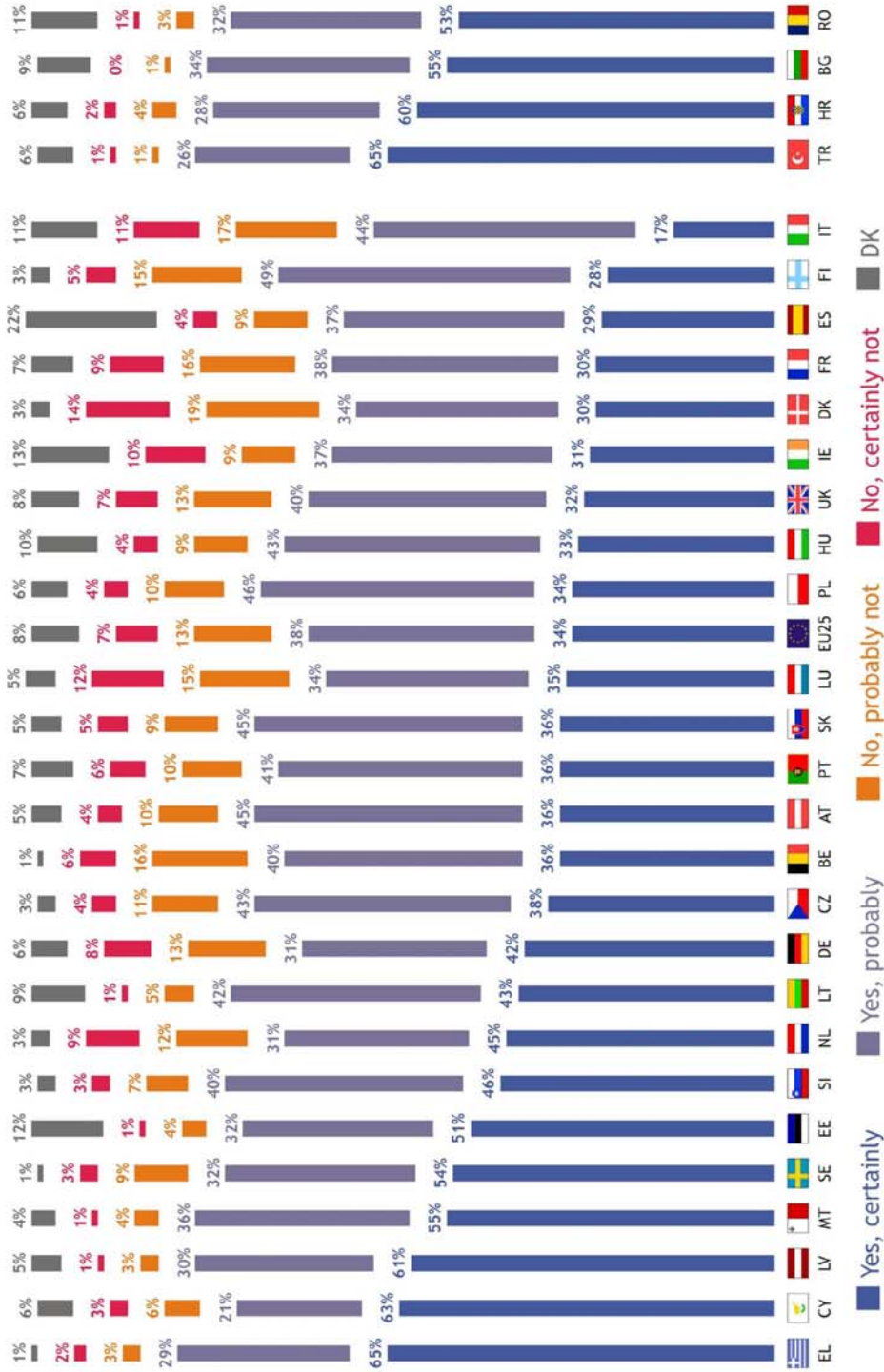
A large majority (72%) of the EU public believes that farmers should be remunerated for the higher costs that can result from greater welfare standards. **Just over one third (34%) say they 'certainly' agree with this idea**, and a further 38% say they are 'probably' favourable to the concept.



This principle is particularly well endorsed amongst Greek (94%), Turkish (92%), Latvian and Maltese (both 91%) respondents.

¹⁹ *Europeans and the Common Agricultural Policy*, Special Eurobarometer 221 (February 2005), p.11.

Question: QC13. Do you believe that farmers should be financially compensated for any higher production costs linked to farming animals under more welfare-friendly conditions?



In Western European and Scandinavian countries the idea is still more accepted than rejected, but we see a higher than average proportion of negative responses. For example, 33% of Danes, 28% of Italians and 25% of French respondents compared to an EU average of 19% oppose such financial compensation. It is interesting to note in this context that Danes were in 2004 the least likely nationality to say that ensuring an adequate income for farmers should be the main focus of EU agricultural policy²⁰.

These results may also possibly be due to the particular concentration of livestock farming in these countries with France and Denmark both specialising in cattle and pig farming, and Italy also an important centre for pig meat production²¹. Because of this, some respondents in these countries may be more inclined to take the view that farmers already receive sufficient financial support. Notably this survey did not investigate attitudes as to the potential sources of any such financial compensation to secure more welfare-friendly farming conditions.

Knowledge of farming conditions and the importance accorded to animal welfare by the respondent are once again important factors related to opinion, with those scoring high on both dimensions more likely than average to condone compensatory payments.

Compensation for farmers: Analysis by other opinions

Do you believe that farmers should be financially compensated for any higher production costs linked to farming animals under more welfare-friendly conditions?

[Yes = 'Yes, certainly' + 'Yes, probably'; No = 'No probably not' + 'No, certainly not']

	Yes	No	DK
EU25	72%	19%	8%
Farming conditions knowledge			
A lot	81%	17%	2%
A little	76%	19%	5%
None	63%	21%	15%
Animal welfare importance			
1-3	58%	30%	12%
4-7	67%	24%	9%
8-10	78%	17%	5%
Need to improve welfare			
Yes	77%	17%	6%
No	63%	32%	5%

In addition, as would logically be expected, the view that farmers should be compensated is related to a perceived need to improve welfare standards: 77% of those who believe this need exists also approve of compensatory payments, compared to 63% who see no need for welfare improvements.

However, the fact that the majority of those who think improvements are not necessary still agree with the compensation principle is a highly significant finding.

Once more, social and demographic factors are of relatively low importance.

²⁰ *Europeans and the Common Agricultural Policy*, Special Eurobarometer 221 (February 2005), p.12.

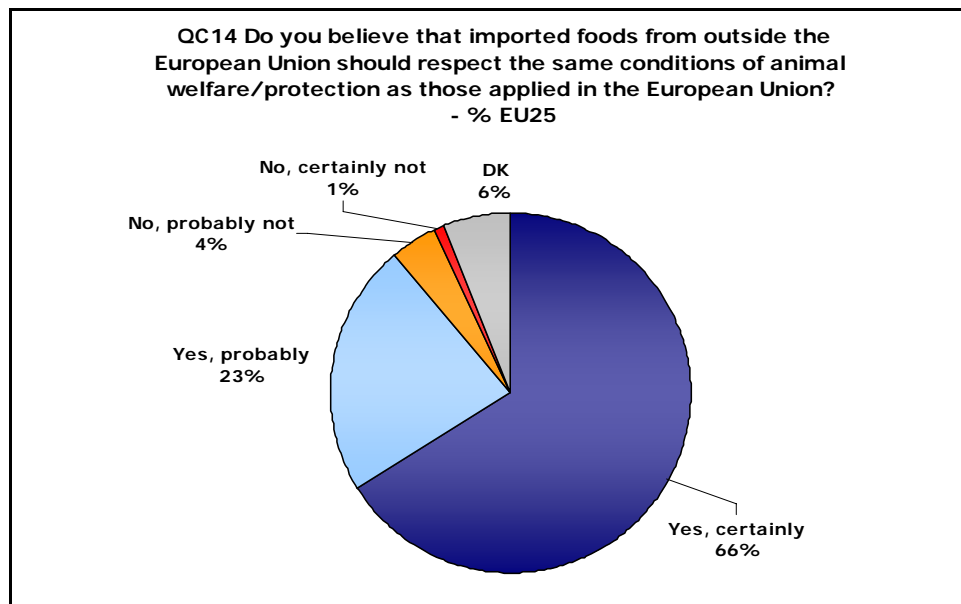
²¹ *Prospects for agricultural markets and income in the EU, 2006-2013*. Directorate-General for Agriculture, July 2006. <http://ec.europa.eu/agriculture/publi/caprep/prospects2006/fullrep.pdf>

4.2 Standards outside of the EU

QC14. Do you believe that imported foods from outside the EU should respect the same conditions of animal welfare-protection as those applied in the EU?

In a previous survey, 45% of EU respondents said that they believed animal welfare and protection was better in the EU than elsewhere in the world, compared to just 8% who held the opposite view, and 34% who thought that it is about the same within the EU than in other parts of the world²². The current survey examines this issue further, and shows that the public believe this disparity should be reduced.

– Almost universal agreement that standards should be the same for products imported from outside the EU



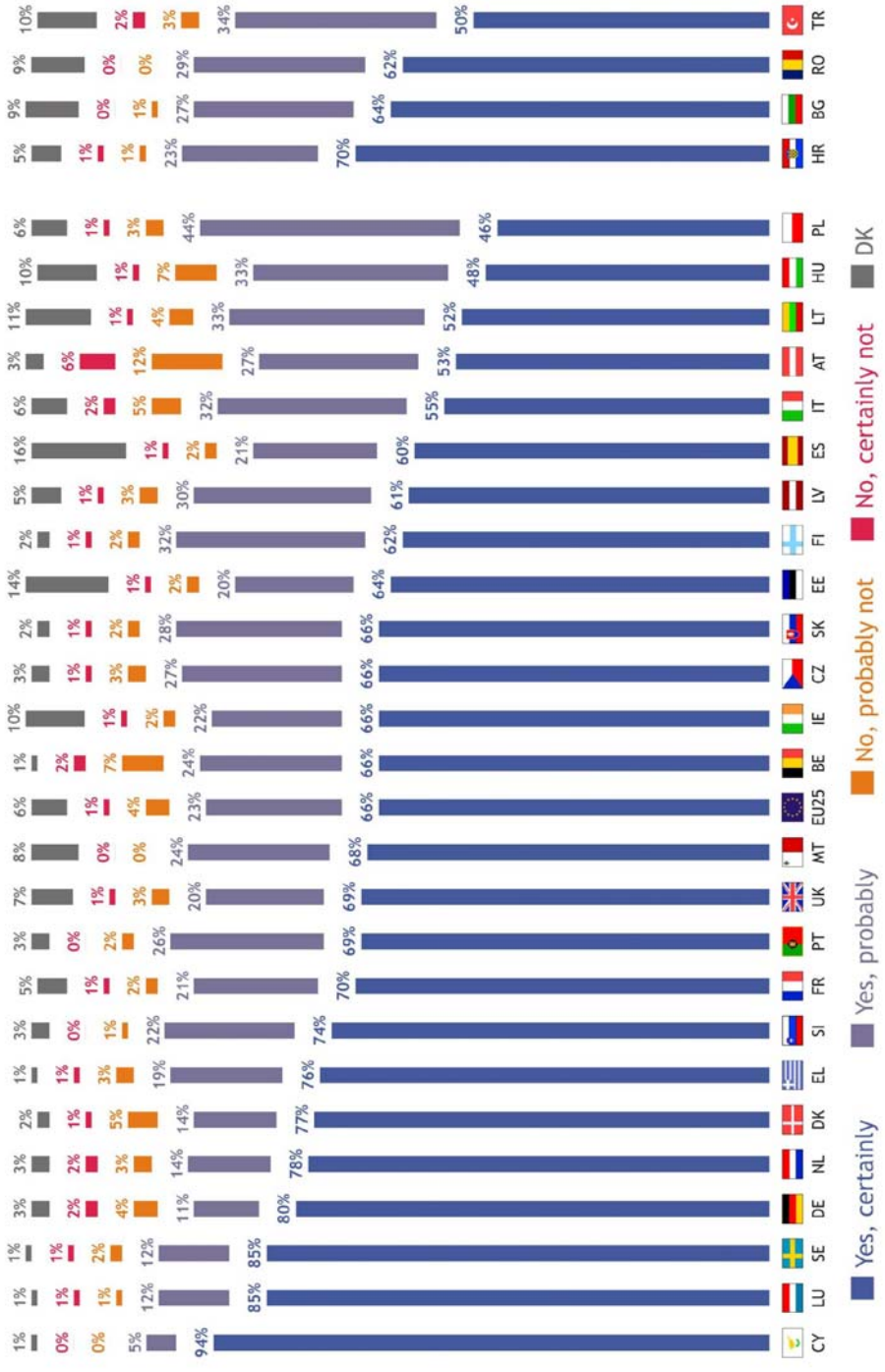
Just under 9 out of every 10 (89%) EU citizens believe that similar animal welfare standards should be applied to food products imported from outside of the EU. Furthermore, this is a strongly held view with precisely two-thirds saying that they 'certainly' agree with the idea. Even in the country where this belief is least widespread – Austria – almost 8 out of 10 (79%) still expressed this opinion.

This strength of opinion is indicative firstly of the importance attached to animal welfare as a subject in its own right – this has been demonstrated in the first section of this report.

Secondly, it may also reflect an economic as well as an ethical component: The introduction of higher animal welfare standards can also involve wider consequences for the competitiveness of EU countries in the global farming market. Lower standards and costs (whether related to animal welfare or not) elsewhere can mean that producers in Third countries are often able to undercut in price those producers within the EU.

²² *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229 (June 2005), p.8.

Question: QC14. Do you believe that imported foods from outside the European Union should respect the same conditions of animal welfare protection as those applied in the European Union?



Standards outside of the EU: Analysis by other opinions

Do you believe that imported foods from outside the EU should respect the same conditions of animal welfare-protection as those applied in the EU?

	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK
EU25	66%	23%	4%	1%	6%
Farming conditions knowledge					
A lot	77%	18%	3%	1%	1%
A little	68%	24%	3%	1%	3%
None	59%	24%	4%	2%	11%
Animal welfare importance					
1-3	46%	31%	7%	4%	11%
4-7	56%	31%	6%	2%	6%
8-10	75%	18%	2%	1%	3%
Need to improve welfare					
Yes	70%	23%	3%	1%	3%
No	58%	24%	10%	4%	5%

Respondents with high levels of knowledge (total yes: 94%), the belief that standards need to be improved in their own country (93%), and the belief that welfare is important (94%) are all extremely likely to argue for a level playing field in standards. However this view is still dominant even amongst those who see the subject as being of little importance (78%).

It seems therefore that whatever one's opinions on animal welfare in general, the idea of unequal standards between the EU and Third countries leads to the reaction that EU producers should not be disadvantaged by unfair competition. There is no one demographic sector which shows this opinion to a significantly lower than average degree. Clearly, this is an opinion which is almost universally held.

5. The demand-side: consumers

We have seen that the European public largely accords responsibility for animal welfare standards to farmers rather than to themselves as consumers. However, we also have evidence from a 2005 poll that the public has confidence in their own ability to influence standards through their purchasing behaviour. In this survey, almost three-quarters of respondents said that they believed that buying animal-friendly products could have a positive impact on the protection of farmed animals²³.

This section examines in more detail the reasons why consumers may shop with animal welfare in mind, their willingness to change their habits for this reason, and the extent to which they feel they are provided with the information required to make this choice.

5.1 Motivations to purchase animal-friendly products

QC15. From the following list, what would be for you the main reasons why you would buy food products produced in a more animal-friendly way (e.g. free-range systems)?

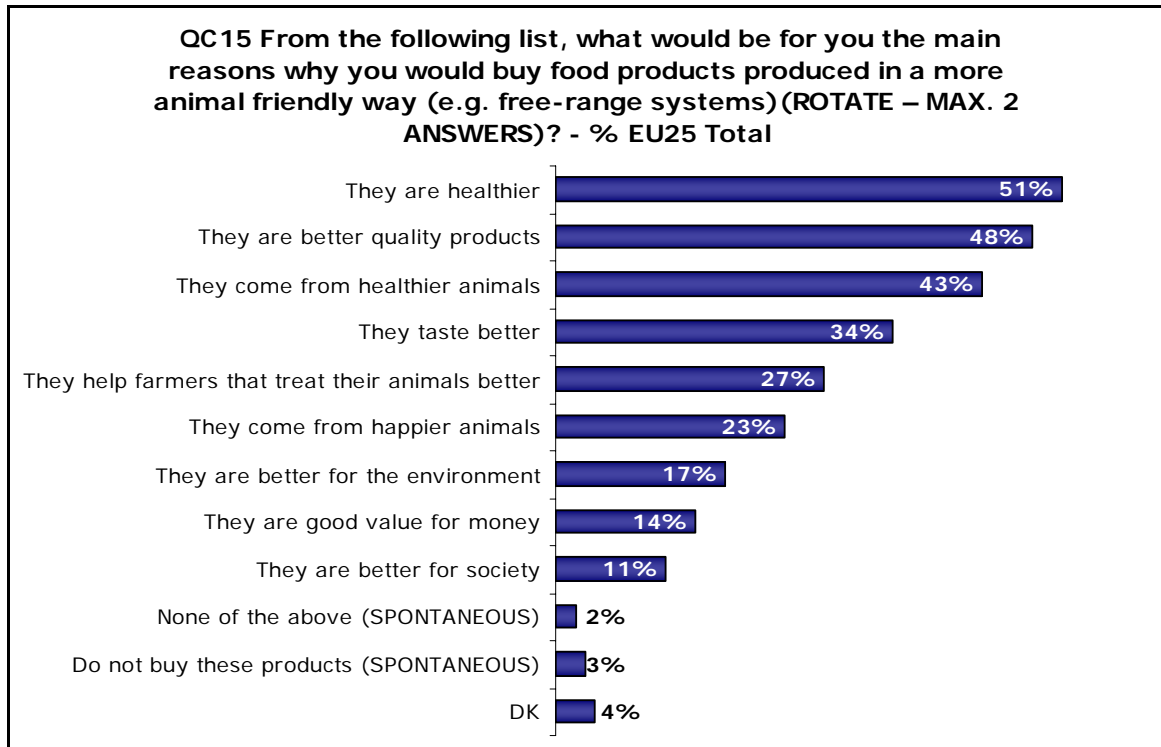
The previous major survey on the welfare of farmed animals found that, when purchasing meat products, a considerable portion of the EU public (43%) bear in mind the welfare and protection of the animals concerned²⁴. This section examines this issue in greater detail, exploring possible motivations for this shopping behaviour.

– Consumers most likely to buy animal-friendly produce because it is seen as healthier and high quality –

The principal reasons for consumers to buy welfare-friendly food largely involve the **quality of the products**. When asked to pick up to three reasons why they may buy such products, over half (51%) cited the fact that they thought these were healthier than other products. A comparable figure (48%) said that the better quality of welfare-friendly products was a reason to choose these.

²³ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229, p.45.

²⁴ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229, p.28.



Linked to the perceived healthier nature of animal-friendly products, a large proportion **(43%) mentioned their view that they come from healthier animals**. Taken together these results suggest that consumer purchasing behaviour is most likely to be influenced and changed by communications emphasising the benefits to consumers themselves in terms of health and a quality premium.

– The clearest differences in opinion are seen by country –

As would be expected across a range of countries with differing markets, income levels and cultural attitudes to animal welfare, the pattern of results described above is liable to change depending on where polls were carried out.

In **Greece and Cyprus**, these products are seen even more in terms of their **healthier nature**, with this reason being mentioned by 78% and 84% of respondents respectively.

This contrasts with attitudes in the **Netherlands and Sweden**, where less than one-third of those polled mentioned this factor. Instead the emphasis is more on the **wellbeing of farmed animals rather than consumer benefits**, with at least 4 out of every 10 in both these countries (NL 40%, SE 43%) mentioning the view that such products come from happier animals.

This variation in national attitudes is in contrast to the largely homogenous nature of opinion when it is examined by demographic segments. **Regardless of age, gender or education, the primary reasons to buy welfare-friendly products remain those related to the fact that these are seen as healthier and better quality.**

However, we do see a slightly higher concern for the happiness of farmed animals amongst the youngest section of the population. Over a quarter (27%) of those aged between 15 and 24 mentioned this as a possible reason for purchasing welfare-friendly products compared to exactly one in five of those aged 55 and over (20%).

Reasons to buy welfare friendly produce: Analysis by demographics and other opinions

From the following list, what would be for you the main reasons why you would buy food products produced in a more animal-friendly way (e.g. free-range systems)?

[% mentioning reason amongst subgroup]

	They are healthier	They come from happier animals	They come from healthier animals	They are better quality products
EU25	22%	9%	15%	16%
Age				
15-24	19%	11%	16%	16%
25-39	21%	10%	15%	17%
40-54	22%	8%	15%	16%
55 +	24%	7%	14%	14%
Farming conditions knowledge				
A lot	20%	11%	15%	16%
A little	22%	9%	16%	16%
None	22%	7%	14%	15%
Animal welfare importance				
1-3	22%	5%	9%	11%
4-7	22%	7%	13%	16%
8-10	22%	10%	17%	16%

Again, we see the importance of knowledge and subjective importance of welfare in determining secondary attitudes. **Those with a lot of knowledge of farming conditions are more likely to cite the happiness of animals (27%)** than those with no knowledge (18%). Similarly, this is **more prominent in the minds of those who think animal welfare to be highly important (26%)** than those who think it is of low importance (16%).

Importance is also a factor when it comes to the health of farmed animals with almost half (48%) of those in the high-importance group saying this may affect purchasing behaviour compared to 28% of those in the low importance group.

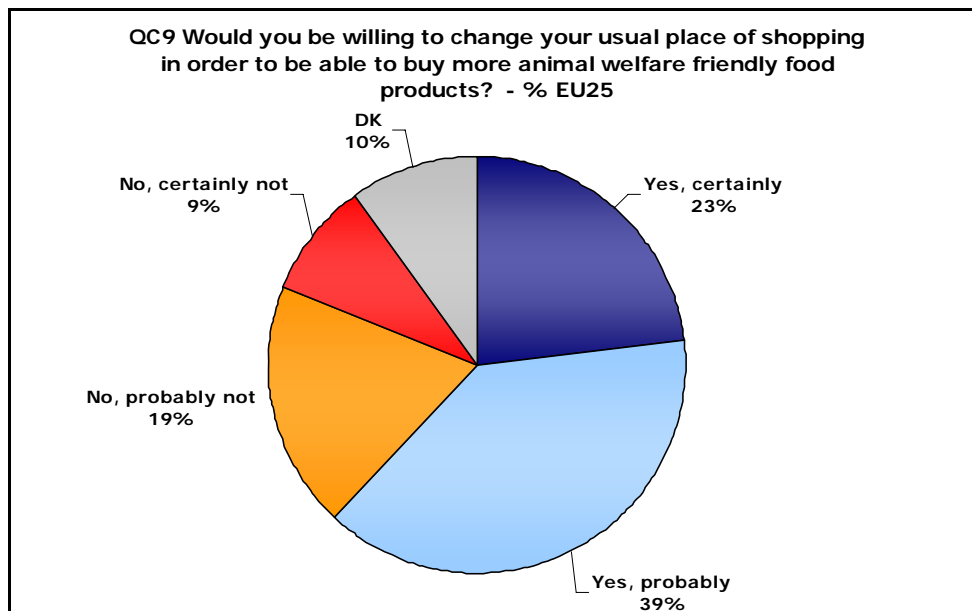
Overall, there seems to be strong recognition by consumers of the benefits for themselves of buying food produced under higher animal welfare standards. Any future change in purchasing behaviour is likely to stem from this, supplemented by a concern for the happiness and health of farmed animals.

5.2 Willingness to change shop to buy animal-friendly products

QC9. *Would you be willing to change your usual place of shopping in order to be able to buy more animal welfare friendly food products?*

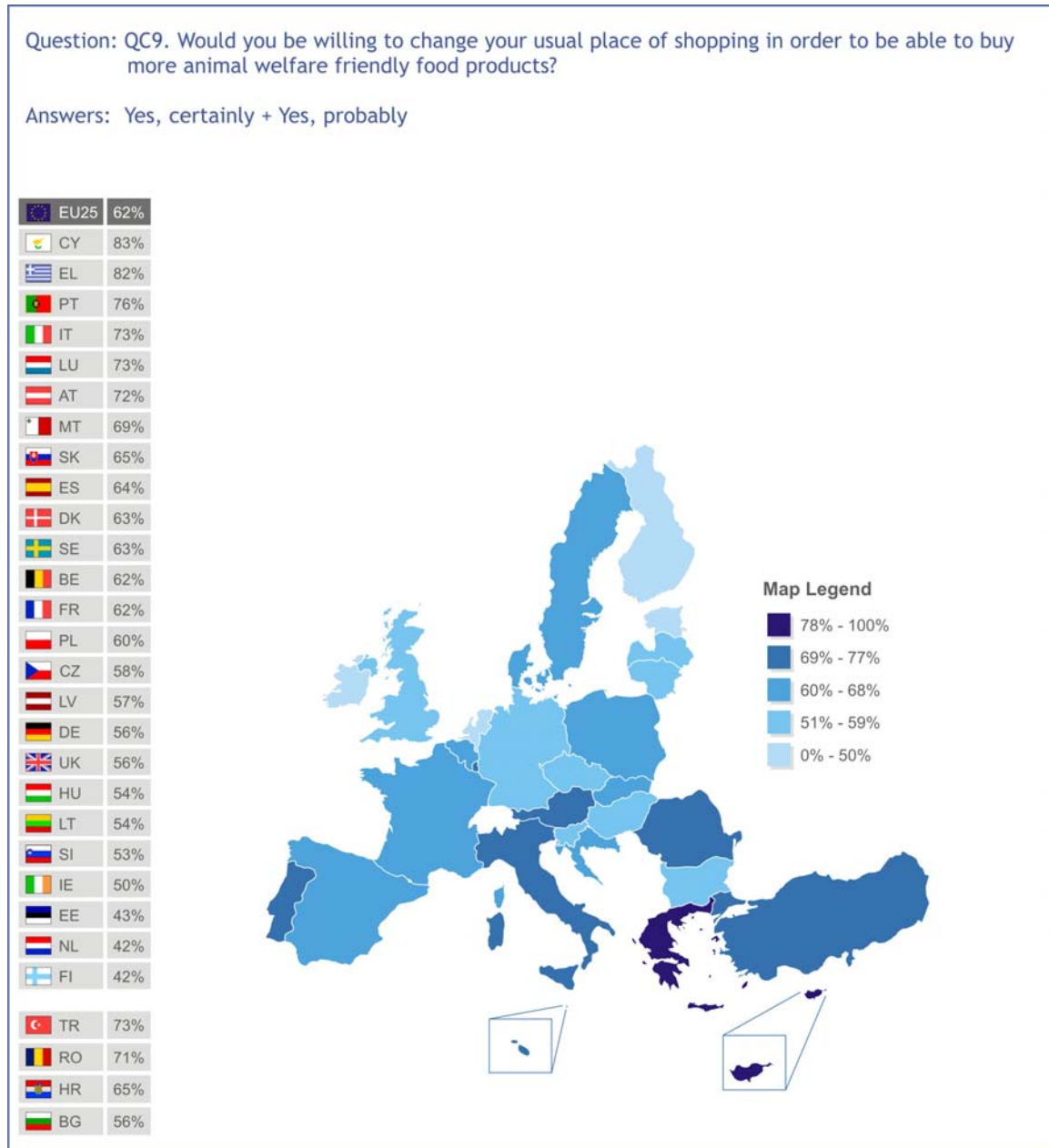
– Consumers indicate they would be prepared to change shopping habits –

The extent to which higher future animal welfare standards are likely to be demand-driven can be measured by asking consumers their willingness to change their shopping patterns due to welfare considerations.



Overall, we see a **high proportion indicating that they would be prepared to do this (62%)**, with just under a quarter (23%) indicating considerable enthusiasm for the prospect. It is notable that only 9% of respondents stated that they would certainly not be prepared to change their place of shopping (with a further 19% saying they would 'probably not' be prepared to do this)²⁵.

²⁵ These results are supported by findings in a previous survey (*Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229, p.50), where respondents were given an exercise relating to a specific aspect of their shopping. Here they were asked to what extent, if at all, they would be prepared to pay a price premium for hen's eggs sourced from an animal welfare friendly production system. A majority of citizens (57%) said that they would be prepared to pay such a premium (25% an additional 5%, 21% an additional 10%, 7% an additional 25% and 4% more than an additional 25%). Thus, whether in terms of price or shopping location, it seems there exists a considerable proportion who say they would make changes in their shopping routine in order to make choices based on welfare standards.



Once again **Cypriot (83%) and Greek (82%) respondents show particularly high regard for welfare**. Turkish, Italian, Portuguese, Austrian and Luxembourgger respondents also show an above average-willingness to switch shops.

In contrast **this idea is rejected by over half the Finnish (55%) and Dutch (52%) respondents**. It may be the case that shoppers in these countries feel they are already offered sufficient choice by their existing shops.

We see some **signs of variation by demographics, although this is slight**. Women (63%) are slightly more likely than men (59%) to say they might change. It seems income levels are also a factor, with a higher than average proportion of the unemployed saying they would be unwilling (32%) to switch. The oldest age segment is also marginally more likely than others to express this opinion (31%).

Willingness to change usual place of shopping in order to buy welfare friendly produce: Analysis by demographics and other opinions

Would you be willing to change your usual place of shopping in order to be able to buy more animal welfare friendly food products?

[Yes = 'Yes, certainly' + 'Yes, probably'; No = 'No probably not' + 'No, certainly not']

	Yes	No	DK
EU25	61%	28%	10%
Sex			
Male	59%	29%	11%
Female	63%	28%	10%
Age			
15-24	60%	28%	12%
25-39	63%	28%	9%
40-54	65%	26%	9%
55 +	57%	31%	11%
Respondent occupation scale			
Self- employed	66%	24%	10%
Managers	64%	28%	7%
Other white collars	66%	26%	8%
Manual workers	63%	28%	9%
House persons	63%	26%	11%
Unemployed	56%	32%	13%
Retired	55%	33%	12%
Students	61%	27%	12%
Subjective urbanisation			
Rural village	60%	30%	11%
Small/ mid size town	62%	28%	11%
Large town	63%	28%	9%
Animal welfare importance			
1-3	32%	53%	15%
4-7	49%	39%	12%
8-10	72%	21%	7%
Need to improve welfare			
Yes	69%	23%	8%
No	38%	56%	6%

Logically we would hypothesise a strong link between the importance consumers attach to animal welfare and their willingness to change shopping behaviour. Results prove this overwhelmingly, with over 7 out of 10 (72%) of those in the high-importance group saying they would consider switching compared to around only 3 in 10 (32%) of those in the low-importance group.

There is also a strong relationship here with the perceived need to improved welfare standards: 69% of those who say these should be improved in future also indicate that they would possibly change shops. This is further evidence of the confidence consumers have in their ability to effect change through changing their own shopping habits.

5.3 Information, labelling and the identification of animal-friendly products

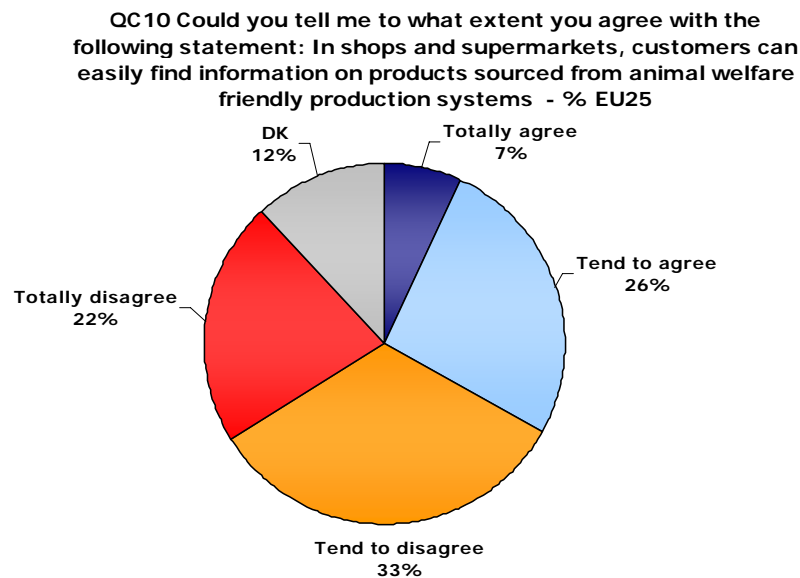
The ability of consumers to make purchasing choices is largely determined by the availability of information on the products they are buying. We end this report with an examination of this issue, with reference to the ease of finding information in shops and supermarkets, labelling, and the ideal means of conveying information on product sourcing.

5.3.1 Ease of finding information

QC10. Could you tell me to what extent you agree with the following statement:

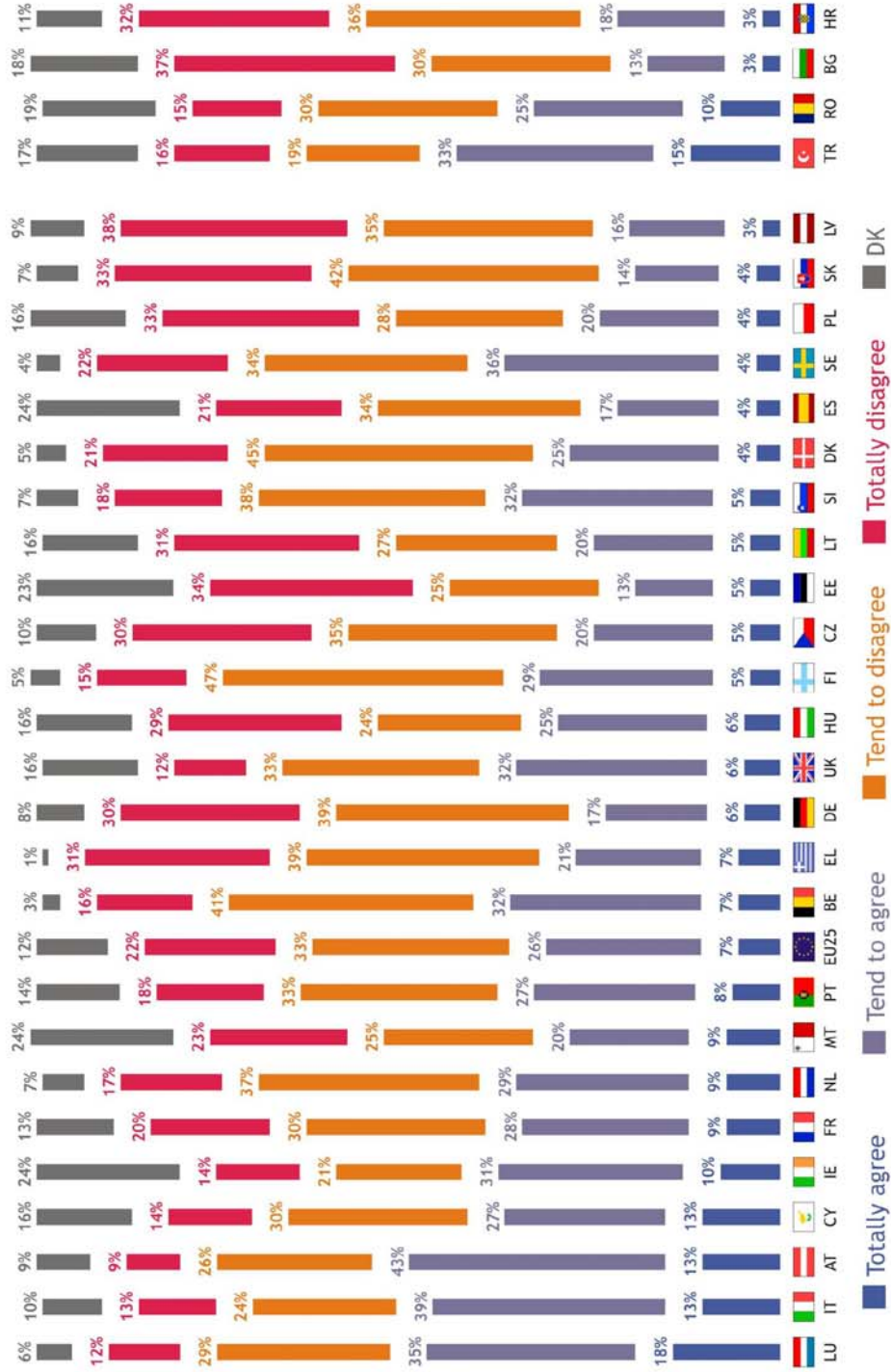
"In shops and supermarkets, customers can easily find information on products sourced from animal welfare friendly production systems"?

– Most consumers say it is hard to find information on product sourcing –



It is clear that consumers feel the information on food production systems they are provided with when shopping could be improved. **A majority of 54% disagreed when presented with the statement that finding such information was an easy exercise**, with 33% agreeing.

Question: QC10. Could you tell me to what extent you agree with the following statement: In shops and supermarkets, customers can easily find information on products sourced from animal welfare friendly production systems.



The problem seems to be particularly evident in Slovakia (75% disagreeing), Latvia (73%), Greece (70%) and Germany (69%). Grouping countries together, consumers in the **New Member States are also less likely than average to say they think that such information is easy to find (25%)**.

The situation is seen to be better in Austria, Luxembourg and Italy, where 56%, 53% and 52% respectively agree with the statement. In Turkey also, there exists a sizeable proportion of the population (48%) who think it is easy to find such information whilst shopping for food.

We can observe that the most educated express greater levels of difficulty with finding information on food sourcing. For example, 59% of those in education to the age of 20 and above voiced this opinion, compared to 51% of those finishing at 15.

A likely explanation is that those educated for longer are more likely to search for such information, and therefore express higher dissatisfaction levels. Tellingly, we see a higher level of non-response (16%) amongst the least educated group suggesting that they are less aware of this issue whilst shopping.

Ease of finding information: Analysis by demographics and other opinions

Could you tell me to what extent you agree with the following statement:

"In shops and supermarkets, customers can easily find information on products sourced from animal welfare friendly production systems"?

[Agree = 'Totally agree' + 'Tend to agree'; Disagree = 'Totally disagree' + 'Tend to Disagree']

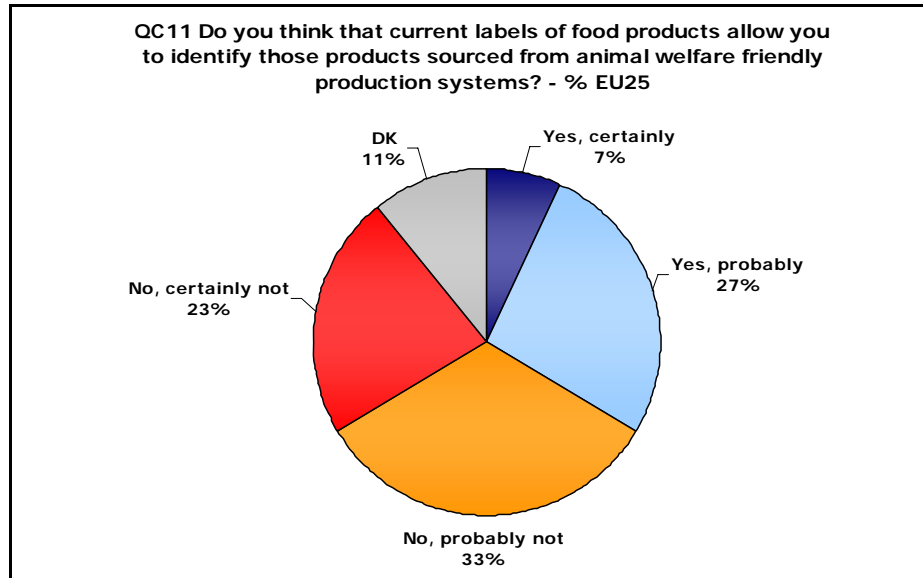
	Agree	Disagree	DK
EU25	33%	54%	12%
Education (End of)			
15	33%	51%	16%
16-19	36%	54%	10%
20+	31%	59%	10%
Still Studying	33%	53%	14%
Farming conditions knowledge			
A lot	41%	54%	5%
A little	35%	57%	8%
None	28%	51%	21%
Animal welfare importance			
1-3	33%	46%	22%
4-7	36%	51%	13%
8-10	33%	58%	8%

There are also **high levels of non-response rates amongst those with no knowledge of farming conditions (21%) and interviewees who think animal welfare is unimportant (22%)**. Amongst those who think animal welfare to be a high-importance subject, there is a greater level of disagreement (58%), showing that lack of information on such products is a more of a problem for those inclined to seek it out.

5.3.2 Labelling

QC11. Do you think that current labels of food products allow you to identify those products sourced from animal welfare friendly production systems?

– *Difficulty in finding information is reflected in views on information conveyed by current labelling* –



The need for greater information on food sourcing is in further evidenced by views on the specific matter of food labelling. Overall results here are almost exactly identical to these seen for the results on information while shopping (QC10), with **33% agreeing that labelling enables them to identify welfare-friendly products and 55% disagreeing**. Again, this seems more of a problem in the new Member States, where only 23% agree.

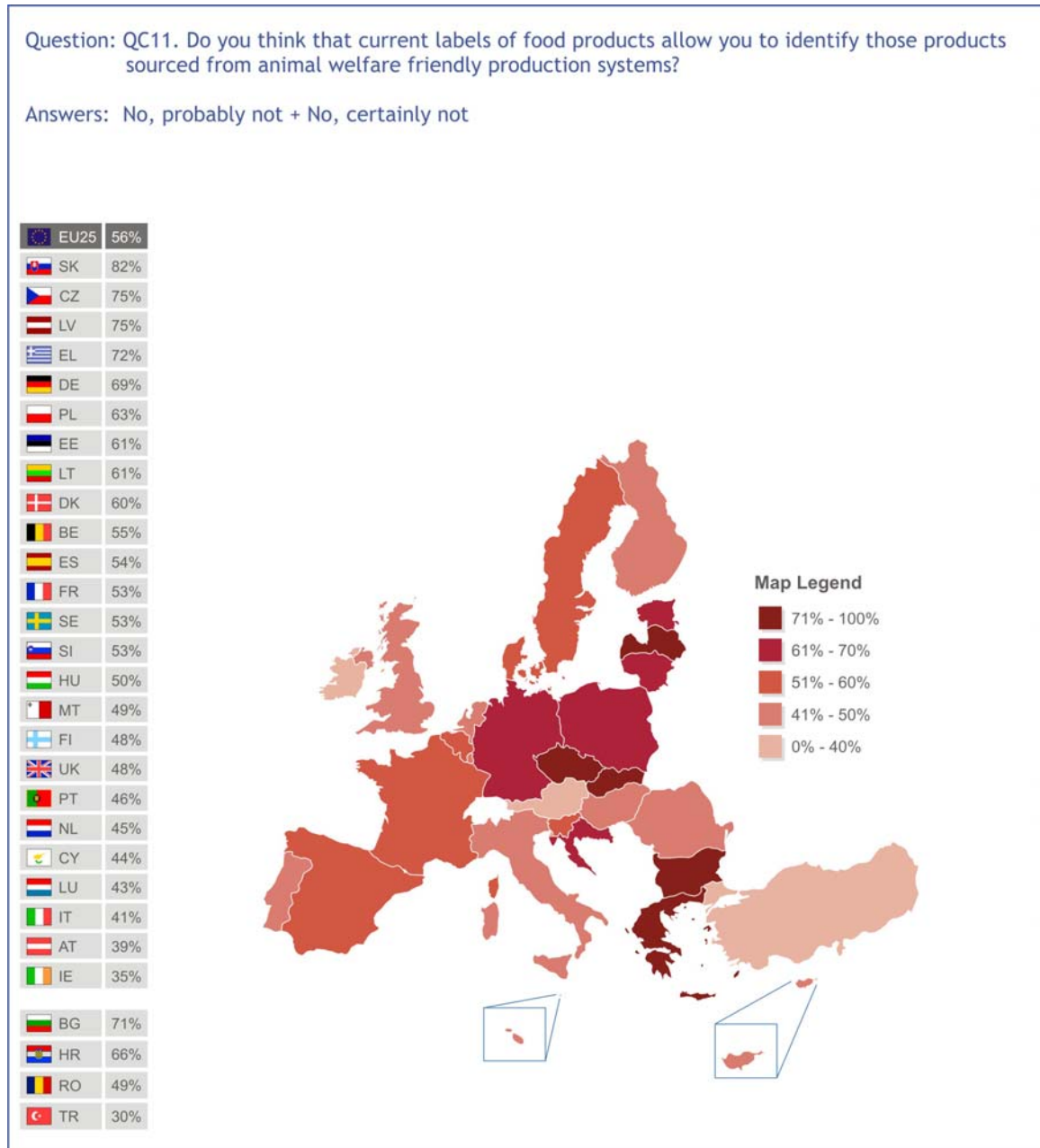
These results are very much in line with results from the previous survey on attitudes to animal welfare, where respondents were asked whether, when shopping for meat, eggs or milk, they can easily identify products sourced from animal welfare-friendly production systems from their labelling. Here over half (51%) said that they could never or rarely do this, with only one fifth (20%) saying they could most of the time and 23% some of the time. Again it was notable that this was particularly a problem in the new Member States²⁶.

With the exception of eggs²⁷, labelling schemes in the countries of the EU tend to be largely voluntary when it comes to the issue of the animal welfare conditions under which animals are farmed. Consequently, we see much variation between countries when it comes to results for this question and indeed, the preceding question.

²⁶ *Attitudes of consumers towards the welfare of farmed animals*, Special Eurobarometer 229, p.31.

²⁷ See here: *Council Regulation (EC) No 2052/2003* (17 November 2003) amending Regulation (EEC) No 1907/90 on certain marketing standards for eggs.

http://eurlex.europa.eu/LexUriServ/site/en/oj/2003/l_305/l_30520031122en00010002.pdf



Slovakia is again the country where consumers say they are least informed, with over 8 in 10 (82%) saying food labels do not allow them to identify products sourced from animal-friendly production systems. This is also especially a problem in Latvia and the Czech Republic (both 75%). Again this is supported by previous results, where only 14% of Latvians, 12% of Slovaks and 9% of Czechs said they could identify welfare-friendly produce from meat, egg and milk labelling at least some of the time²⁸

²⁸ Attitudes of consumers towards the welfare of farmed animals, Special Eurobarometer 229, p.31.

The countries where labelling is seen as more sufficient are to a large extent those where we have seen more favourable opinions on the sufficiency of information in the previous question: 56% of Austrians, 52% of Luxembourgers, and 48% of Italians are happy with the sufficiency of labelling information. In the previous survey on egg, meat and milk labelling, Austria and Luxembourg again ranked highly – with 69% and 64% respectively saying they could identify welfare-friendly produce some or most of the time.

With regards to education levels, we again see a very similar pattern to that for information in general when shopping – i.e. a slightly higher non-response rate amongst the least educated indicating they are probably less likely to look for welfare information in labels.

Ease of identifying information from product labelling: Analysis by demographics and other opinions

Do you think that current labels of food products allow you to identify those products sourced from animal welfare friendly production systems?

[Yes = 'Yes, certainly' + 'Yes, probably'; No = 'No probably not' + 'No, certainly not']

	Yes	No	DK
EU25	34%	55%	11%
Education (End of)			
15	32%	54%	14%
16-19	35%	56%	9%
20+	33%	58%	9%
Still Studying	37%	51%	12%
Farming conditions knowledge			
A lot	43%	53%	4%
A little	36%	57%	7%
None	27%	54%	19%
Animal welfare importance			
1-3	33%	47%	20%
4-7	35%	53%	12%
8-10	34%	58%	7%

Cross-analysis with knowledge and the importance of animal welfare as a subject also demonstrates very similar results to those seen for QC10 in terms of lower non-response rates, and a greater level of dissatisfaction amongst high-knowledge and high-importance subgroups.

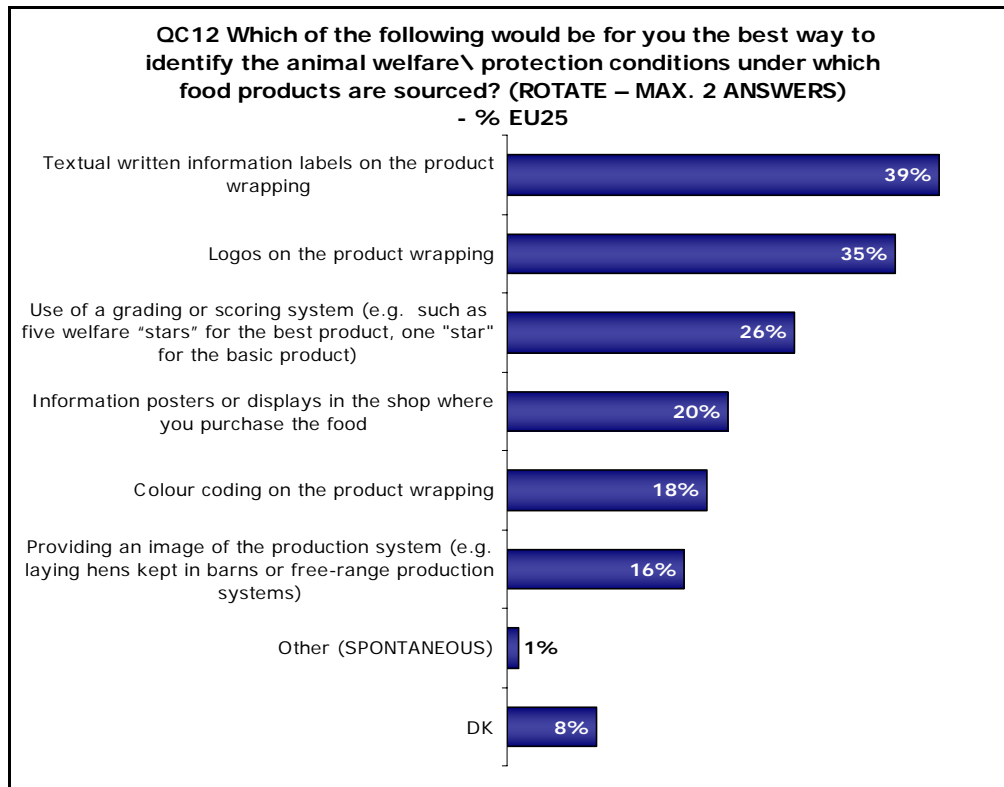
Again there are **high levels of non-response amongst those with no knowledge of farming conditions (19%) and interviewees who think animal welfare is unimportant (20%)**. Looking at those who think animal welfare to be a high-importance subject, we see that 58% say that they do not find it easy to find information from labelling. This is exactly the same proportion as answer that they do find it easy to find such information in general when shopping.

Thus it seems that product identification is largely thought of in terms of labelling, a finding that is further supported responses to the final question below.

5.3.3 Preferred sources of identification.

QC12. Which of the following would be for you the best way to identify the animal welfare-protection conditions under which food products are sourced? (pick a maximum of up to 2 answers)

– **Labelling is seen as the best means of identifying product sourcing** –



Consumers' preferred means of identifying welfare protection systems is through labelling. **Around four in ten (39%) say they would like to receive information via text on product wrapping, with a similar proportion (35%) saying logos here would be a good method of identification.**

Though there is little difference at an overall level between preference for text or logos, respondents in individual countries often show a clear liking for one method over the other. **Text is particular favoured by Cypriots (73%), Greeks (59%), Swedes (56%) and Romanians (53%),** with only 9% of the latter mentioning logos. **Logos are more preferred in the Netherlands and Belgium (both 49%).**

Beyond labelling, there are some countries where alternative sources of identification may also be viable. Swedes, Irish (both 39%) and Cypriots (35%) all show a degree of acceptance of the idea of posters or displays in shops. Meanwhile Danes were favourable to a star rating system (e.g. * = basic standard, ***** = high), with 44% choosing this option.

- ***Text more universally understandable than logos, and appeals more to those interested in welfare –***

Information in the form of **text** looks to have an advantage over logos in that it **appeals equally to all segments of the EU population**. In particular, logos may be slightly less popular amongst the oldest and less educated consumers, with 30% of both these groups showing a liking for logos compared to 42% of the youngest age group and 37% of the most educated.

Text versus logos: Analysis by demographics and other opinions

Which of the following would be for you the best way to identify the animal welfare-protection conditions under which food products are sourced? (pick a maximum of up to 2 answers)

[% mentioning method amongst subgroup]

	Textual written information labels on the product wrapping	Logos on the product wrapping
EU25	39%	35%
Age		
15-24	39%	42%
25-39	39%	38%
40-54	39%	35%
55 +	40%	30%
Education (End of)		
15	40%	30%
16-19	38%	36%
20+	42%	37%
Still Studying	40%	43%

We also see that there is little difference between preference for text and for logos amongst the groups who say they have no desire to be better informed (text 35%, logos 36%) or that animal welfare is unimportant (text 32%, logos 31%).

Instead it is among those who see the subject as an important one, or who wish to be further informed that a clearer view emerges. Of the high importance group, 42% mention text compared to 36% who cite logos and for those who desire to be more informed, the difference is greater still – 43% compared to 35%.

Overall, it is clear that consumers would prefer to receive sourcing information via product labels. Doing this via text has the advantage of appealing more to those who are most interested in such information, although it must be remembered there are some countries where consumers would more prefer logos.

CONCLUSION

This survey has demonstrated that **there is a considerable interest in animal welfare standards**. This is reflected in the **demand for more information**, whether that be in the form of information on standards in general, or on specific products. Meeting this demand would enable the European public to fulfil an important role as informed advocates for higher animal welfare standards.

We have seen detailed evidence of consumer behaviour in this area. **A majority (63%) show some willingness to change their usual place of shopping** in order to be able to purchase more animal welfare-friendly products. Reasons consumers may make purchases in this way are related to the perception of such products as being **healthier and of higher quality**.

To make such choices, it is crucial that the public has information that enables them to determine the welfare conditions that lie behind the products they see on shelves. Results from this survey show that this information needs to be improved. Just over half of all respondents (53%) say that they cannot easily find this information, with a similar proportion (54%) saying that food labels do not enable them to make the identification.

This issue of labelling is particularly important, as we have seen that this would form the best method of product identification, whether in the form of **text or logos on wrapping**. It is important that any developments here are made with consideration for **national and cultural contexts**: Citizens in different countries have varying preferences for text, logos, or occasionally alternative methods.

On the matter of current animal welfare standards in individual countries, **most citizens (61%) are of the belief that standards have improved over the last decade**, with very few (8%) saying they have worsened. However, there is a strong feeling that further improvements are necessary, with almost 8 out of 10 (77%) expressing this opinion. Thus it seems most see standards as following an upward trend towards an envisioned end point of even higher standards.

Farmers (40%) are considered to be best-placed to ensure these welfare improvements, with veterinarians (26%), national governments (25%) and animal welfare protection organisations (24%) also viewed as having important supplementary roles. Again it should be noted that there are considerable variations to this pattern in individual countries, in particular with farmers seen as even more influential in the new Member States (51%).

Thinking further about farmers, Europeans have very clear opinions on whether producers should be rewarded for applying higher standards. Over 7 out of 10 (72%) agree with the principle that financial compensation should be used to alleviate any higher costs associated with improving such welfare standards. An even more overwhelming majority (90%) believe that the same animal welfare standards should also be applied to products imported from outside of the EU.

In essence, Europeans are reasonably well-informed on farming conditions, but desire to know more. Almost 7 in every 10 (69%) claim to have at least some knowledge on farming conditions in their country. However, confidence in the extent of this knowledge is limited, with only 12% saying they know 'a lot'. Given that this is seen as an important subject, it is unsurprising that many wish to be more informed about farming conditions, with 58% expressing this opinion.

It must be remembered that European knowledge is not homogenous in this regard. Some citizens, in particular those in the Nordic countries, claim knowledge levels well above the European average. Meanwhile those in Spain and Malta appear relatively under-informed. The primary influence on knowledge levels is an interest in the subject, knowledge also being higher amongst the more educated and rural sectors of the population. Respondents in many of the Mediterranean countries also express a particular desire to be further informed.

The source by which the public would most like to receive more information is via television, which around half (51%) of the population would use. A sizeable proportion, particularly amongst the young, would also use the internet to find such information, and newspapers are a popular option in certain countries.

Finally, **the importance attached to the welfare of farmed animals is one of the clearest findings of this survey**, with the average respondent rating the subject at almost 8 out of 10 on a maximum scale of 10 in this regard. The evidence presented here suggests that many are prepared to translate this view into their purchasing habits, if they are provided with the information to make such choices.

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ANNEXES

TECHNICAL SPECIFICATIONS

SPECIAL EUROBAROMETER N° 270

“ATTITUDES OF CONSUMERS TOWARDS THE WELFARE/ PROTECTION OF FARM ANIMALS”

TECHNICAL SPECIFICATIONS

Between the 6th of September and the 10th of October 2006, TNS Opinion & Social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 66.1 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate General Communication, “Public Opinion and Media Monitoring”.

The SPECIAL EUROBAROMETER N°270 is part of wave 66.1 covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The EUROBAROMETER 66.1 has also 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	N° INTERVIEWS	FIELDWORK DATES	POPULATION 15+
BE	Belgium	TNS Dimarso	1.003	06/09/2006 01/10/2006	8.650.994
CZ	Czech Rep.	TNS Aisa	1.091	07/09/2006 26/09/2006	8.571.710
DK	Denmark	TNS Gallup DK	1.003	09/09/2006 10/10/2006	4.411.580
DE	Germany	TNS Infratest	1.525	08/09/2006 04/10/2006	64.361.608
EE	Estonia	Emor	1.000	08/09/2006 02/10/2006	887.094
EL	Greece	TNS ICAP	1.000	06/09/2006 03/10/2006	8.693.566
ES	Spain	TNS Demoscopia	1.003	06/09/2006 05/10/2006	37.024.972
FR	France	TNS Sofres	1.007	06/09/2006 30/09/2006	44.010.619
IE	Ireland	TNS MRBI	1.000	06/09/2006 10/10/2006	3.089.775
IT	Italy	TNS Abacus	1.006	07/09/2006 05/10/2006	48.892.559
CY	Rep. of Cyprus	Synovate	503	06/09/2006 01/10/2006	596.752
LV	Latvia	TNS Latvia	1.015	08/09/2006 09/10/2006	1.418.596
LT	Lithuania	TNS Gallup Lithuania	1.000	06/09/2006 02/10/2006	2.803.661
LU	Luxembourg	TNS ILReS	500	06/09/2006 04/10/2006	374.097
HU	Hungary	TNS Hungary	1.005	06/09/2006 25/09/2006	8.503.379
MT	Malta	MISCO	500	07/09/2006 04/10/2006	321.114
NL	Netherlands	TNS NIPO	1.018	06/09/2006 05/10/2006	13.030.000
AT	Austria	Österreichisches Gallup-Institut	1.016	06/09/2006 05/10/2006	6.848.736
PL	Poland	TNS OBOP	1.000	09/09/2006 04/10/2006	31.967.880
PT	Portugal	TNS EUROTESTE	995	06/09/2006 02/10/2006	8.080.915
SI	Slovenia	RM PLUS	1.031	06/09/2006 05/10/2006	1.720.137
SK	Slovakia	TNS AISA SK	1.023	13/09/2006 26/09/2006	4.316.438
FI	Finland	TNS Gallup Oy	1.000	07/09/2006 04/10/2006	4.348.676
SE	Sweden	TNS GALLUP	1.013	07/09/2006 02/10/2006	7.486.976
UK	United Kingdom	TNS UK	1.308	06/09/2006 07/10/2006	47.685.578
BG	Bulgaria	TNS BBSS	1.035	06/09/2006 20/09/2006	6.671.699
RO	Romania	TNS CSOP	1.047	07/09/2006 29/09/2006	18.173.179
HR	Croatia	Puls	1.000	07/09/2006 27/09/2006	3.722.800
TR	Turkey	TNS PIAR	1.005	06/09/2006 04/10/2006	47.583.830
TOTAL			28.652	06/09/2006 10/10/2006	444.248.920

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:

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

QUESTIONNAIRE

QC1 Could you tell me how much do you feel you know about the conditions under which animals are farmed in (OUR COUNTRY)? Would you say that you know...?

(480)

A lot	1
A little	2
Nothing at all	3
DK	4

NEW

QC2 Would you like to be more informed about the conditions under which animals are farmed in (OUR COUNTRY)?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(481)

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

NEW

QC3 If you were looking for information about the conditions under which animals are farmed in (OUR COUNTRY), which of the following sources would you use? Which else?

(SHOW CARD - READ OUT - MAX. 3 ANSWERS)

(482-491)

Television	1,
Radio	2,
Daily newspapers	3,
Other newspapers, magazines	4,
The Internet	5,
Discussions with relatives, friends, colleagues	6,
Books, brochures, information leaflets	7,
Never look for such information, not interested (SPONTANEOUS)	
Other (SPONTANEOUS)	8,
DK	9,
	10,

NEW

QC4 Please tell me on a scale of 1 to 10 how important is it to you that the welfare of farmed animals is protected? '1' means that this is "not at all important" to you and '10' means that it is "very important".

(492-493)

Not at all important	2	3	4	5	6	7	8	9	Very important
1	2	3	4	5	6	7	8	9	10

DK _____ 11

NEW _____

QC5 Do you believe that in general the welfare-protection of farm animals in (OUR COUNTRY) needs to be improved?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(494)

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

NEW _____

QC6 In general, over the last 10 years do you think that the welfare-protection of farmed animals in (OUR COUNTRY) has...?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(495)

Improved a lot	1
Improved a little	2
Remained about the same	3
Deteriorated a little	4
Deteriorated a lot	5
DK	6

NEW _____

QC7 Who do you believe can best ensure that food products have been produced in an animal welfare friendly way?

(SHOW CARD – READ OUT – ROTATE – MAX. 2 ANSWERS)

(496-505)

Farmers producing the food	1,
Shops and restaurants selling the food	2,
Consumers purchasing the food	3,
The food processing industry (food processors, animal transporters, etc.)	4,
Veterinarians	5,
The (NATIONALITY) Government	6,
The European Commission	7,
Animal protection organisations	8,
None of the above (SPONTANEOUS)	9,
DK	10,

NEW

QC8 Do you think there is currently a sufficient choice of animal welfare friendly food products for customers in shops and supermarkets?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(506)

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

NEW

QC9 Would you be willing to change your usual place of shopping in order to be able to buy more animal welfare friendly food products?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(507)

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

NEW

QC10	Could you tell me to what extent you agree with the following statement: In shops and supermarkets, customers can easily find information on products sourced from animal welfare friendly production systems.
------	--

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(508)

Totally agree	1
Tend to agree	2
Tend to disagree	3
Totally disagree	4
DK	5

NEW

QC11	Do you think that current labels of food products allow you to identify those products sourced from animal welfare friendly production systems?
------	---

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(509)

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

NEW

QC12	Which of the following would be for you the best way to identify the animal welfare\ protection conditions under which food products are sourced?
------	---

(SHOW CARD – READ OUT – ROTATE – MAX. 2 ANSWERS)

(510-517)

Information posters or displays in the shop where you purchase the food	1,
Textual written information labels on the product wrapping	2,
Logos on the product wrapping	3,
Colour coding on the product wrapping	4,
Providing an image of the production system (e.g. laying hens kept in barns or free-range production systems)	5,
Use of a grading or scoring system (e.g. such as five welfare "stars" for the best product, one "star" for the basic product)	6,
Other (SPONTANEOUS)	7,
DK	8,

NEW

QC13	Do you believe that farmers should be financially compensated for any higher production costs linked to farming animals under more welfare-friendly conditions?
------	---

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

	(518)
Yes, certainly	1
Yes, probably	2
No, probably not	3
No, certainly not	4
DK	5

NEW

QC14	Do you believe that imported foods from outside the European Union should respect the same conditions of animal welfare\ protection as those applied in the European Union?
------	---

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

	(519)
Yes, certainly	1
Yes, probably	2
No, probably not	3
No, certainly not	4
DK	5

NEW

QC15a	From the following list, what would be for you the main reasons why you would buy food products produced in a more animal friendly way (e.g. free-range systems)? Firstrly?
-------	---

QC15b	Secondly?
-------	-----------

QC15c	Thirdly?
-------	----------

(SHOW CARD - ONE ANSWER PER COLUMN)

	(520-521)	(522-523)	(524-525)
(READ OUT - ROTATE)	QC15a	QC15b	QC15c
	FIRSTLY	SECONDL Y	THIRDL Y
They are good value for money	1	1	1
They taste better	2	2	2
They are healthier	3	3	3
They come from happier animals	4	4	4
They come from healthier animals	5	5	5
They are better quality products	6	6	6
They help farmers that treat their animals better	7	7	7
They are better for the environment	8	8	8
They are better for society	9	9	9
None of the above (SPONTANEOUS)	10	10	10
Do not buy these products (SPONTANEOUS)	11	11	11
DK	12	12	12

NEW

TABLES

QC1 Could you tell me how much do you feel you know about the conditions under which animals are farmed in (OUR COUNTRY)? Would you say that you know...?

	TOTAL	A lot	A little	Nothing at all	DK
UE25 EU25	24565	12%	57%	28%	3%
BE	1003	10%	58%	31%	0%
CZ	1091	9%	53%	37%	0%
DK	1003	26%	62%	10%	2%
D-W	1018	10%	56%	30%	4%
DE	1525	12%	56%	29%	4%
D-E	507	16%	57%	24%	2%
EE	1000	10%	52%	31%	7%
EL	1000	15%	64%	21%	0%
ES	1003	7%	41%	49%	3%
FR	1007	12%	63%	23%	2%
IE	1000	18%	47%	29%	6%
IT	1006	9%	55%	30%	5%
CY	503	10%	50%	37%	2%
LV	1015	17%	61%	19%	2%
LT	1000	12%	54%	31%	3%
LU	500	16%	45%	35%	4%
HU	1005	13%	48%	38%	1%
MT	500	8%	43%	45%	5%
NL	1018	18%	66%	15%	1%
AT	1016	11%	69%	17%	3%
PL	1000	15%	62%	21%	2%
PT	995	12%	60%	26%	2%
SI	1031	13%	68%	19%	0%
SK	1023	8%	54%	36%	2%
FI	1000	24%	60%	15%	0%
SE	1013	18%	68%	13%	1%
UK	1308	16%	60%	22%	2%
BG	1035	16%	40%	39%	4%
RO	1047	29%	53%	11%	6%
HR	1000	16%	60%	22%	1%
TR	1005	18%	47%	30%	6%

QC2 Would you like to be more informed about the conditions under which animals are farmed in (OUR COUNTRY)?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	19%	39%	26%	13%	4%	58%	39%
BE	1003	17%	38%	32%	13%	0%	55%	45%
CZ	1091	14%	33%	38%	12%	3%	47%	50%
DK	1003	19%	29%	43%	8%	1%	48%	51%
D-W	1018	20%	36%	27%	13%	3%	57%	41%
DE	1525	20%	36%	27%	14%	3%	56%	41%
D-E	507	18%	37%	27%	17%	1%	55%	44%
EE	1000	9%	31%	35%	15%	9%	40%	51%
EL	1000	56%	28%	10%	6%	-	85%	15%
ES	1003	17%	44%	17%	12%	10%	61%	29%
FR	1007	22%	41%	23%	11%	3%	63%	35%
IE	1000	19%	38%	23%	10%	11%	57%	33%
IT	1006	28%	49%	12%	8%	3%	77%	20%
CY	503	50%	27%	11%	12%	1%	76%	23%
LV	1015	12%	44%	27%	13%	4%	56%	40%
LT	1000	7%	39%	28%	21%	5%	46%	50%
LU	500	30%	38%	19%	11%	2%	68%	31%
HU	1005	8%	30%	35%	24%	2%	38%	60%
MT	500	32%	34%	23%	10%	2%	66%	33%
NL	1018	11%	20%	38%	31%	1%	30%	69%
AT	1016	19%	49%	21%	6%	4%	68%	28%
PL	1000	8%	45%	32%	9%	6%	53%	41%
PT	995	26%	54%	13%	6%	2%	79%	19%
SI	1031	12%	41%	33%	13%	1%	53%	46%
SK	1023	14%	42%	33%	8%	3%	56%	41%
FI	1000	7%	35%	41%	16%	1%	42%	57%
SE	1013	22%	36%	34%	6%	1%	59%	40%
UK	1308	12%	29%	37%	19%	3%	41%	56%
BG	1035	20%	35%	23%	15%	7%	55%	38%
RO	1047	29%	45%	15%	5%	6%	74%	20%
HR	1000	26%	40%	19%	11%	3%	67%	30%
TR	1005	29%	40%	11%	11%	8%	70%	22%

QC3 If you were looking for information about the conditions under which animals are farmed in (OUR COUNTRY), which of the following sources would you use? Which else? (MAX. 3 ANSWERS)

	TOTAL	Television	Radio	Daily newspapers	Other newspapers, magazines	The Internet	Discussions with relatives, friends, colleagues	Books, brochures, information leaflets	Never look for such information, not interested (SPONTANEOUS)	Other (SPONTANEOUS)	DK
UE25 EU25	24565	51%	16%	29%	15%	30%	17%	18%	10%	1%	3%
BE	1003	48%	16%	28%	16%	40%	16%	21%	12%	2%	0%
CZ	1091	53%	18%	39%	16%	30%	15%	14%	12%	0%	3%
DK	1003	38%	17%	33%	10%	59%	31%	29%	3%	2%	2%
D-W	1018	59%	16%	45%	19%	30%	12%	18%	4%	1%	4%
DE	1525	61%	18%	44%	19%	29%	13%	18%	5%	1%	4%
D-E	507	68%	24%	43%	17%	25%	15%	19%	5%	1%	2%
EE	1000	46%	20%	26%	13%	29%	16%	8%	17%	2%	6%
EL	1000	61%	15%	23%	9%	14%	28%	21%	7%	2%	0%
ES	1003	53%	19%	21%	6%	15%	13%	7%	18%	1%	8%
FR	1007	43%	14%	23%	25%	39%	25%	26%	10%	1%	1%
IE	1000	50%	26%	36%	15%	21%	18%	17%	13%	2%	3%
IT	1006	53%	15%	27%	18%	18%	9%	18%	8%	2%	6%
CY	503	64%	21%	26%	8%	17%	34%	25%	10%	2%	-
LV	1015	46%	19%	23%	16%	28%	21%	11%	14%	0%	2%
LT	1000	54%	25%	28%	14%	28%	15%	8%	6%	0%	7%
LU	500	44%	23%	34%	16%	35%	28%	24%	7%	3%	1%
HU	1005	53%	19%	24%	9%	12%	15%	6%	21%	0%	4%
MT	500	58%	18%	26%	11%	28%	19%	17%	9%	2%	1%
NL	1018	38%	11%	32%	13%	57%	19%	16%	5%	3%	1%
AT	1016	58%	30%	49%	23%	17%	20%	14%	9%	1%	1%
PL	1000	64%	20%	21%	6%	21%	19%	8%	10%	1%	3%
PT	995	72%	18%	34%	21%	17%	13%	15%	6%	1%	3%
SI	1031	51%	18%	34%	14%	30%	30%	16%	11%	1%	0%
SK	1023	57%	24%	26%	23%	30%	27%	21%	10%	0%	2%
FI	1000	36%	9%	38%	11%	39%	41%	19%	8%	2%	1%
SE	1013	50%	23%	43%	30%	44%	25%	34%	2%	2%	1%
UK	1308	34%	10%	22%	6%	48%	16%	24%	15%	1%	2%
BG	1035	63%	18%	22%	11%	13%	24%	16%	14%	0%	7%
RO	1047	66%	26%	25%	9%	16%	25%	17%	12%	1%	6%
HR	1000	54%	13%	26%	11%	26%	24%	24%	9%	0%	4%
TR	1005	63%	18%	24%	10%	19%	28%	13%	4%	1%	10%

QC4 Please tell me on a scale of 1 to 10 how important is it to you that the welfare of farmed animals is protected? '1' means that this is "not at all important" to you and '10' means that it is "very important".

	TOTAL	Not at all important	2	3	4	5	6	7	8	9	Very important	DK	Average
UE25 EU25	24565	2%	1%	2%	3%	9%	9%	12%	15%	10%	34%	3%	7,8
BE	1003	2%	1%	2%	3%	10%	8%	14%	18%	9%	33%	0%	7,7
CZ	1091	4%	1%	3%	4%	11%	8%	12%	14%	8%	34%	2%	7,5
DK	1003	0%	1%	2%	2%	5%	3%	8%	16%	10%	52%	1%	8,6
D-W	1018	1%	1%	2%	3%	8%	8%	9%	16%	11%	38%	2%	8,0
DE	1525	2%	1%	2%	3%	8%	7%	9%	16%	11%	40%	2%	8,1
D-E	507	2%	1%	2%	3%	7%	6%	6%	14%	12%	47%	1%	8,3
EE	1000	3%	1%	4%	2%	9%	7%	10%	17%	6%	33%	9%	7,6
EL	1000	1%	1%	2%	2%	5%	5%	8%	11%	12%	54%	-	8,6
ES	1003	2%	2%	4%	6%	11%	14%	15%	15%	9%	16%	8%	6,9
FR	1007	2%	1%	2%	3%	11%	7%	12%	19%	9%	32%	2%	7,8
IE	1000	2%	2%	3%	3%	6%	6%	11%	13%	10%	38%	8%	8,0
IT	1006	1%	3%	2%	3%	8%	10%	11%	14%	9%	37%	2%	7,8
CY	503	0%	1%	1%	0%	4%	3%	5%	12%	9%	65%	1%	9,1
LV	1015	3%	2%	5%	3%	14%	9%	9%	12%	8%	31%	4%	7,3
LT	1000	9%	2%	3%	4%	13%	7%	8%	11%	5%	32%	5%	6,9
LU	500	1%	0%	2%	2%	5%	4%	9%	15%	12%	50%	1%	8,6
HU	1005	3%	2%	5%	6%	11%	7%	10%	13%	6%	31%	5%	7,3
MT	500	1%	1%	1%	3%	4%	3%	6%	15%	9%	57%	0%	8,7
NL	1018	1%	1%	2%	2%	7%	12%	22%	23%	7%	22%	1%	7,6
AT	1016	1%	1%	3%	4%	11%	8%	12%	15%	11%	31%	2%	7,7
PL	1000	1%	2%	3%	3%	12%	11%	13%	14%	8%	30%	4%	7,5
PT	995	0%	0%	2%	3%	7%	7%	12%	22%	20%	26%	1%	8,0
SI	1031	1%	1%	1%	1%	8%	6%	10%	19%	11%	42%	2%	8,3
SK	1023	2%	2%	5%	5%	9%	9%	11%	17%	12%	25%	3%	7,3
FI	1000	0%	0%	0%	1%	4%	3%	8%	21%	18%	44%	0%	8,7
SE	1013	1%	0%	0%	1%	2%	3%	9%	15%	9%	60%	0%	9,0
UK	1308	2%	1%	3%	3%	11%	8%	11%	12%	9%	38%	2%	7,8
BG	1035	2%	1%	3%	3%	9%	9%	10%	12%	13%	31%	4%	7,6
RO	1047	1%	2%	3%	3%	7%	9%	10%	11%	11%	38%	6%	8,0
HR	1000	3%	1%	2%	3%	10%	7%	14%	10%	8%	42%	1%	7,9
TR	1005	2%	1%	3%	4%	9%	7%	9%	14%	10%	38%	3%	7,9

QC5 Do you believe that in general the welfare–protection of farm animals in (OUR COUNTRY) needs to be improved?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	35%	42%	11%	2%	10%	77%	13%
BE	1003	32%	51%	12%	1%	4%	83%	13%
CZ	1091	39%	37%	11%	2%	10%	77%	13%
DK	1003	42%	39%	16%	1%	2%	80%	18%
D-W	1018	43%	35%	13%	4%	6%	78%	16%
DE	1525	43%	35%	13%	3%	6%	78%	16%
D-E	507	42%	38%	12%	3%	6%	79%	15%
EE	1000	32%	40%	7%	2%	19%	72%	9%
EL	1000	66%	29%	3%	1%	1%	96%	3%
ES	1003	29%	42%	7%	2%	19%	71%	9%
FR	1007	39%	46%	7%	1%	7%	86%	7%
IE	1000	19%	39%	15%	3%	23%	58%	18%
IT	1006	33%	43%	8%	4%	12%	76%	12%
CY	503	71%	20%	1%	0%	7%	91%	2%
LV	1015	29%	52%	9%	1%	8%	81%	11%
LT	1000	29%	50%	7%	3%	12%	79%	10%
LU	500	29%	35%	16%	3%	18%	63%	19%
HU	1005	31%	45%	9%	3%	12%	76%	12%
MT	500	43%	40%	6%	0%	12%	82%	6%
NL	1018	35%	35%	19%	3%	7%	71%	22%
AT	1016	26%	45%	16%	3%	9%	72%	20%
PL	1000	28%	52%	9%	1%	10%	80%	10%
PT	995	43%	47%	4%	0%	6%	90%	4%
SI	1031	33%	50%	9%	1%	7%	83%	10%
SK	1023	37%	46%	7%	1%	10%	83%	7%
FI	1000	18%	49%	29%	3%	2%	67%	31%
SE	1013	29%	40%	27%	3%	1%	68%	30%
UK	1308	25%	43%	16%	2%	14%	69%	18%
BG	1035	43%	38%	3%	1%	15%	81%	4%
RO	1047	53%	36%	2%	1%	8%	89%	2%
HR	1000	49%	39%	5%	1%	6%	88%	6%
TR	1005	47%	41%	2%	1%	9%	88%	3%

QC6 In general, over the last 10 years do you think that the welfare–protection of farmed animals in (OUR COUNTRY) has...?

	TOTAL	Improved a lot	Improved a little	Remained about the same	Deteriorated a little	Deteriorated a lot	DK	Improved	Deteriorated
UE25 EU25	24565	12%	48%	20%	5%	2%	13%	60%	7%
BE	1003	11%	57%	22%	5%	1%	4%	68%	6%
CZ	1091	13%	42%	26%	6%	3%	9%	55%	10%
DK	1003	15%	48%	21%	10%	2%	5%	62%	12%
D-W	1018	12%	49%	21%	5%	2%	11%	61%	7%
DE	1525	12%	49%	21%	6%	2%	10%	61%	8%
D-E	507	10%	50%	23%	6%	4%	7%	59%	10%
EE	1000	12%	47%	13%	5%	2%	22%	59%	7%
EL	1000	18%	39%	27%	8%	6%	3%	57%	14%
ES	1003	11%	35%	19%	5%	3%	28%	46%	7%
FR	1007	13%	50%	18%	6%	2%	11%	63%	9%
IE	1000	31%	30%	11%	1%	1%	25%	62%	2%
IT	1006	8%	49%	21%	6%	3%	12%	58%	9%
CY	503	34%	43%	7%	2%	1%	13%	77%	3%
LV	1015	11%	54%	17%	3%	2%	12%	66%	5%
LT	1000	8%	52%	19%	4%	2%	15%	60%	6%
LU	500	13%	44%	19%	4%	2%	19%	57%	5%
HU	1005	6%	37%	24%	10%	9%	14%	43%	19%
MT	500	23%	50%	14%	1%	0%	11%	73%	2%
NL	1018	15%	56%	15%	6%	2%	6%	71%	8%
AT	1016	14%	49%	23%	5%	2%	7%	63%	6%
PL	1000	13%	54%	18%	3%	2%	10%	67%	5%
PT	995	12%	52%	21%	2%	2%	12%	64%	4%
SI	1031	12%	50%	22%	5%	1%	10%	62%	6%
SK	1023	4%	33%	37%	9%	5%	12%	37%	14%
FI	1000	15%	54%	21%	7%	1%	3%	68%	8%
SE	1013	17%	62%	13%	6%	1%	2%	79%	6%
UK	1308	13%	45%	19%	3%	1%	18%	59%	4%
BG	1035	3%	22%	29%	13%	7%	27%	25%	20%
RO	1047	11%	44%	21%	5%	4%	16%	55%	9%
HR	1000	7%	44%	26%	5%	2%	15%	51%	8%
TR	1005	8%	45%	19%	4%	3%	20%	53%	7%

QC7 Who do you believe can best ensure that food products have been produced in an animal welfare friendly way? (ROTATE – MAX. 2 ANSWERS)

	TOTAL	Farmers producing the food	Shops and restaurants selling the food	Consumers purchasing the food	The food processing industry (food processors, animal transporters, etc.)	Veterinarians	The (NATIONALITY) Government	The European Commission	Animal protection organisations	None of the above (SPONTANEOUS)	DK
UE25 EU25	24565	40%	5%	11%	18%	26%	25%	13%	24%	1%	6%
BE	1003	32%	7%	9%	15%	28%	29%	20%	28%	1%	1%
CZ	1091	43%	4%	4%	26%	35%	15%	7%	33%	1%	3%
DK	1003	49%	7%	19%	21%	30%	22%	8%	26%	1%	1%
D-W	1018	41%	4%	23%	19%	17%	24%	16%	27%	1%	4%
DE	1525	42%	3%	21%	20%	17%	24%	16%	28%	1%	4%
D-E	507	50%	3%	14%	22%	20%	25%	13%	28%	1%	2%
EE	1000	48%	5%	11%	23%	20%	7%	2%	31%	1%	13%
EL	1000	50%	5%	8%	15%	39%	30%	15%	14%	3%	0%
ES	1003	23%	2%	3%	18%	22%	41%	14%	14%	1%	17%
FR	1007	41%	4%	8%	14%	49%	14%	11%	33%	1%	5%
IE	1000	51%	11%	14%	14%	15%	34%	10%	16%	1%	9%
IT	1006	30%	10%	11%	15%	31%	22%	17%	25%	1%	5%
CY	503	40%	3%	12%	12%	25%	46%	20%	20%	1%	4%
LV	1015	70%	3%	4%	11%	25%	18%	4%	22%	1%	5%
LT	1000	45%	3%	4%	21%	29%	19%	6%	25%	1%	7%
LU	500	46%	5%	10%	10%	40%	23%	10%	26%	2%	2%
HU	1005	43%	7%	7%	28%	21%	24%	7%	12%	2%	8%
MT	500	28%	2%	4%	13%	38%	34%	11%	32%	0%	4%
NL	1018	28%	6%	14%	19%	8%	38%	23%	27%	1%	5%
AT	1016	40%	12%	23%	20%	16%	21%	10%	31%	1%	2%
PL	1000	59%	2%	6%	12%	28%	16%	9%	24%	1%	5%
PT	995	48%	11%	11%	25%	28%	30%	8%	19%	1%	3%
SI	1031	49%	2%	7%	31%	35%	20%	9%	23%	1%	2%
SK	1023	53%	6%	6%	36%	31%	16%	7%	26%	0%	3%
FI	1000	55%	6%	10%	35%	34%	12%	7%	19%	1%	1%
SE	1013	60%	3%	21%	22%	36%	14%	5%	28%	0%	1%
UK	1308	37%	6%	13%	15%	14%	34%	10%	22%	2%	10%
BG	1035	51%	5%	7%	22%	27%	33%	7%	12%	0%	10%
RO	1047	51%	16%	7%	25%	30%	15%	4%	14%	1%	9%
HR	1000	59%	3%	8%	28%	23%	22%	5%	13%	1%	6%
TR	1005	47%	10%	12%	16%	21%	33%	4%	4%	0%	11%

QC8 Do you think there is currently a sufficient choice of animal welfare friendly food products for customers in shops and supermarkets?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	12%	33%	25%	13%	17%	45%	38%
BE	1003	24%	44%	20%	8%	5%	68%	27%
CZ	1091	8%	30%	27%	18%	17%	38%	45%
DK	1003	12%	38%	34%	9%	6%	50%	44%
D-W	1018	11%	25%	31%	18%	15%	36%	49%
DE	1525	11%	27%	30%	18%	14%	37%	48%
D-E	507	12%	31%	29%	18%	11%	43%	47%
EE	1000	8%	29%	20%	12%	31%	37%	32%
EL	1000	13%	25%	33%	28%	1%	38%	61%
ES	1003	7%	24%	28%	13%	28%	31%	41%
FR	1007	18%	35%	20%	11%	17%	53%	30%
IE	1000	15%	32%	17%	10%	26%	47%	27%
IT	1006	11%	43%	21%	10%	15%	54%	31%
CY	503	26%	28%	18%	11%	16%	55%	29%
LV	1015	8%	31%	30%	15%	17%	39%	44%
LT	1000	10%	36%	21%	13%	20%	46%	34%
LU	500	23%	39%	23%	6%	8%	62%	29%
HU	1005	9%	31%	24%	15%	22%	40%	39%
MT	500	15%	32%	16%	7%	30%	47%	23%
NL	1018	27%	38%	19%	8%	8%	65%	27%
AT	1016	9%	40%	31%	12%	9%	49%	43%
PL	1000	6%	32%	21%	14%	27%	37%	35%
PT	995	13%	26%	27%	17%	16%	39%	44%
SI	1031	11%	43%	27%	8%	9%	55%	36%
SK	1023	5%	26%	34%	22%	12%	32%	57%
FI	1000	14%	51%	23%	5%	7%	65%	28%
SE	1013	10%	39%	31%	11%	9%	48%	42%
UK	1308	12%	36%	26%	8%	18%	48%	34%
BG	1035	7%	20%	28%	21%	24%	27%	49%
RO	1047	14%	36%	17%	10%	24%	49%	27%
HR	1000	10%	29%	26%	19%	17%	39%	44%
TR	1005	19%	44%	13%	9%	15%	63%	22%

QC9 Would you be willing to change your usual place of shopping in order to be able to buy more animal welfare friendly food products?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	23%	39%	19%	9%	10%	61%	28%
BE	1003	20%	42%	26%	10%	2%	62%	35%
CZ	1091	19%	39%	26%	7%	9%	58%	33%
DK	1003	25%	38%	29%	6%	2%	63%	35%
D-W	1018	24%	35%	19%	14%	7%	59%	34%
DE	1525	22%	34%	21%	16%	6%	56%	37%
D-E	507	15%	29%	29%	23%	4%	44%	52%
EE	1000	18%	25%	23%	10%	22%	44%	34%
EL	1000	49%	33%	13%	5%	0%	82%	17%
ES	1003	22%	42%	10%	7%	19%	64%	17%
FR	1007	29%	33%	18%	8%	11%	62%	26%
IE	1000	20%	30%	21%	9%	20%	50%	30%
IT	1006	28%	45%	10%	5%	12%	72%	15%
CY	503	52%	31%	7%	3%	7%	83%	11%
LV	1015	21%	36%	24%	10%	9%	56%	34%
LT	1000	17%	37%	18%	12%	16%	54%	30%
LU	500	41%	32%	19%	5%	4%	72%	24%
HU	1005	19%	35%	20%	10%	16%	54%	31%
MT	500	34%	35%	10%	3%	17%	70%	14%
NL	1018	15%	27%	33%	19%	5%	42%	52%
AT	1016	24%	48%	16%	4%	8%	72%	20%
PL	1000	16%	44%	17%	5%	18%	60%	22%
PT	995	22%	54%	11%	3%	9%	76%	15%
SI	1031	14%	39%	28%	13%	6%	53%	41%
SK	1023	21%	44%	18%	8%	9%	65%	27%
FI	1000	8%	34%	41%	14%	3%	41%	55%
SE	1013	30%	33%	28%	6%	3%	63%	34%
UK	1308	16%	40%	27%	10%	7%	55%	37%
BG	1035	24%	32%	14%	5%	24%	56%	20%
RO	1047	32%	39%	9%	3%	17%	71%	12%
HR	1000	26%	39%	15%	9%	13%	64%	23%
TR	1005	30%	43%	7%	7%	13%	73%	14%

QC10 Could you tell me to what extent you agree with the following statement: In shops and supermarkets, customers can easily find information on products sourced from animal welfare friendly production systems.

	TOTAL	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK	Agree	Disagree
UE25 EU25	24565	7%	26%	33%	22%	12%	33%	54%
BE	1003	7%	32%	41%	16%	3%	39%	57%
CZ	1091	5%	20%	35%	30%	10%	25%	64%
DK	1003	4%	25%	45%	21%	5%	29%	66%
D-W	1018	6%	15%	38%	31%	9%	22%	70%
DE	1525	6%	17%	39%	30%	8%	23%	69%
D-E	507	5%	24%	41%	25%	4%	29%	67%
EE	1000	5%	13%	25%	34%	23%	18%	59%
EL	1000	7%	21%	39%	31%	1%	29%	70%
ES	1003	4%	17%	34%	21%	24%	21%	55%
FR	1007	9%	28%	30%	20%	13%	37%	50%
IE	1000	10%	31%	21%	14%	24%	41%	35%
IT	1006	13%	39%	24%	13%	10%	52%	38%
CY	503	13%	27%	30%	14%	16%	40%	44%
LV	1015	3%	16%	35%	38%	9%	18%	73%
LT	1000	5%	20%	27%	31%	16%	25%	59%
LU	500	18%	35%	29%	12%	6%	53%	41%
HU	1005	6%	25%	24%	29%	16%	31%	52%
MT	500	9%	20%	25%	23%	24%	29%	48%
NL	1018	9%	29%	37%	17%	7%	39%	54%
AT	1016	13%	43%	26%	9%	9%	56%	35%
PL	1000	4%	20%	28%	33%	16%	23%	61%
PT	995	8%	27%	33%	18%	14%	36%	51%
SI	1031	5%	32%	38%	18%	7%	37%	56%
SK	1023	4%	14%	42%	33%	7%	18%	75%
FI	1000	5%	29%	47%	15%	5%	33%	62%
SE	1013	4%	36%	34%	22%	4%	40%	56%
UK	1308	6%	32%	33%	12%	16%	39%	45%
BG	1035	3%	13%	30%	37%	18%	15%	67%
RO	1047	10%	25%	30%	15%	19%	35%	46%
HR	1000	3%	18%	36%	32%	11%	21%	68%
TR	1005	15%	33%	19%	16%	17%	48%	35%

QC11 Do you think that current labels of food products allow you to identify those products sourced from animal welfare friendly production systems?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	7%	27%	33%	23%	11%	34%	55%
BE	1003	9%	32%	36%	19%	4%	41%	55%
CZ	1091	2%	16%	38%	37%	7%	18%	75%
DK	1003	7%	27%	38%	22%	6%	34%	60%
D-W	1018	5%	19%	39%	30%	7%	24%	69%
DE	1525	6%	20%	39%	30%	6%	25%	69%
D-E	507	7%	24%	39%	28%	3%	30%	66%
EE	1000	4%	13%	26%	35%	23%	16%	61%
EL	1000	8%	19%	41%	31%	1%	27%	72%
ES	1003	6%	17%	33%	21%	22%	23%	54%
FR	1007	8%	28%	29%	24%	11%	36%	53%
IE	1000	11%	31%	21%	14%	23%	41%	35%
IT	1006	10%	39%	26%	15%	10%	48%	41%
CY	503	18%	26%	30%	14%	13%	44%	43%
LV	1015	3%	15%	34%	41%	7%	18%	75%
LT	1000	3%	21%	26%	35%	15%	24%	61%
LU	500	19%	33%	28%	15%	5%	52%	43%
HU	1005	7%	28%	26%	24%	14%	35%	50%
MT	500	7%	28%	29%	20%	16%	35%	49%
NL	1018	14%	35%	29%	16%	6%	49%	45%
AT	1016	13%	43%	30%	9%	5%	56%	39%
PL	1000	3%	18%	30%	33%	16%	21%	63%
PT	995	11%	31%	30%	16%	13%	42%	46%
SI	1031	6%	34%	36%	17%	6%	40%	53%
SK	1023	2%	11%	40%	42%	6%	13%	82%
FI	1000	5%	42%	37%	11%	5%	47%	48%
SE	1013	9%	33%	36%	17%	5%	42%	53%
UK	1308	8%	31%	34%	14%	14%	39%	48%
BG	1035	3%	9%	29%	42%	17%	12%	71%
RO	1047	10%	25%	28%	21%	16%	35%	49%
HR	1000	7%	18%	33%	33%	10%	24%	66%
TR	1005	17%	36%	17%	13%	18%	52%	30%

QC12 Which of the following would be for you the best way to identify the animal welfare\ protection conditions under which food products are sourced? (ROTATE – MAX. 2 ANSWERS)

	TOTAL	Information posters or displays in the shop where you purchase the food	Textual written information labels on the product wrapping	Logos on the product wrapping	Colour coding on the product wrapping	Providing an image of the production system (e.g. laying hens kept in barns or free-range production systems)	Use of a grading or scoring system (e.g. such as five welfare "stars" for the best product, one "star" for the basic product)	Other (SPONTANEOUS)	DK
UE25 EU25	24565	20%	39%	35%	18%	16%	26%	1%	8%
BE	1003	22%	35%	49%	21%	14%	22%	1%	3%
CZ	1091	16%	26%	39%	16%	21%	33%	0%	5%
DK	1003	14%	46%	40%	14%	13%	44%	2%	3%
D-W	1018	20%	50%	43%	22%	9%	22%	1%	5%
DE	1525	20%	51%	44%	22%	9%	21%	1%	5%
D-E	507	18%	55%	46%	22%	8%	17%	1%	2%
EE	1000	19%	23%	28%	26%	22%	16%	1%	18%
EL	1000	28%	59%	23%	19%	23%	26%	1%	2%
ES	1003	26%	39%	18%	12%	10%	20%	1%	19%
FR	1007	23%	39%	35%	13%	20%	32%	1%	7%
IE	1000	39%	27%	24%	22%	17%	31%	0%	13%
IT	1006	15%	42%	28%	13%	22%	31%	1%	8%
CY	503	35%	73%	21%	14%	16%	22%	0%	2%
LV	1015	22%	43%	32%	15%	11%	24%	1%	6%
LT	1000	21%	37%	29%	23%	9%	15%	-	15%
LU	500	27%	51%	24%	9%	15%	32%	1%	3%
HU	1005	17%	40%	28%	16%	19%	18%	1%	12%
MT	500	13%	36%	32%	27%	14%	32%	-	7%
NL	1018	13%	35%	49%	20%	20%	28%	1%	4%
AT	1016	20%	35%	38%	23%	25%	31%	1%	2%
PL	1000	15%	37%	38%	17%	15%	17%	1%	11%
PT	995	22%	46%	31%	20%	27%	21%	0%	7%
SI	1031	20%	46%	26%	17%	14%	35%	2%	3%
SK	1023	19%	31%	37%	30%	16%	40%	0%	3%
FI	1000	11%	45%	40%	17%	24%	31%	3%	2%
SE	1013	39%	56%	40%	5%	12%	31%	0%	2%
UK	1308	17%	19%	40%	32%	17%	27%	0%	11%
BG	1035	18%	44%	29%	23%	10%	27%	1%	11%
RO	1047	28%	53%	9%	14%	16%	31%	1%	14%
HR	1000	12%	45%	40%	9%	22%	19%	1%	7%
TR	1005	33%	49%	21%	6%	19%	13%	0%	16%

QC13 Do you believe that farmers should be financially compensated for any higher production costs linked to farming animals under more welfare-friendly conditions?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	34%	38%	13%	7%	8%	72%	19%
BE	1003	36%	40%	16%	6%	1%	77%	22%
CZ	1091	38%	43%	11%	4%	3%	81%	15%
DK	1003	30%	34%	19%	14%	3%	64%	33%
D-W	1018	41%	31%	13%	8%	6%	73%	21%
DE	1525	42%	31%	13%	8%	6%	74%	20%
D-E	507	47%	32%	11%	7%	3%	78%	18%
EE	1000	51%	32%	4%	1%	12%	83%	5%
EL	1000	65%	29%	3%	2%	1%	94%	5%
ES	1003	29%	37%	9%	4%	22%	66%	12%
FR	1007	30%	38%	16%	9%	7%	69%	25%
IE	1000	31%	37%	9%	10%	13%	68%	19%
IT	1006	17%	44%	17%	11%	11%	61%	28%
CY	503	63%	21%	6%	3%	6%	84%	10%
LV	1015	61%	30%	3%	1%	5%	91%	4%
LT	1000	43%	42%	5%	1%	9%	84%	7%
LU	500	35%	34%	15%	12%	5%	68%	27%
HU	1005	33%	43%	9%	4%	10%	77%	14%
MT	500	55%	36%	4%	1%	4%	91%	5%
NL	1018	45%	31%	12%	9%	3%	76%	21%
AT	1016	36%	45%	10%	4%	5%	81%	14%
PL	1000	34%	46%	10%	4%	6%	80%	14%
PT	995	36%	41%	10%	6%	7%	76%	16%
SI	1031	46%	40%	7%	3%	3%	86%	10%
SK	1023	36%	45%	9%	5%	5%	81%	14%
FI	1000	28%	49%	15%	5%	3%	78%	20%
SE	1013	54%	32%	9%	3%	1%	86%	12%
UK	1308	32%	40%	13%	7%	8%	71%	20%
BG	1035	55%	34%	1%	0%	9%	89%	2%
RO	1047	53%	32%	3%	1%	11%	86%	4%
HR	1000	60%	28%	4%	2%	6%	89%	5%
TR	1005	65%	26%	1%	1%	6%	92%	3%

QC14 Do you believe that imported foods from outside the European Union should respect the same conditions of animal welfare\ protection as those applied in the European Union?

	TOTAL	Yes, certainly	Yes, probably	No, probably not	No, certainly not	DK	Yes	No
UE25 EU25	24565	66%	23%	4%	1%	6%	89%	5%
BE	1003	66%	24%	7%	2%	1%	90%	9%
CZ	1091	66%	27%	3%	1%	3%	93%	4%
DK	1003	77%	14%	5%	1%	2%	92%	6%
D-W	1018	79%	11%	4%	3%	3%	90%	7%
DE	1525	80%	11%	4%	2%	3%	91%	6%
D-E	507	82%	10%	6%	1%	2%	92%	6%
EE	1000	64%	20%	2%	1%	14%	83%	2%
EL	1000	76%	19%	3%	1%	1%	96%	4%
ES	1003	60%	21%	2%	1%	16%	81%	3%
FR	1007	70%	21%	2%	1%	5%	92%	3%
IE	1000	66%	22%	2%	1%	10%	88%	3%
IT	1006	55%	32%	5%	2%	6%	87%	6%
CY	503	94%	5%	0%	-	1%	98%	0%
LV	1015	61%	30%	3%	1%	5%	91%	4%
LT	1000	52%	33%	4%	1%	11%	84%	5%
LU	500	85%	12%	1%	1%	1%	97%	2%
HU	1005	48%	33%	7%	1%	10%	82%	8%
MT	500	68%	24%	0%	0%	8%	92%	0%
NL	1018	78%	14%	3%	2%	3%	92%	5%
AT	1016	53%	27%	12%	6%	3%	79%	18%
PL	1000	46%	44%	3%	1%	6%	90%	4%
PT	995	69%	26%	2%	0%	3%	94%	2%
SI	1031	74%	22%	1%	-	3%	96%	1%
SK	1023	66%	28%	2%	1%	2%	94%	3%
FI	1000	62%	32%	2%	1%	2%	94%	3%
SE	1013	85%	12%	2%	1%	1%	97%	2%
UK	1308	69%	20%	3%	1%	7%	89%	4%
BG	1035	64%	27%	1%	0%	9%	91%	1%
RO	1047	62%	29%	0%	0%	9%	90%	1%
HR	1000	70%	23%	1%	1%	5%	93%	2%
TR	1005	50%	34%	3%	2%	10%	84%	5%

QC15a From the following list, what would be for you the main reasons why you would buy food products produced in a more animal friendly way (e.g. free-range systems)? Firstly?

	TOTAL	They are good value for money	They taste better	They are healthier	They come from happier animals	They come from healthier animals	They are better quality products	They help farmers that treat their animals better	They are better for the environment	They are better for society	None of the above (SPONTANEOUS)	Do not buy these products (SPONTANEOUS)	DK
UE25 EU25	24565	5%	12%	22%	9%	15%	16%	8%	3%	2%	1%	3%	4%
BE	1003	5%	11%	26%	9%	14%	18%	7%	4%	2%	1%	2%	1%
CZ	1091	4%	9%	20%	8%	17%	19%	9%	3%	3%	2%	4%	3%
DK	1003	4%	17%	15%	18%	19%	9%	8%	5%	2%	1%	1%	2%
D-W	1018	2%	8%	21%	11%	17%	21%	11%	3%	2%	1%	1%	2%
DE	1525	2%	8%	21%	11%	17%	21%	11%	2%	2%	1%	1%	2%
D-E	507	4%	10%	19%	9%	17%	22%	12%	2%	2%	1%	0%	2%
EE	1000	5%	9%	24%	10%	11%	7%	13%	4%	3%	1%	4%	10%
EL	1000	8%	8%	45%	2%	17%	14%	2%	2%	1%	1%	2%	-
ES	1003	3%	10%	27%	10%	8%	12%	4%	3%	2%	1%	6%	15%
FR	1007	6%	18%	21%	6%	10%	21%	6%	4%	2%	1%	3%	3%
IE	1000	11%	15%	29%	5%	11%	11%	4%	2%	2%	1%	4%	6%
IT	1006	6%	15%	25%	5%	18%	16%	3%	3%	3%	1%	2%	3%
CY	503	2%	13%	55%	1%	8%	9%	1%	2%	1%	1%	6%	1%
LV	1015	6%	8%	25%	3%	15%	15%	11%	3%	3%	2%	7%	3%
LT	1000	13%	8%	27%	3%	14%	15%	5%	1%	1%	3%	1%	9%
LU	500	10%	19%	31%	9%	9%	13%	4%	2%	0%	0%	1%	1%
HU	1005	8%	17%	14%	2%	20%	20%	6%	2%	1%	2%	3%	5%
MT	500	7%	10%	31%	5%	12%	10%	7%	3%	2%	2%	3%	7%
NL	1018	8%	7%	11%	19%	15%	7%	19%	5%	2%	1%	3%	4%
AT	1016	5%	10%	16%	10%	18%	17%	14%	4%	2%	1%	1%	1%
PL	1000	4%	12%	28%	4%	15%	16%	7%	2%	3%	1%	3%	5%
PT	995	34%	12%	21%	5%	10%	10%	4%	1%	1%	0%	1%	1%
SI	1031	3%	6%	27%	3%	14%	21%	8%	4%	2%	2%	7%	2%
SK	1023	6%	9%	32%	6%	17%	15%	6%	2%	3%	1%	1%	3%
FI	1000	3%	7%	14%	14%	15%	14%	19%	6%	3%	2%	2%	2%
SE	1013	3%	7%	12%	24%	26%	11%	12%	2%	1%	0%	0%	1%
UK	1308	2%	10%	15%	13%	15%	11%	12%	5%	3%	2%	6%	5%
BG	1035	16%	15%	29%	1%	11%	13%	2%	0%	1%	0%	4%	7%
RO	1047	26%	13%	27%	2%	11%	7%	2%	1%	2%	0%	2%	6%
HR	1000	8%	10%	40%	2%	12%	12%	3%	1%	2%	1%	2%	6%
TR	1005	11%	13%	37%	3%	7%	10%	2%	2%	2%	1%	6%	6%

QC15b Secondly?

	TOTAL	They are good value for money	They taste better	They are healthier	They come from happier animals	They come from healthier animals	They are better quality products	They help farmers that treat their animals better	They are better for the environment	They are better for society	None of the above (SPONTANEOUS)	Do not buy these products (SPONTANEOUS)	DK
UE25 EU25	22447	4%	12%	18%	8%	17%	19%	10%	6%	4%	0%	0%	1%
BE	962	6%	13%	19%	8%	16%	18%	10%	7%	3%	0%	0%	0%
CZ	991	4%	11%	20%	7%	16%	21%	9%	5%	3%	1%	0%	2%
DK	960	2%	10%	15%	12%	19%	14%	16%	8%	3%	0%	-	0%
D-W	973	2%	12%	18%	8%	18%	20%	13%	6%	3%	0%	0%	1%
DE	1462	2%	12%	18%	7%	17%	20%	13%	6%	3%	0%	0%	1%
D-E	493	2%	14%	19%	6%	17%	20%	12%	7%	1%	1%	-	1%
EE	856	2%	10%	15%	12%	22%	11%	15%	8%	3%	1%	0%	2%
EL	973	5%	13%	20%	4%	24%	21%	4%	6%	2%	-	-	0%
ES	784	1%	11%	16%	12%	19%	22%	6%	7%	4%	-	-	1%
FR	940	5%	13%	18%	7%	16%	21%	8%	7%	3%	0%	0%	3%
IE	891	4%	20%	19%	8%	15%	17%	8%	6%	2%	-	-	1%
IT	943	8%	14%	22%	6%	15%	16%	8%	4%	6%	0%	0%	1%
CY	467	1%	26%	24%	1%	22%	19%	2%	4%	1%	-	-	-
LV	892	8%	12%	22%	5%	14%	22%	6%	6%	3%	-	0%	1%
LT	861	12%	17%	22%	4%	14%	19%	3%	2%	4%	0%	0%	3%
LU	489	3%	14%	22%	9%	18%	21%	8%	4%	1%	-	-	-
HU	906	10%	14%	15%	4%	19%	23%	7%	4%	2%	0%	-	1%
MT	435	6%	10%	20%	7%	17%	16%	9%	9%	4%	-	0%	2%
NL	942	7%	8%	11%	14%	17%	11%	15%	9%	4%	-	-	3%
AT	989	6%	13%	17%	10%	17%	15%	11%	5%	4%	-	0%	0%
PL	915	4%	12%	25%	5%	16%	20%	7%	4%	4%	-	-	3%
PT	964	16%	14%	20%	7%	15%	17%	5%	3%	2%	0%	0%	0%
SI	919	4%	15%	21%	4%	17%	20%	9%	5%	3%	1%	0%	1%
SK	973	3%	11%	20%	7%	18%	23%	8%	5%	3%	0%	0%	1%
FI	941	3%	6%	13%	13%	20%	17%	17%	6%	3%	1%	0%	1%
SE	1003	4%	6%	8%	11%	24%	17%	17%	8%	3%	-	-	0%
UK	1126	3%	12%	14%	10%	18%	17%	12%	7%	6%	-	-	2%
BG	915	9%	21%	23%	2%	17%	19%	3%	2%	1%	0%	-	1%
RO	956	12%	21%	19%	6%	19%	13%	4%	2%	2%	-	-	2%
HR	911	5%	17%	19%	3%	19%	23%	7%	4%	2%	1%	-	-
TR	878	6%	15%	17%	6%	16%	26%	4%	4%	4%	0%	-	-

QC15c Thirdly?

	TOTAL	They are good value for money	They taste better	They are healthier	They come from happier animals	They come from healthier animals	They are better quality products	They help farmers that treat their animals better	They are better for the environment	They are better for society	None of the above (SPONTANEO US)	Do not buy these products (SPONTANEO US)	DK
UE25 EU25	22056	5%	12%	14%	8%	14%	17%	11%	9%	6%	0%	0%	3%
BE	959	6%	11%	14%	8%	13%	18%	12%	11%	6%	1%	0%	1%
CZ	960	6%	12%	16%	8%	14%	17%	11%	7%	4%	1%	-	4%
DK	955	3%	11%	10%	6%	11%	18%	16%	15%	8%	0%	-	1%
D-W	964	2%	12%	14%	9%	18%	18%	13%	7%	4%	0%	0%	2%
DE	1447	2%	13%	14%	9%	18%	18%	13%	7%	4%	1%	0%	1%
D-E	486	4%	13%	16%	9%	14%	19%	11%	7%	5%	1%	-	1%
EE	829	5%	8%	10%	9%	13%	15%	16%	14%	6%	1%	-	4%
EL	968	12%	17%	13%	3%	13%	20%	6%	9%	7%	-	-	1%
ES	774	2%	13%	13%	10%	11%	20%	9%	10%	9%	1%	-	3%
FR	907	6%	13%	14%	6%	11%	14%	12%	11%	4%	0%	0%	8%
IE	885	9%	13%	11%	4%	10%	16%	11%	14%	7%	0%	-	5%
IT	930	6%	14%	15%	7%	16%	17%	8%	9%	6%	1%	-	2%
CY	467	4%	18%	8%	3%	16%	24%	6%	13%	7%	-	-	0%
LV	883	9%	12%	18%	4%	11%	20%	10%	6%	6%	0%	-	3%
LT	834	14%	14%	17%	5%	14%	17%	8%	5%	3%	1%	-	2%
LU	489	5%	13%	11%	6%	13%	23%	11%	10%	5%	-	-	2%
HU	897	11%	14%	15%	2%	15%	18%	12%	7%	2%	1%	-	3%
MT	425	12%	10%	10%	4%	13%	18%	14%	6%	10%	0%	-	2%
NL	912	6%	9%	11%	9%	15%	14%	13%	10%	7%	-	-	6%
AT	984	7%	12%	14%	11%	15%	16%	11%	7%	5%	0%	0%	1%
PL	891	7%	14%	15%	7%	12%	17%	10%	8%	6%	-	-	3%
PT	960	18%	10%	17%	8%	13%	16%	9%	5%	4%	1%	0%	0%
SI	899	10%	12%	16%	4%	12%	15%	8%	7%	7%	5%	-	4%
SK	965	8%	13%	13%	4%	13%	20%	9%	8%	10%	0%	0%	2%
FI	923	6%	10%	12%	9%	16%	13%	12%	11%	7%	1%	-	2%
SE	999	5%	8%	10%	9%	12%	14%	18%	14%	7%	0%	-	1%
UK	1102	3%	10%	11%	9%	13%	15%	13%	12%	7%	-	-	6%
BG	903	13%	16%	13%	2%	12%	22%	6%	6%	8%	1%	-	2%
RO	940	14%	15%	14%	6%	13%	15%	6%	5%	7%	0%	-	4%
HR	902	10%	16%	11%	3%	12%	18%	11%	8%	7%	3%	-	-
TR	874	8%	9%	9%	5%	12%	19%	6%	16%	13%	1%	-	-

QC15 - Main reasons - TOTAL

	TOTAL	They are good value for money	They taste better	They are healthier	They come from happier animals	They come from healthier animals	They are better quality products	They help farmers that treat their animals better	They are better for the environment	They are better for society	None of the above (SPONTANEOUS)	Do not buy these products (SPONTANEOUS)	DK
UE25 EU25	24565	14%	34%	51%	23%	43%	48%	27%	17%	11%	2%	3%	4%
BE	1003	16%	35%	57%	24%	42%	51%	27%	21%	11%	2%	2%	1%
CZ	1091	13%	30%	52%	22%	44%	53%	27%	14%	9%	4%	5%	3%
DK	1003	9%	37%	38%	35%	48%	40%	38%	27%	13%	2%	1%	2%
D-W	1018	6%	31%	52%	26%	52%	57%	35%	15%	9%	2%	1%	2%
DE	1525	6%	32%	52%	26%	51%	58%	35%	15%	9%	2%	1%	2%
D-E	507	10%	36%	52%	23%	47%	61%	34%	16%	8%	2%	0%	2%
EE	1000	11%	24%	45%	28%	40%	28%	39%	23%	10%	2%	4%	10%
EL	1000	24%	37%	78%	8%	52%	53%	12%	16%	9%	1%	2%	-
ES	1003	5%	28%	50%	27%	31%	44%	15%	17%	12%	1%	6%	15%
FR	1007	16%	41%	50%	17%	35%	53%	25%	19%	8%	2%	3%	3%
IE	1000	22%	44%	56%	16%	33%	40%	21%	19%	10%	1%	4%	6%
IT	1006	18%	40%	61%	17%	47%	47%	18%	15%	13%	2%	2%	3%
CY	503	7%	54%	84%	5%	44%	50%	8%	18%	8%	1%	6%	1%
LV	1015	21%	29%	60%	11%	37%	52%	25%	14%	11%	2%	7%	3%
LT	1000	34%	34%	61%	10%	37%	45%	13%	7%	7%	5%	1%	9%
LU	500	17%	46%	64%	24%	40%	56%	23%	16%	6%	0%	1%	1%
HU	1005	27%	43%	41%	7%	50%	56%	23%	11%	5%	3%	3%	5%
MT	500	22%	28%	57%	14%	38%	39%	27%	16%	14%	3%	3%	7%
NL	1018	19%	22%	31%	40%	44%	31%	44%	23%	12%	1%	3%	4%
AT	1016	18%	35%	46%	32%	49%	47%	35%	16%	11%	1%	1%	1%
PL	1000	14%	35%	63%	16%	41%	50%	22%	14%	11%	1%	3%	5%
PT	995	67%	36%	57%	20%	37%	41%	18%	8%	6%	1%	2%	1%
SI	1031	16%	30%	60%	10%	40%	52%	23%	14%	11%	7%	7%	2%
SK	1023	16%	31%	64%	17%	47%	55%	22%	15%	15%	1%	1%	3%
FI	1000	11%	23%	36%	34%	49%	42%	47%	22%	13%	4%	2%	2%
SE	1013	13%	21%	29%	43%	62%	43%	47%	25%	11%	0%	0%	1%
UK	1308	7%	28%	36%	30%	42%	38%	33%	21%	15%	2%	6%	5%
BG	1035	35%	47%	61%	4%	37%	49%	10%	8%	9%	1%	4%	7%
RO	1047	50%	46%	57%	12%	41%	33%	11%	8%	10%	1%	2%	6%
HR	1000	22%	40%	68%	8%	40%	50%	19%	12%	10%	4%	2%	6%
TR	1005	23%	35%	60%	13%	32%	49%	11%	20%	17%	3%	6%	6%