

INFORMATION SHEET 2 – CONSUMER PERCEPTION OF BROILER CHICKEN PRODUCTION

CONSUMER ATTITUDES TO FARM ANIMAL WELFARE

Consumers are increasingly concerned about how their food is produced and the welfare of the animals involved. Studies across the EU, North America, Latin America, Asia and Australia indicate that animal welfare concerns have become more important to consumers over the past two decades¹. The vast majority (94%) of EU citizens believe it is important to protect the welfare of farmed animals, eight in ten (82%) believe the welfare of farmed animals should be better protected than it is now, and six in ten (59%) are willing to pay more for products from animal welfare-friendly production systems². Two thirds (66%) of British consumers consider animal welfare standards in their dietary choices³. A large majority (86%) of American consumers report purchasing at least one product with a welfare-related label in the past 12 months⁴ and more than half (57%) say they would be likely to choose a restaurant because it serves welfare-certified animal products⁵.

CONSUMER ATTITUDES TO BROILER CHICKEN WELFARE AND PRODUCTION SYSTEMS

Consumers consistently show a high level of concern for broiler chicken welfare⁶⁻¹². Surveys of attitudes to animal welfare across 14 countries found that a substantial majority of adults surveyed in all countries agree that chickens can feel pain, can experience emotion, and need room to explore and exercise (Figure 1)⁷. Focus groups in Denmark, France, the Netherlands and the UK indicate that *“modern poultry husbandry is widely unaccepted among consumers and that the demand for an improvement of husbandry conditions is apparent”*⁶. In the US, 78% of consumers are concerned about the way chickens are raised¹³. Two-thirds (65.8%) of Chinese consumers support the establishment of mandatory laws for animal welfare to improve living conditions for chickens¹⁴.

Consumers' main concerns regarding broiler chicken welfare relate to living conditions,^{6,8} including outdoor access^{6,8,15-18} and space allowance^{6,7,15,16}, the possibility to carry out species-appropriate behaviour¹⁶, and humane transport¹⁷, and slaughter methods^{6,17}.

Market-driven initiatives, whereby consumers pay a premium for products that meet higher welfare standards and carry a particular label, or where a retailer or foodservice company specifies higher welfare standards for its products, can have a strong impact on improving broiler chicken welfare¹⁹.

In focus groups carried out in Denmark, France, the Netherlands and the UK, animal welfare was, besides quality, among the most frequently mentioned purchase criteria for poultry meat in every study country⁶. Motivation to purchase higher-welfare chicken is influenced by consumer perceptions that animal welfare is positively related to product quality^{6,20}, taste^{6,18,20,21}, and safety^{22,23}.

A substantial majority of British adults surveyed associate the terms 'free range' (87%) and 'organic' (71%) with higher animal welfare standards²⁴. 'Free range' claims were the most appealing of a range of sustainability claims (including an EU animal welfare label and various organic labels and carbon footprint claims) on chicken breast for Belgian consumers, liked by more than nine in ten consumers (with the most appealing being 'traditional free range', liked by 97% of consumers)²⁵. Perceived benefits of organic production may influence consumer preferences for organic chicken more than the sensory properties of the product²⁶. Providing information regarding organic farming techniques (corresponding to high levels of animal welfare and product safety, and low impact on the environment) significantly increased liking scores for organic chicken breast meat relative to blind tasting among Italian consumers²⁶.

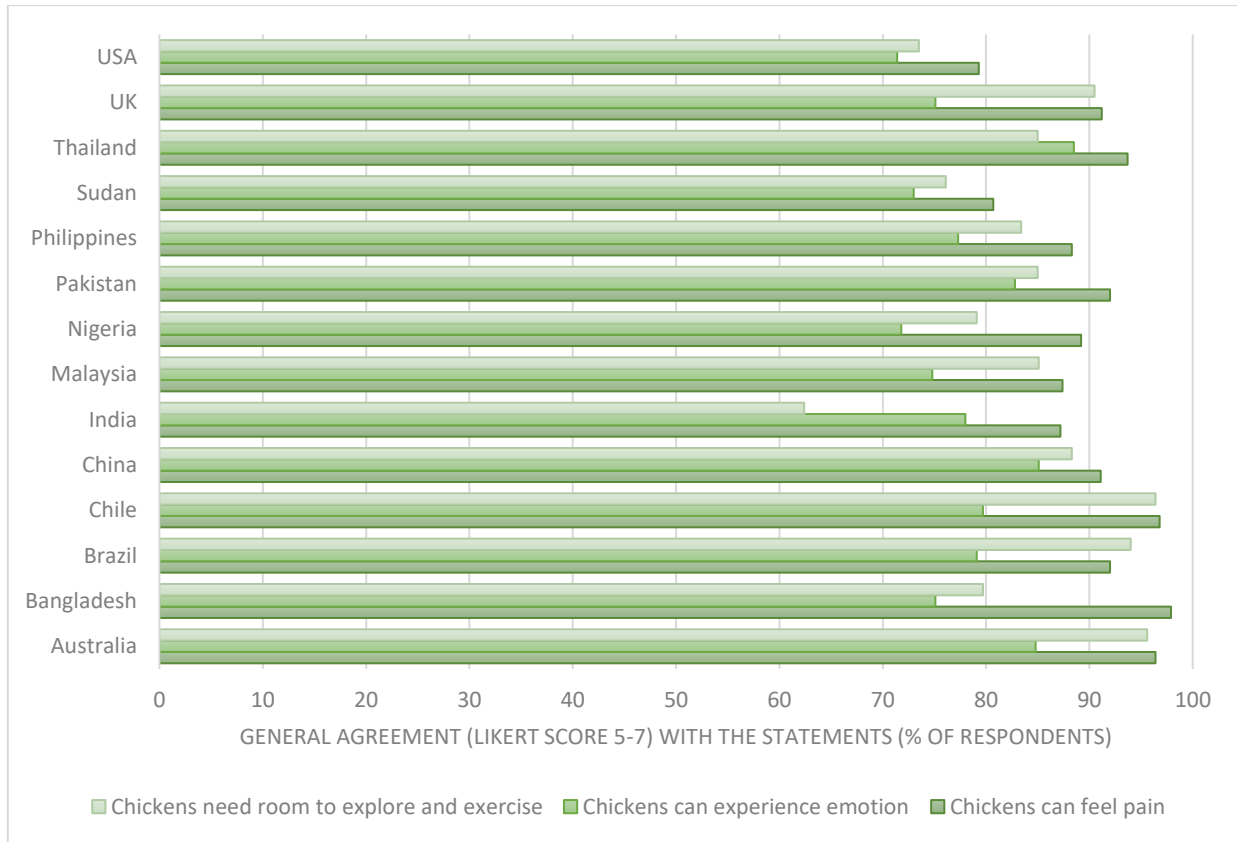


Figure 1. General agreement (proportion of respondents with Likert scores 5 somewhat agree + 6 agree + 7 strongly agree) with the statements ‘Chickens can feel pain’, ‘Chickens can experience emotion’ and ‘Chickens need room to explore and exercise’ in 14 countries. Source: Sinclair et al. (2022)⁷.

Compared with chicken meat produced in conventional highly intensive production systems, many consumers are willing to pay more for chicken meat from higher welfare systems, including indoor systems with more space and enrichment, free-range and organic systems. Consumers in Denmark, France, the Netherlands and the UK are generally willing to pay between 5% and 30% more, with some consumers willing to pay 50-100% more for chicken breast produced to higher welfare standards (Table 1)⁶. Belgium consumers were willing to pay 43% more for chicken breast labelled as ‘free range’, 50% more for ‘traditional free range’, and 63% more for ‘free range total freedom’²⁵. US consumers were willing to pay a 48% premium for chicken breast with a trustworthy welfare certification⁵. Urban consumers in Kenya were willing to pay a premium of 72% for chicken with animal welfare labelling²⁷.

Clear labelling is an important support mechanism for legislative and market reform on farm animal welfare. It enables consumers to make informed choices and provides producers with the means to clearly differentiate higher welfare products in the marketplace. Inadequate labelling can be a barrier to ethical purchasing and consumer choice. 85% of US consumers are concerned about confusing/misleading packaging and label claims when purchasing chicken¹³. Consumers support method of production labelling of meat products to indicate how the animal was reared^{23,24,28,29}. Providing details of animal rearing conditions on the label increases consumer purchasing intention for higher welfare chicken breast fillets⁹.

Table 1. Key findings on consumer attitudes to broiler chicken welfare in selected countries.

	<p>91.7% of adults surveyed in the UK agree that chickens can feel pain, 75.1% agree that they experience emotion, and 90.5% agree that they need room to explore and exercise⁷.</p> <p>Among British focus group respondents, many participants said they would be willing to pay a premium of between 5% and 20% for chicken breast meat produced under higher welfare standards than conventional husbandry, with many willing to pay over 30% more and some up to around 65% extra⁶.</p>
	<p>Most French focus group respondents said that they would pay a surcharge of between 20% and 30% for chicken breast meat produced under higher animal welfare standards than conventional husbandry, with a few claiming that they would pay up to 50% more⁶.</p>
	<p>87.5% of respondents in a Dutch study had a willingness to pay (WTP) that exceeded the price difference between a chicken with a higher level of animal welfare (one-star Beter Leven chicken) and a regular chicken³⁰. The vast majority of Dutch focus group participants stated they were willing to pay between 20% and 30% more for chicken breast meat produced under higher welfare standards than conventional husbandry, with some saying they would pay up to 75% or even 100% extra⁶.</p>
	<p>91.1% of adults surveyed in China agree that chickens can feel pain, 85.1% agree that they can experience emotion, and 88.3% agree that they need room to explore and exercise⁷.</p> <p>Two-thirds (65.8%) of Chinese consumers support the establishment of mandatory laws for animal welfare to improve living conditions for chickens¹⁴.</p>
	<p>93.7% of adults surveyed in Thailand agree that chickens can feel pain, 88.5% agree that they can experience emotion, and 85.0% agree that they need room to explore and exercise⁷.</p>
	<p>92% of adults surveyed in Brazil agree that chickens can feel pain, 79.1% agree that they can experience emotion, and 94% agree that they need room to explore and exercise⁷.</p> <p>100% of Brazilian consumers surveyed agree that it is important to inform on the packaging whether chickens were raised in compliance with animal welfare standards, seven in ten (72.4%) would prefer to consume chicken that meets animal welfare standards, but a similar proportion (69.4%) think it is difficult to find brands that inform whether the chicken breeding met animal welfare standards²¹.</p>
	<p>79.3% of adults surveyed in the USA agree that chickens can feel pain, 71.4% agree that they can experience emotion, and 73.5% agree that they need room to explore and exercise⁷. 78% of US consumers are concerned about the way chickens are raised¹³.</p> <p>US consumers were willing to pay a 48% premium for chicken breast with a trustworthy welfare certification⁵ but 85% of US consumers are concerned about confusing/misleading packaging and label claims when purchasing chicken¹³.</p>
	<p>96.4% of adults surveyed in Australia agree that chickens can feel pain, 84.8% agree that they can experience emotion, and 95.6% agree that they need room to explore and exercise⁷.</p> <p>83.3% of Australians agree that food must be produced from chickens that have been treated humanely, half (49.3%) think that the welfare of the chicken is more important than the cost, 62.6% think the rearing system on the product label is important when purchasing chicken and 42.1% state that they are most likely to buy free-range chicken²³.</p>

CONSUMER ATTITUDES TO BREEDING AND GENETICS

When purchasing meat from a supermarket, a majority of UK adults surveyed consider it important that the chicken was not prone to disease, did not have health issues due to breeding (e.g. unable to walk), and could access its food¹⁵. Seven in ten (72%) of those surveyed agreed that, when buying chicken, people should know whether the chicken had a healthy life¹⁵. In the US, 78% of consumers

are concerned about how chickens are bred to optimise meat production, and 61% are concerned about the length of time it takes to rear a chicken¹³. When presented with a pairwise choice between standard chicken and slower-growth chicken priced at US\$ 0.72 / lb premium (an estimated extra cost of slower growth at 2017 prices), 37% of US consumers chose the slower-growth chicken, increasing to 48% when provided with additional positive information about slower-growth chicken³¹.

Consumers in Asia and Africa often show a strong preference for chicken from slower-growing local breeds, including in China³², Korea³³, Sri Lanka³⁴, India³⁵, and Kenya³⁶. These chickens are also often raised in free-range or less intensive conditions. Consumers prefer the sensory attributes of native breed chicken over commercial broiler chicken and are willing to pay a price premium (e.g. 23% more in Kenya³⁶). Providing consumers with information about native breeds further increases satisfaction, purchase intention and willingness to pay (WTP)³³.

CONSUMER ATTITUDES TO ANTIBIOTIC USE IN CHICKEN PRODUCTION

In the US, 87% of consumers are concerned about antibiotic use in chickens¹³. Half of Chinese consumers are concerned about overuse of antibiotics in chickens and 72.9% think that the rearing conditions for chickens should be improved for the sake of food safety¹⁴. More than half (52%) of Iranian consumers purchase antibiotic-free chicken often, with a further quarter (26%) purchasing it sometime³⁷. Canadian consumers were willing to pay 48% more for chicken raised without antibiotics and 35% more for chicken raised with responsible antibiotic use³⁸. Urban consumers in Kenya were willing to pay a premium of 236% for chicken produced without antibiotics or growth hormones²⁷. Consumers in Ghana demonstrated a higher WTP for chicken produced without antibiotics or growth hormones than for other attributes (including fresh/chilled, domestic production, and cut)³⁹.

CONSUMER ATTITUDES TO HANDLING AND SLAUGHTER

When purchasing meat from a supermarket, six in ten UK consumers consider it important that the animals were handled well (raised with care, when being transported, etc) and the slaughter methods were as humane as possible¹⁵. A majority (53.8%) of Australians think it is unacceptable if 1% of birds do not get adequately stunned at the abattoir, and 58.2% think it is unacceptable to kill conscious chickens for religious reasons²⁵. Urban consumers in Kenya were willing to pay a premium of 30% for use of certified transport, and 135% for humane slaughter of chickens²⁹.

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