

Public attitudes towards aquatic animal welfare

Survey prepared for:



September 2024

1. Background & research design



Research design & sample

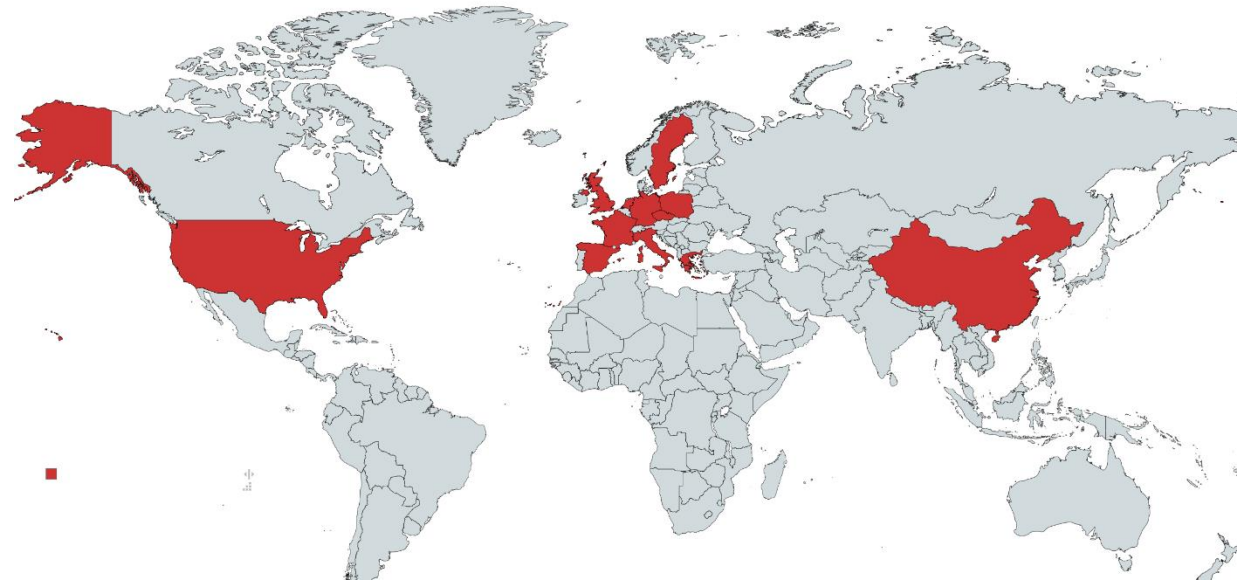
To answer the research questions, an **online survey** of ± 12 minutes was designed, which 12 301 respondents from 12 different countries completed. The fieldwork ran from March 20th to April 5th 2024.

Data were weighted in each country to be nationally representative by age, gender and region.

This report highlights the results from the 9 **EU countries**.



Please note that due to rounding, percentages on some graphs may add up to 101%, and the top-2 scores may differ by 1% from the actual underlying scores.



The 12 countries included: China, Czech Republic, France, Germany, Greece, Italy, Poland, Spain, Sweden, The Netherlands, United Kingdom, USA

Questionnaire

The questionnaire consisted of the following **topics**:

- Background
- Attitudes Towards Animals
- Importance & Awareness of Aquatic Animal Welfare
- Consumption Habits & Behaviour
- Welfare Labelling
- Socio demo & Profiling



2. Results

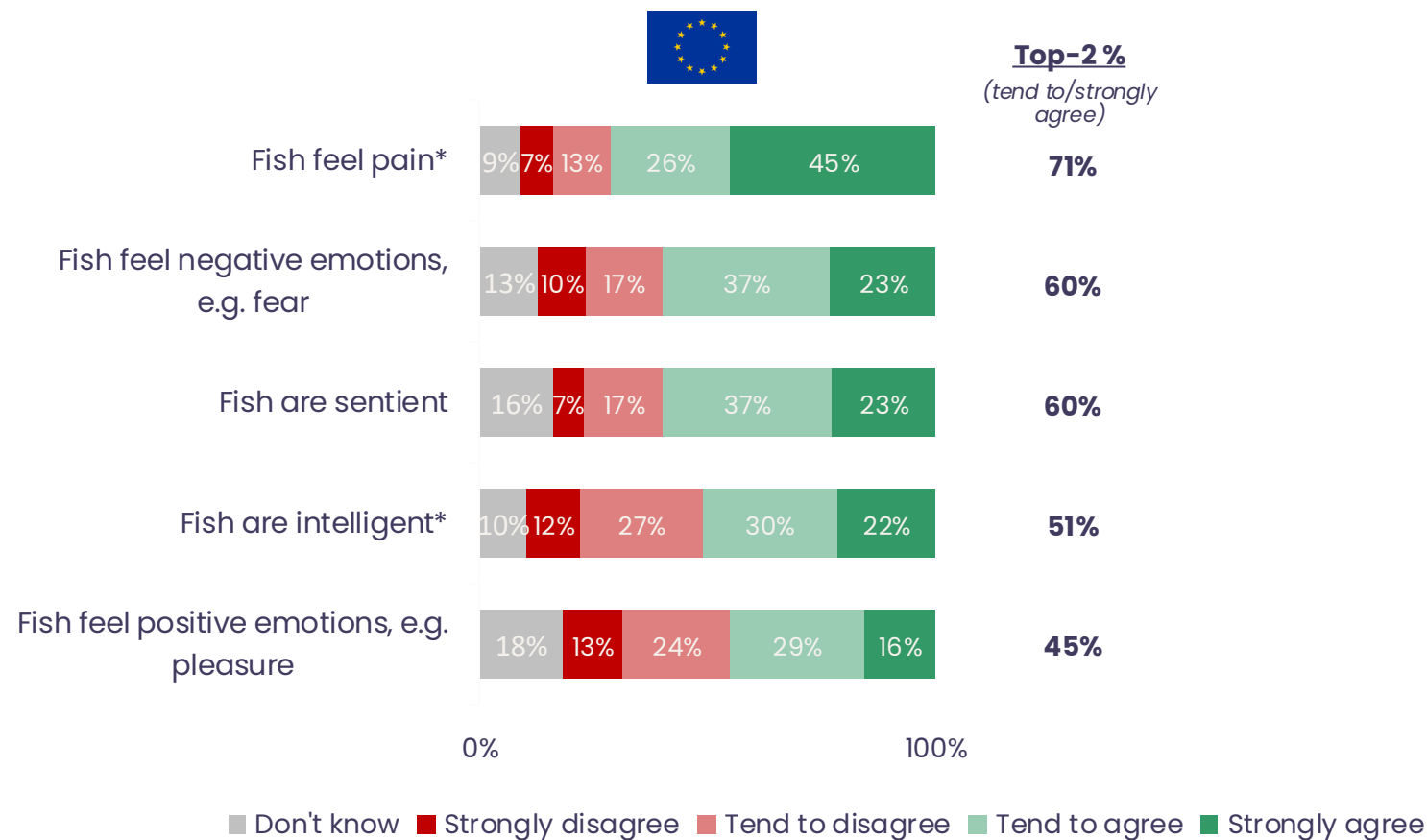




2.1 Attitudes Towards Animals

Most people agree that fish can feel pain. There is more doubt on the emotional/intelligence statements, though the trend is positive.

“Q5. To what extent do you agree or disagree with each of the following statements?”



- Explicit association scores are generally a bit higher in France, Germany, Greece, Italy and Poland, but lower in Spain, Sweden & The Netherlands.
- Associations of women and 18- to 34yo are a bit more positive than the other gender/age groups.

Base: total sample (EU countries: n=9197)

* This statement was negated in the questionnaire (i.e. 'Fish do not feel pain'/'Fish are not intelligent'). For the sake of uniform interpretation, the statement is reversed here in the report.

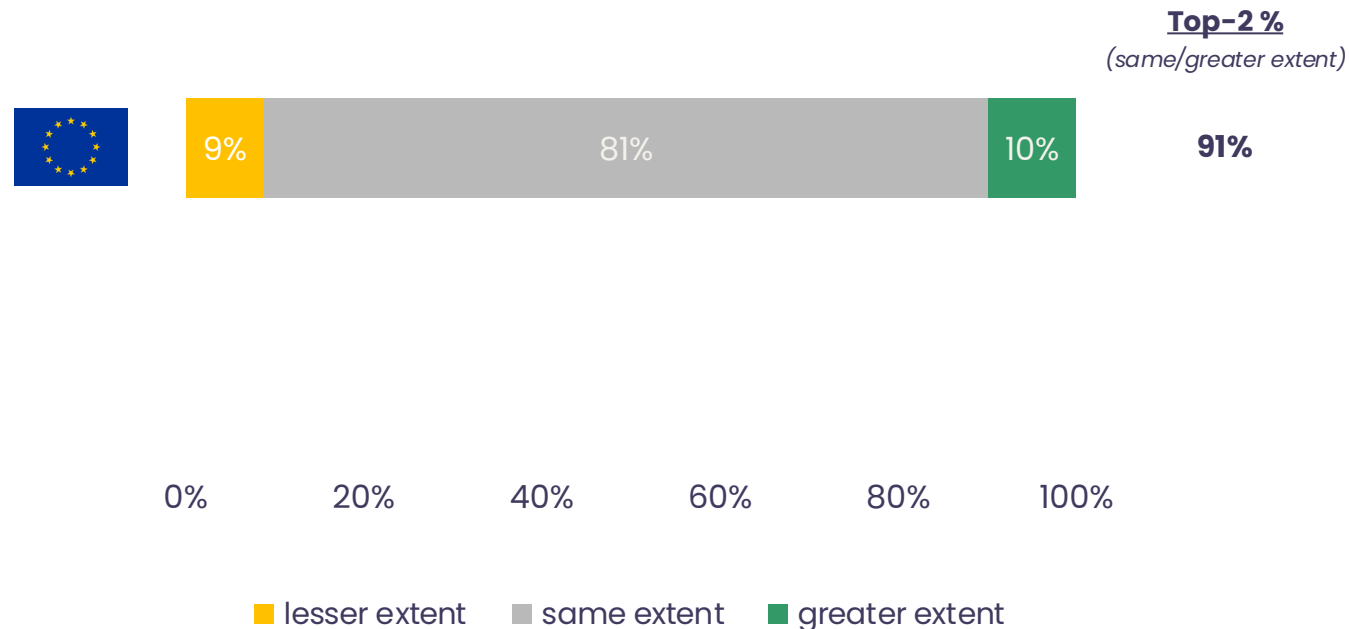


2.2 Importance & Awareness of Aquatic Animal Welfare

Most people believe we should protect the welfare of fish just like we do for other animals we eat.

"Q4. Which of the following comes closest to your view?"

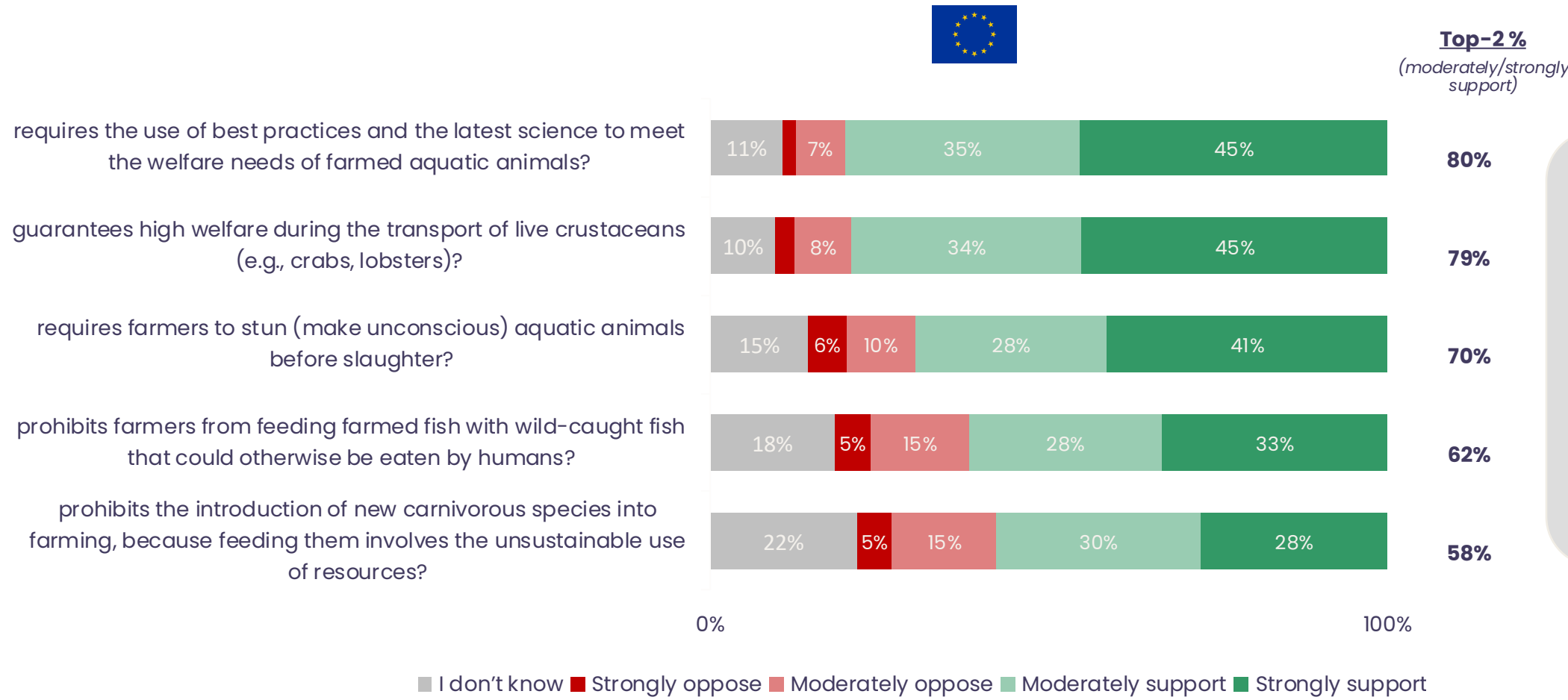
The welfare of fish should be protected to a greater/a lesser/the same extent than the welfare of other animals we eat."



- The top-2 score is a bit higher among women (93%, vs. 89% among men).
- The same goes for +55yo (93%), compared to 35-54yo (92%) and 18-34yo (88%).
- Finally, the top-2 score is higher in France, Greece and Italy (all 94%), but lower in Germany (89%), Poland (89%) & Sweden (85%).

This conviction drives widespread advocacy for enacting stricter legislation regarding the welfare of aquatic animals.

“Q7. Would you support or oppose legislation that...”



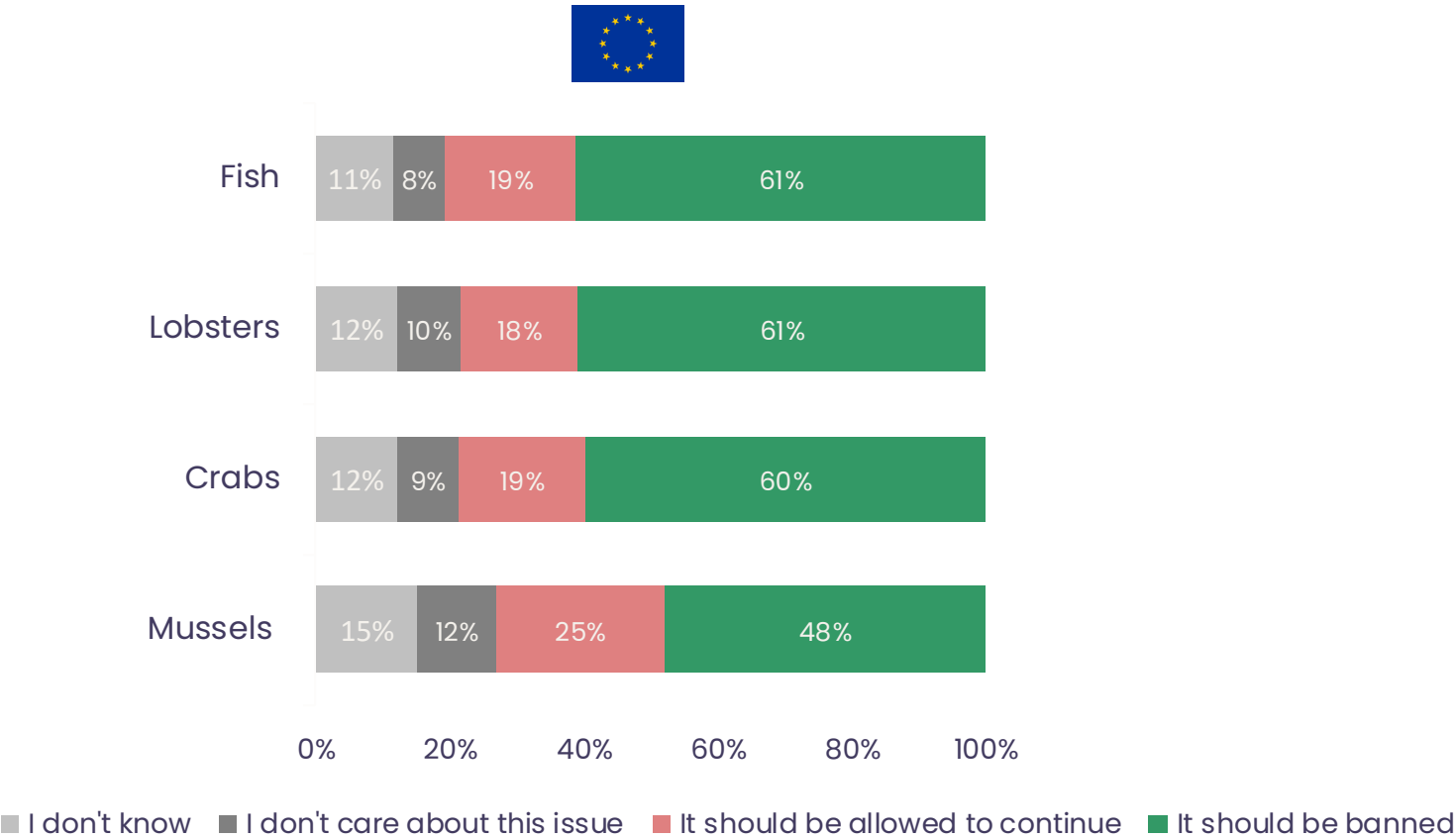
• Generally, support seems to be stronger in France and Italy, while Czech Republic, Sweden & The Netherlands score lower.

• There are no consistent gender or age differences.

Base: total sample (EU countries: n=9197)

In addition, a majority of citizens harbor the opinion that live sales of aquatic animals to consumers should be banned. However, their concern varies slightly between mussels and other aquatic species.

“Q8. Aquatic animals are sometimes sold alive to the final consumer. [...] Please indicate which statement you agree with regarding the live sale of the following aquatic animals to consumers.”

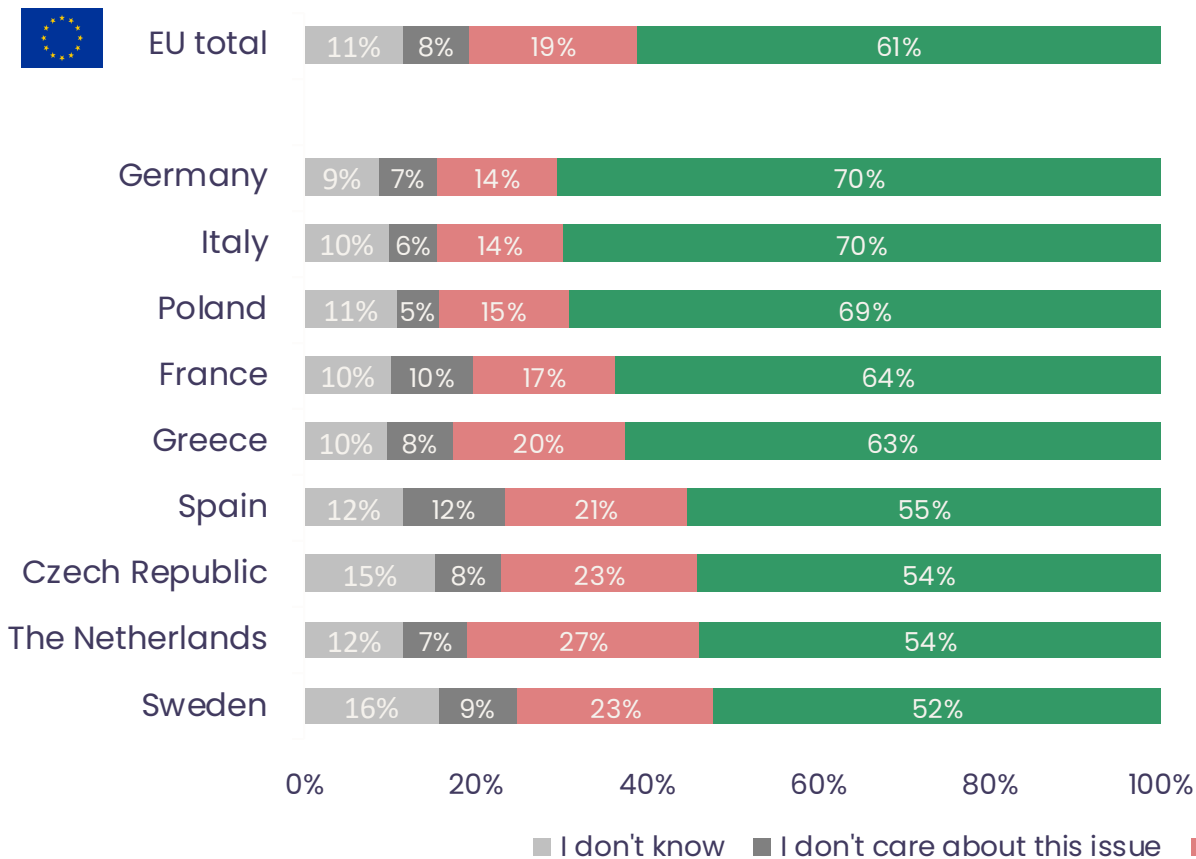


Base: total sample (EU countries: n=9197)

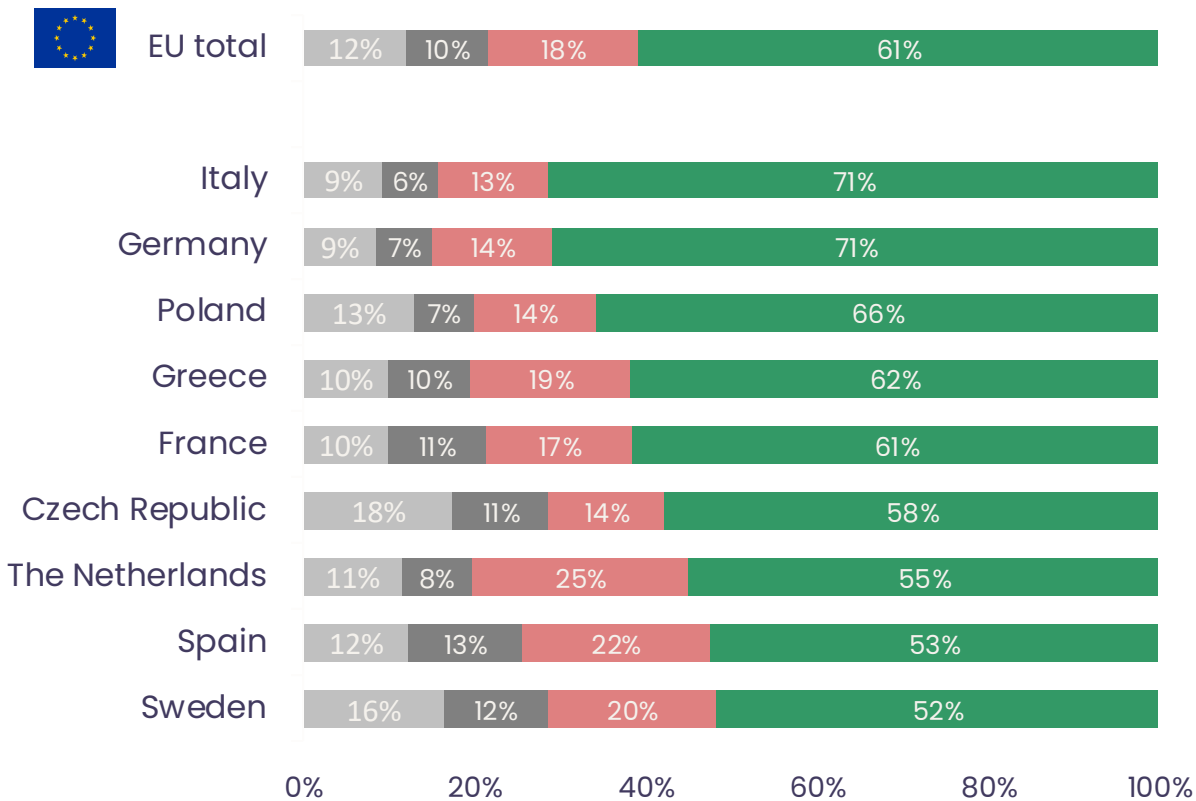
The support for a ban on the live sale of fish and lobsters is highest in Germany, Italy, Poland, France and Greece.

“Q8. Aquatic animals are sometimes sold alive to the final consumer. [...] Please indicate which statement you agree with regarding the live sale of the following aquatic animals to consumers.”

FISH



LOBSTERS

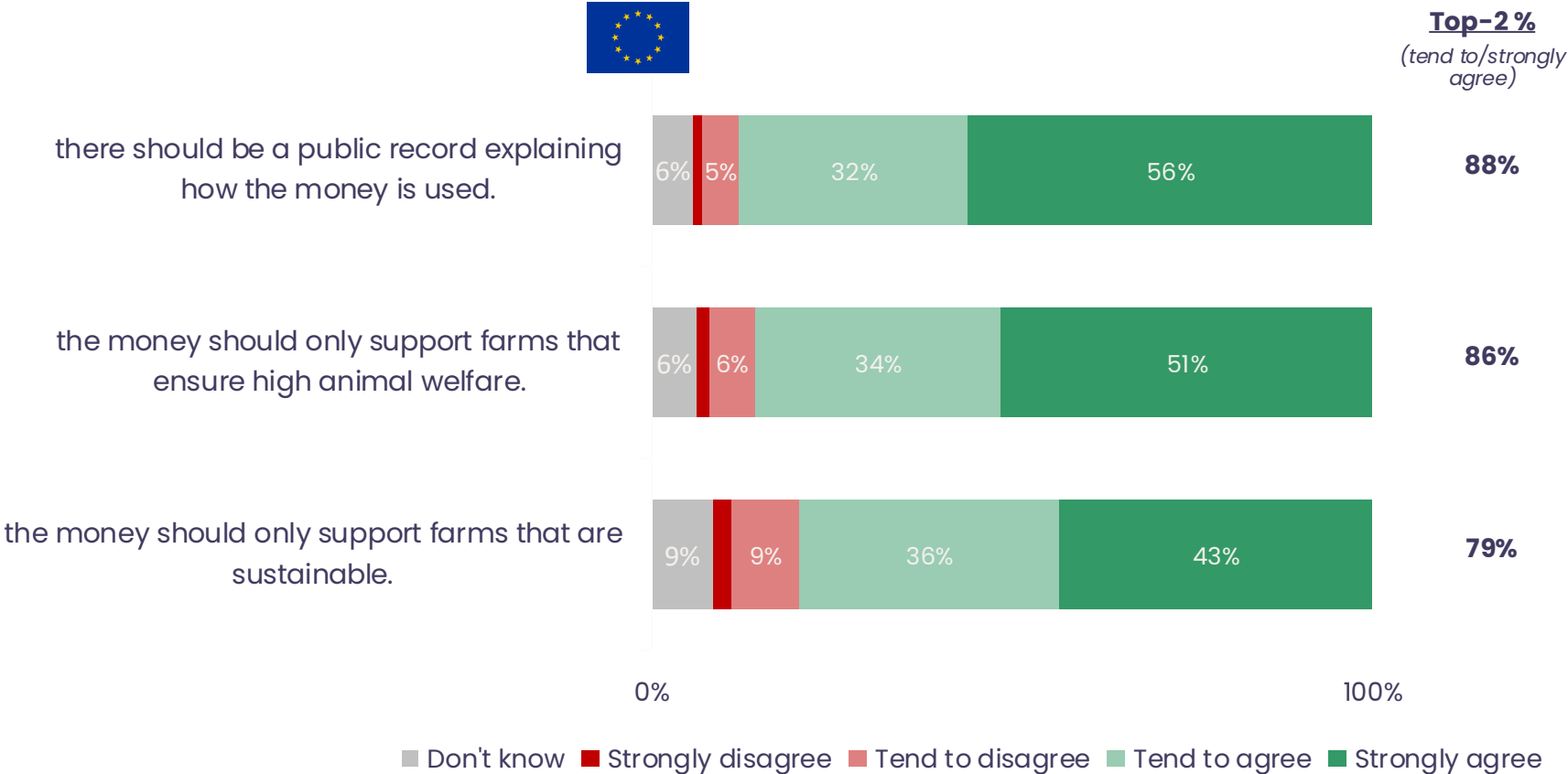


Base: total sample EU countries (n=9197)

Finally, citizens also expect public funds to be allocated transparently, prioritizing farms that uphold high animal welfare and sustainability standards.

“Q9. To what extent do you agree or disagree with each of the following statements?”

When public money is used to fund aquaculture... ”



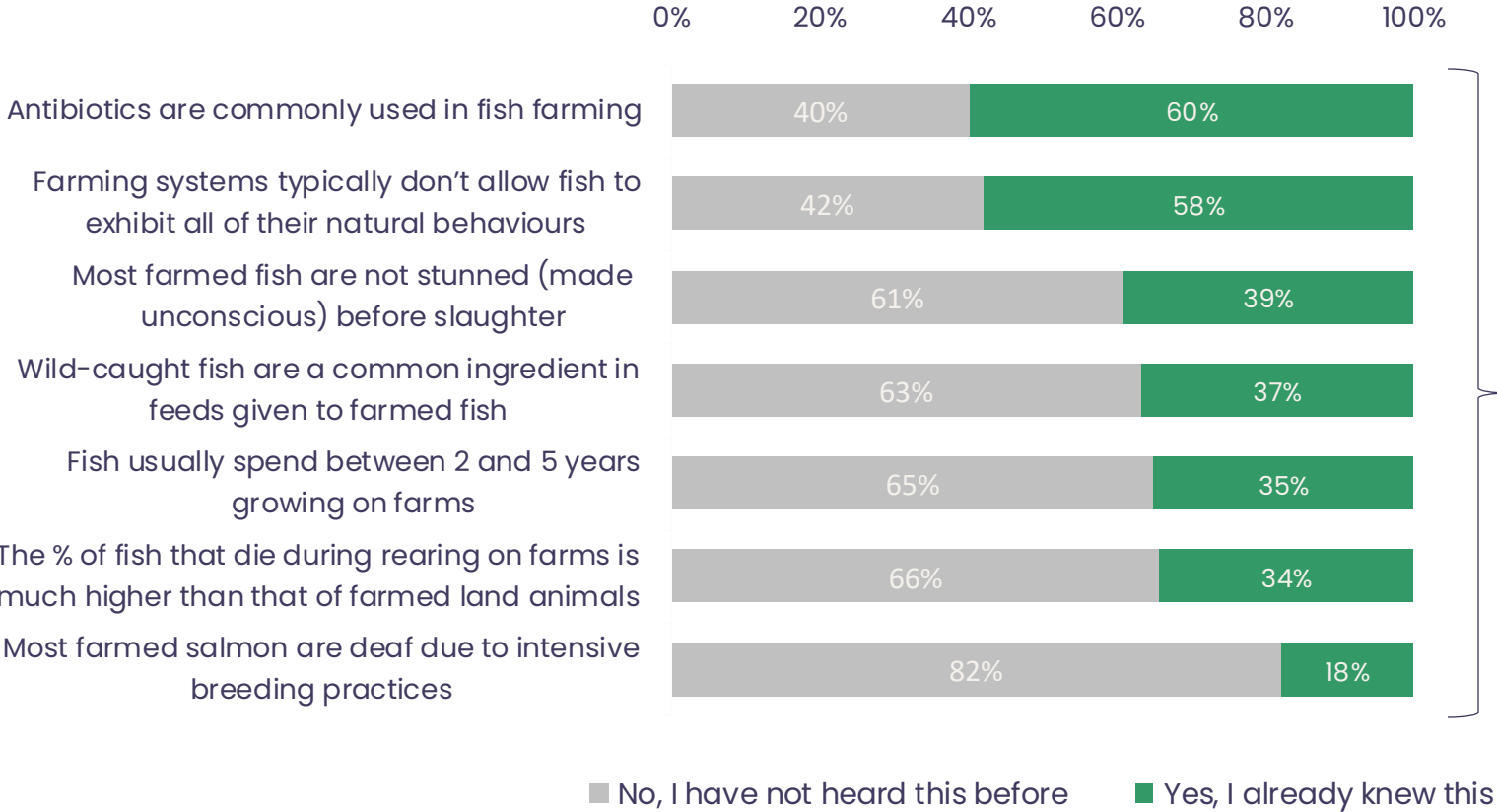
- The demand for directing public funds exclusively towards farms guaranteeing high standards of animal welfare is particularly pronounced in France, Germany and Italy. Czech Republic, Poland, Sweden & The Netherlands score somewhat lower.
- +55yo find this more important as well.

Base: total sample (EU countries: n=9197)

There is a notable lack of awareness regarding fish farming practices, with nearly 50% indicating familiarity with max. 2 statements on the subject.

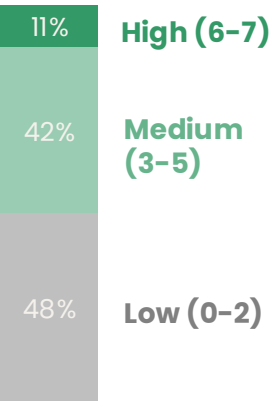


"Q6. Below you can find some statements concerning fish farming. In each case, please indicate whether you were aware of this information or not."



Total awareness score (/7)

avg. 2.8



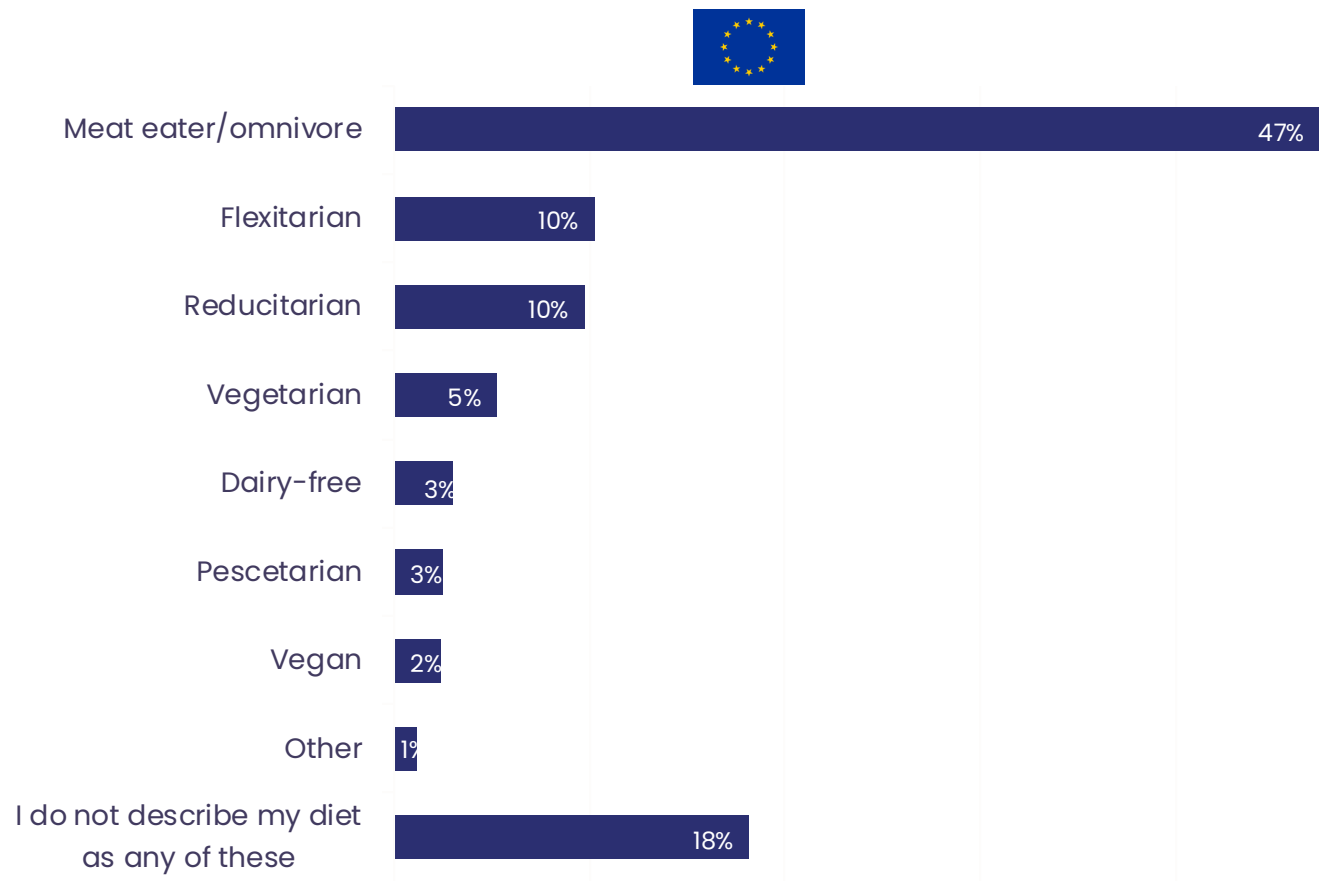
- Average awareness is higher in France (3.2), Poland (3.2) and Germany (3.0), but lower in Spain (2.2), Czech Republic (2.5) and The Netherlands (2.7).
- Awareness of men (3.0) is higher than of women (2.7). Younger age groups also score better.



2.3 Consumption Habits & Behaviour

Roughly 50% of the EU population identifies as meat eaters ...

“Q10. Which of the following terms do you use to describe your diet?”

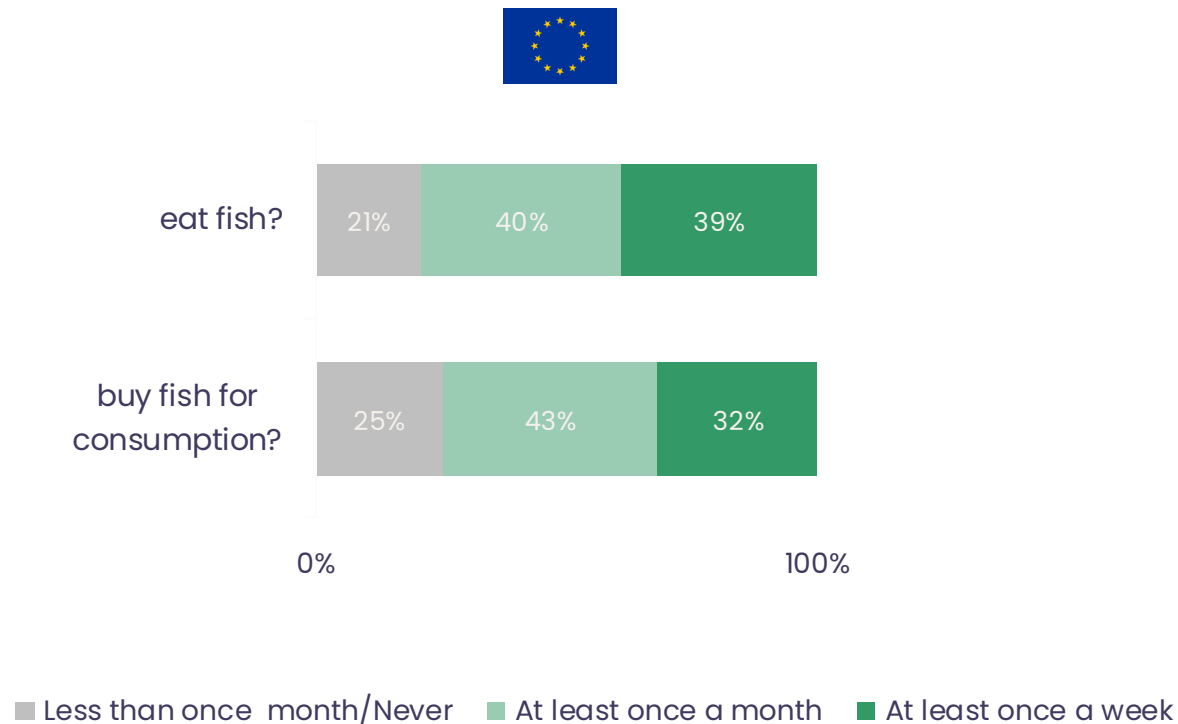


- The proportion of meat eaters is higher in Czech Republic (76%), Sweden (56%), Italy (53%) and Spain (51%), and lower in Germany (21%), France (37%), The Netherlands (39%) and Greece (43%).
- Men (52%), 35–54yo (48%) and +55yo (52%) also more often consume meat.

Base: total sample (EU countries: n=9197)

... and 4 out of 10 EU citizens consume fish at least once a week.

"Q11. Roughly how often, if at all, do you ...?"

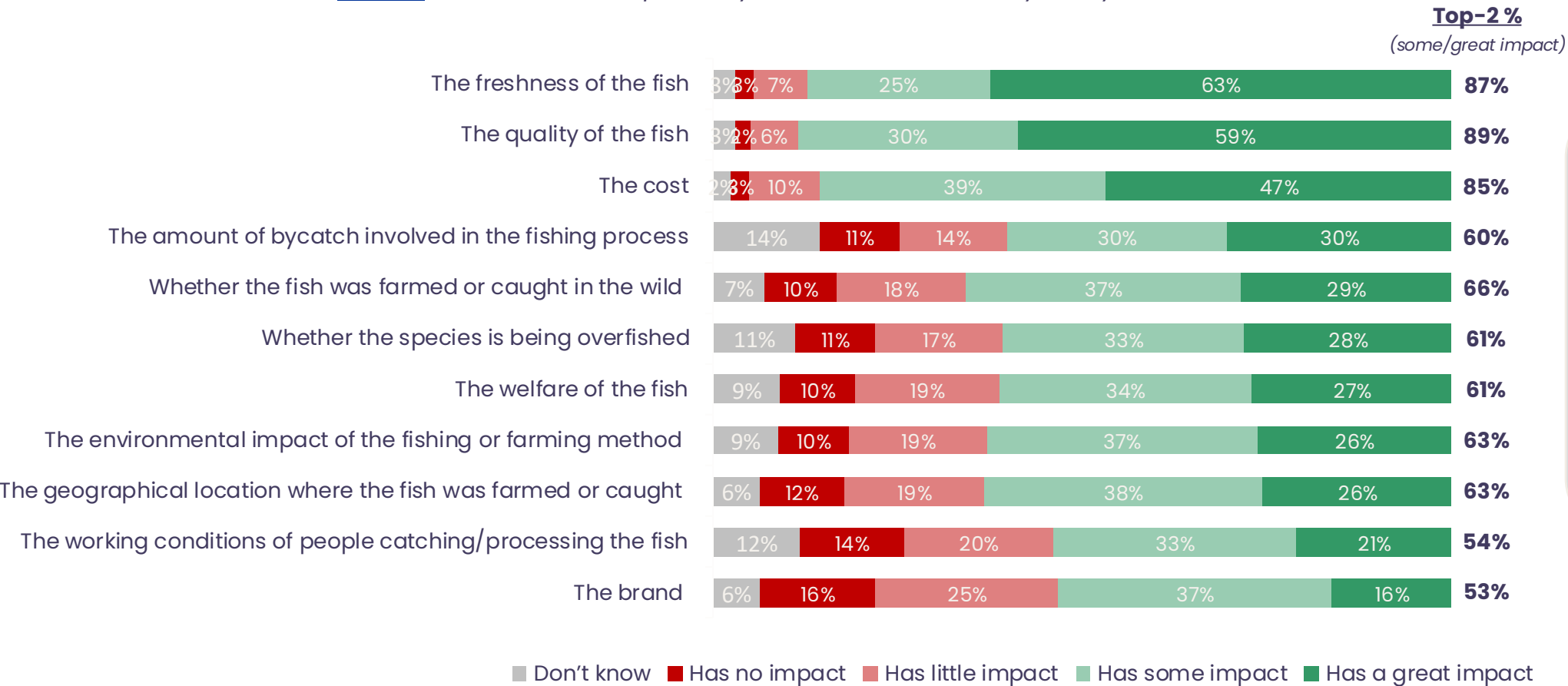


- Weekly fish consumption is higher in Spain (65%), Italy (52%) and France (45%), but lower in Czech Republic (13%), Germany (28%), The Netherlands (33%) and Poland (35%).

Consumers primarily prioritize factors such as freshness, quality, and cost when selecting fish. Additionally, 61% of consumers also take into account welfare-related considerations.



“Q12. To what extent, if at all, does each of the following things have an impact on your choice of which fish you buy?”



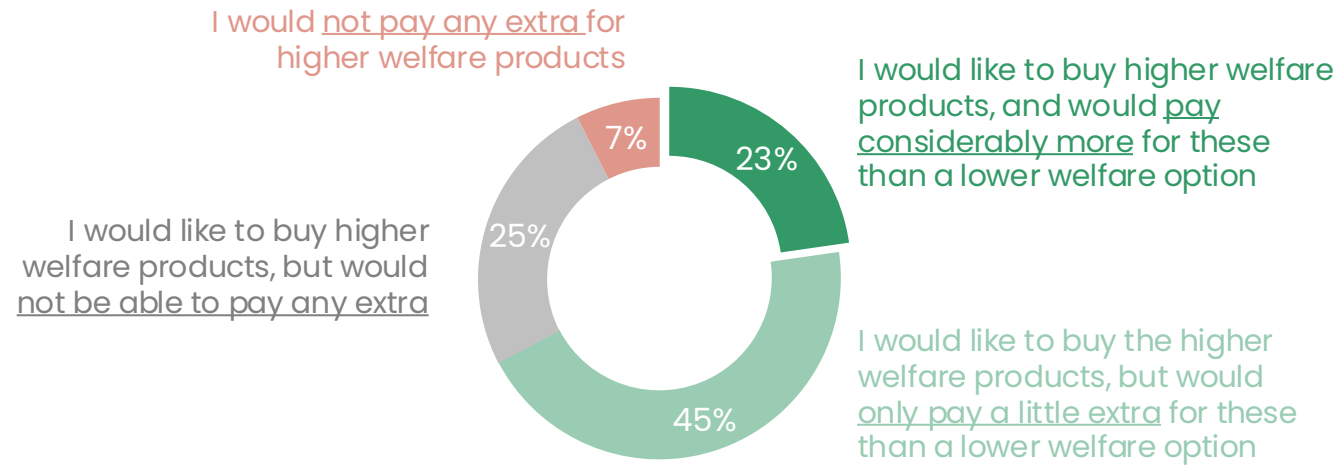
• The welfare of the fish has a bigger impact in Italy (71%), Germany (67%), Poland (67%) and Greece (67%), and a smaller impact in Czech Republic (45%), The Netherlands (49%) and Sweden (57%).

Base: buys fish for consumption (EU countries: n=8445)

The willingness to pay for higher welfare fish products is quite high: 9 out of 10 would like to buy higher welfare fish products, with almost 1 out of 4 willing to pay a significant premium.



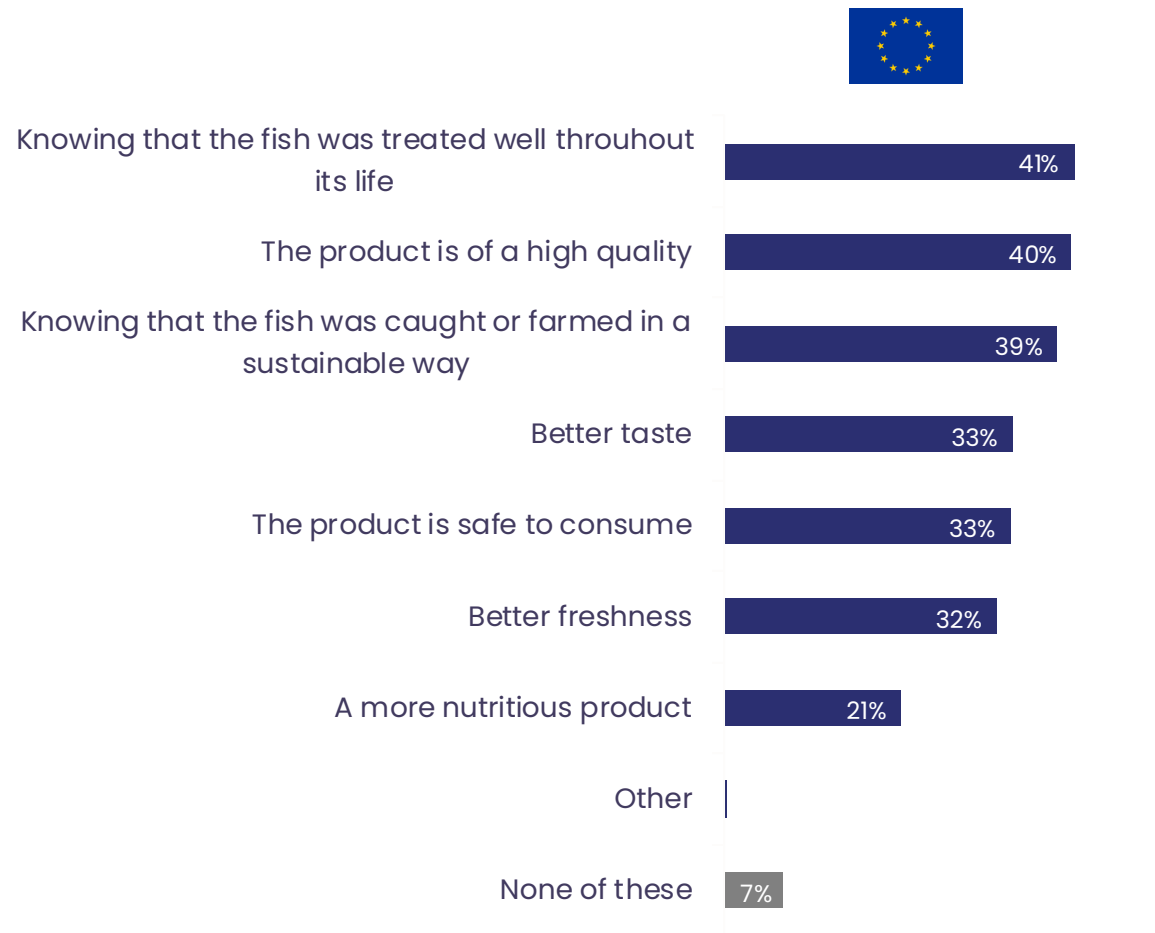
"Q13. Which of the following best describes your preferences when it comes to buying higher welfare fish products?"



- The top-2 willingness to pay for higher welfare fish products is higher in Poland (75%) and Germany, and lower in Czech Republic (60%) and Greece (60%).

Consumers recognize numerous benefits in opting for higher welfare fish products, encompassing both the welfare of the fish and the overall quality of the food.

“Q14. What, if anything, do you think are the benefits for you of choosing ‘higher welfare’ fish products?”



Base: total sample (EU countries: n=9197)

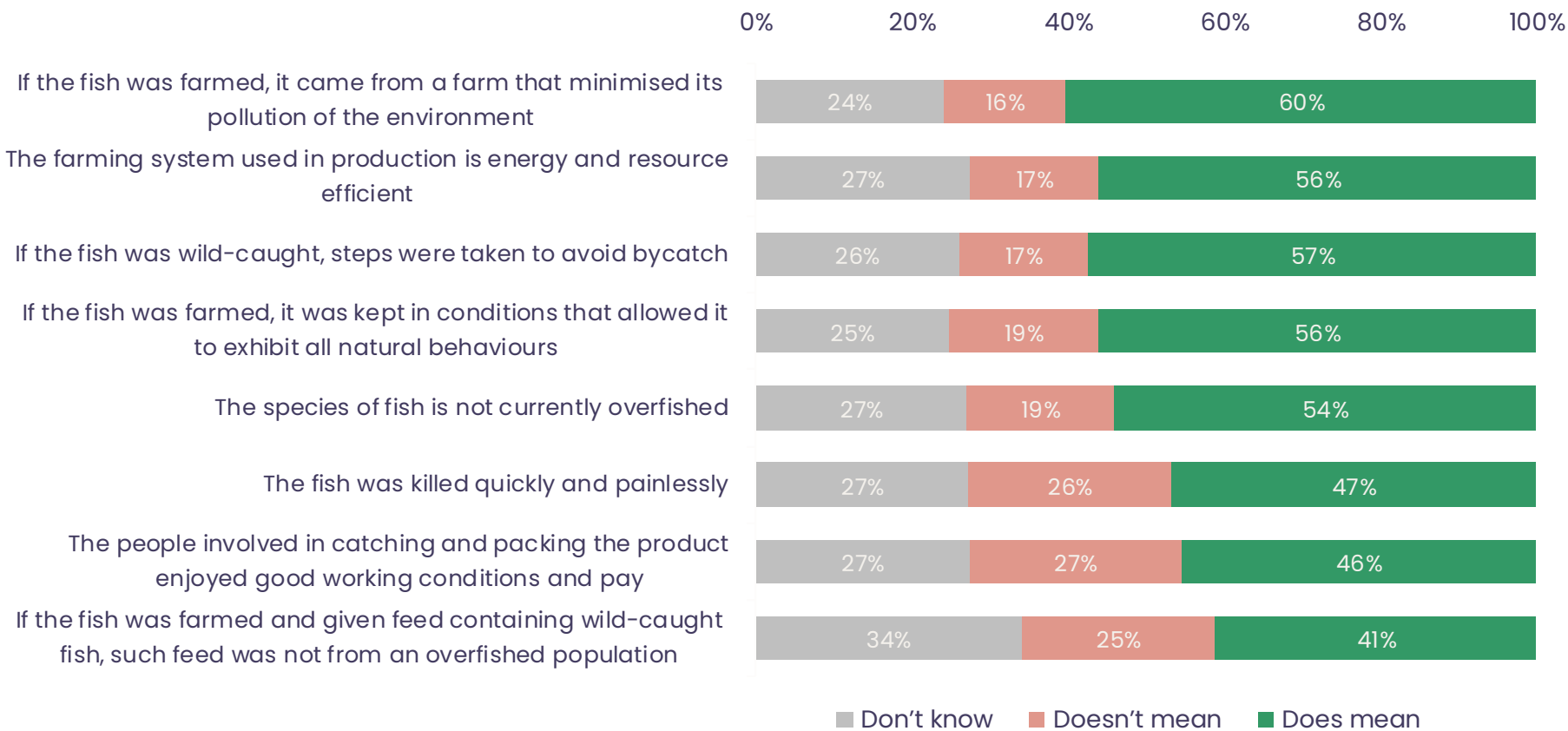


2.4 Welfare Labelling

EU citizens seem to associate aquatic animal welfare considerations with sustainability labels.



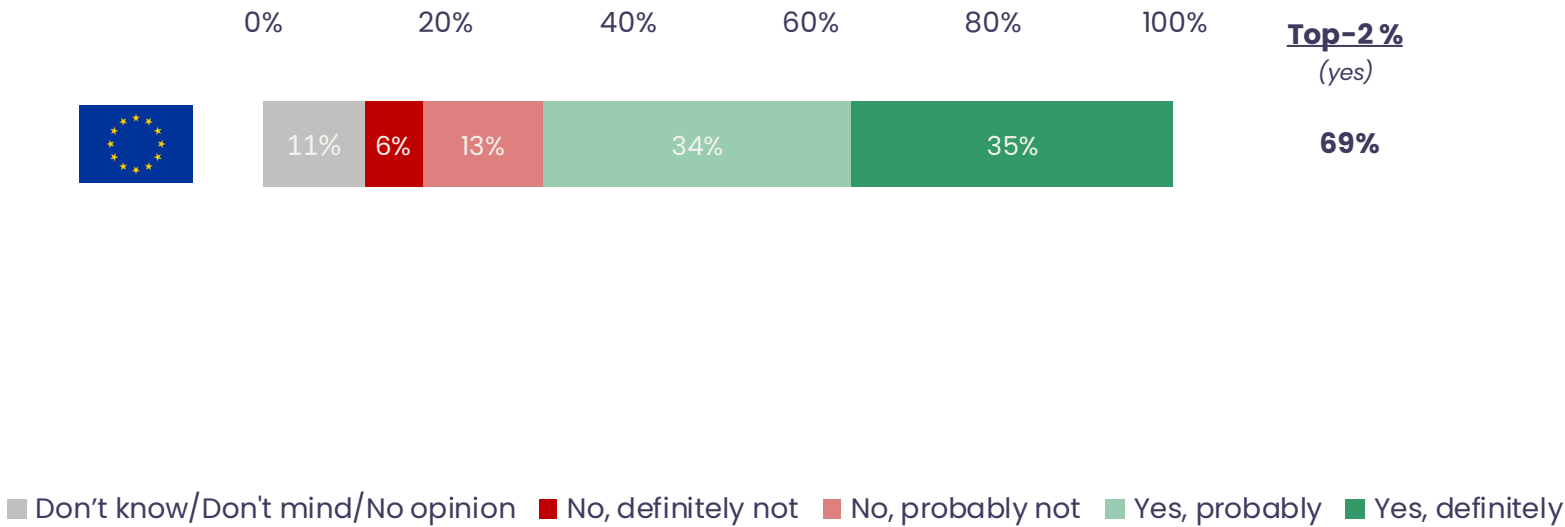
“Q16. In your opinion, which of the following, if any, do you think the term “Sustainable” on a fish product tells you about that product?”



Base: total sample (EU countries: n=9197)

They also show openness to having information about fish farming practices on the labels of fish products.

“Q15. Would you like to see information about the way in which the fish was farmed and killed on the label of all fish products?”



- Higher top-2 % in France (80%), Poland (76%), Germany (74%) and Italy (73%). Lower score in Czech Republic (60%), The Netherlands (60%) and Sweden (61%).
- Women would also appreciate this information more than men (71% vs. 67%).

Their current knowledge on common labels is nevertheless poor: they either lack awareness or believe that these labels impose rigorous welfare standards.

"Q17. Certification schemes set standards for aquaculture and/or fisheries. What do you think the following labels require?"

