

GLOBESCAN



evidence and ideas. applied

Consumer Attitudes to Sustainable Chicken:

A Quantitative General Public Survey in USA, UK and China

Key Highlights



Overview



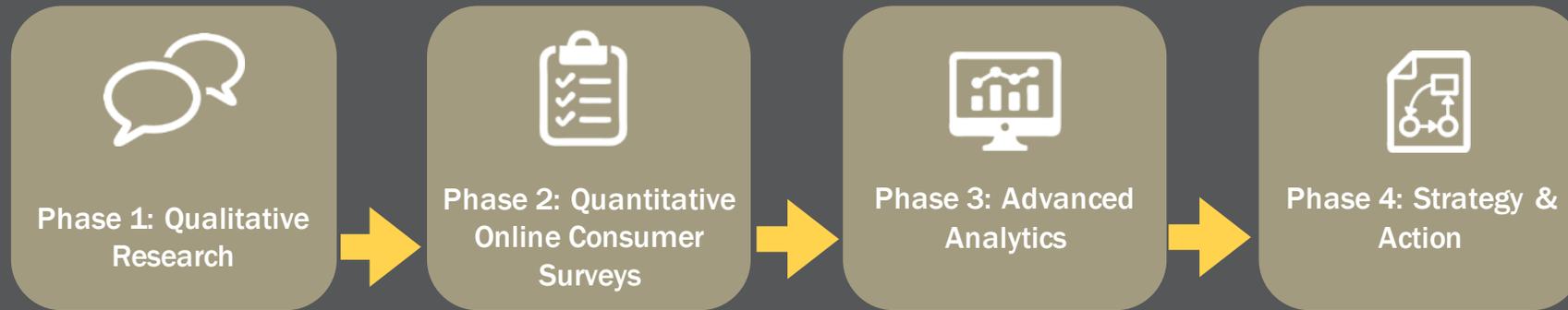
Background

Objective of this research is get a deeper consumer understanding of sustainable chicken to inform bold moves and roadmaps for Poultry Sustainability strategy.

More specifically, the research:

- Informs **strategy**
- Clarifies **how McDonald's can speak to consumers** about sustainable chicken
- Helps us understand **how sustainable chicken messages can play a role** and link to other initiatives in the business
- Identifies **what consumers expect** from McDonald's when it comes to sustainable chicken
- Helps us understand **channels of influence**
- Locates **priority consumer audiences**
- Identifies **themes** for PR and marketing around sustainable chicken

Our Approach



Key Takeaways



- Opportunity for us to **shape consumer sentiment** regarding “chicken sustainability”, but the **term itself should not be consumer-facing**
- Focus messaging on **existing customers** - Fast Food Lovers and Kid Pleasers
- Prioritize bold moves that ladder up to **ensuring that the end product is safer** and **builds trust in the source of their food** (such as feed and antibiotics)
- Poultry sustainability messaging **should not be siloed** –tell a **holistic story**
- Establish partnerships with **government bodies & animal welfare organizations** to tell your story

Scale for Good

McDonald's Chicken
Sustainability Strategy



Chicken Sustainability

We're on a journey to build a better McDonald's.

- 2003** Developed First Global Antibiotics Policy
- 2006** Supported the Establishment of the Soy Moratorium
- 2008** Implemented Third-Party Auditing Around the World
- 2010** Partnered with World Wildlife Fund (WWF)
Implemented Key Welfare Indicators & Antibiotic Monitoring and Improvement Plans
- 2012** Established Third-Party Verification
- 2014** Endorsed New York Declaration on Forests
Created Antimicrobial Stewardship Recommendations

- 2015** Released the Global Vision for Antimicrobial Stewardship (VAS) in Food Animals
Formalized Cage-Free Sourcing Efforts
Committed to Eliminating Deforestation from our Global Supply Chains
Recognized for Collective Contribution to the Brazilian Soy Moratorium
Support Development of Alternative Protein Sources to Soy for Chicken Feed
Committed to Purchase Only Sustainably Certified Soy
- 2016** Completed U.S. Antibiotics Chicken Commitment
Supported Indefinite Extension of Brazilian Soy Moratorium
- 2017** Refreshed VAS in Food Animals
Issued Antibiotics Use Policy for Broiler Chickens Outside the U.S.
Improving Key Welfare Outcomes Around the World



Chicken Sustainability:

- **Responsible Use of Antibiotics**
- **Broiler Welfare**
- **Sustainable Feed Strategy**



Responsible Use of Antibiotics

Commitment:

Eliminate the use of antibiotics defined by the WHO as Highest Priority Critically Important (HPCIA) to human medicine from all chicken served by 2027.

Taking a phased approach





Broiler Welfare Commitments:



1. Measuring key farm-level welfare outcomes on an ongoing basis, setting targets and reporting on progress
2. Developing state-of-the art welfare measurement technology
3. Environmental enrichment
4. Commercial trials
5. Implementing third-party auditing
6. Controlled Atmospheric Stunning (CAS) in the U.S. & Canada
7. Establishing a McDonald's Advisory Council for Chicken Sustainability.
8. Feasibility assessment on remaining global markets

Sustainable Feed Strategy



- Commitment: Purchase 100% sustainable certified soy by 2020 in Europe.
- Working with our suppliers and research institutes to support the development of novel alternative protein feeds

