

Executive Summary: Viewpoints of the U.S. Public and Cow-Calf Producers on Animal Welfare in the Beef Industry

July 30, 2015

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*** The views expressed here are those of the authors and may not be attributed to the U.S. Department of Agriculture which the authors acknowledge for providing partial funding support for this research (National Institute of Food and Agriculture Grant No. 2012-68006-30178).**

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The U.S. livestock industry is increasingly faced with pressure to adjust practices in response to societal concerns. A specific area of growing concern surrounds how production practices impact the welfare of farm animals. Although consumers' concerns and attention to animal welfare have increased recently, corresponding research and outreach efforts have not kept pace. It is important to understand the social and economic implications for the beef industry of animal welfare concerns. This understanding starts with a benchmarking of existing awareness and perceptions of both producers and the public. A research and extension project funded by a U.S. Department of Agriculture (USDA) grant¹ provides this benchmarking information by identifying the U.S. public and producer perceptions of animal welfare in the beef and dairy industries. This executive summary highlights some key responses to survey questions assessing U.S. public and cow-calf producer perceptions of animal welfare in the beef industry. Two separate full summary reports are available containing more details on each survey.

Research Design

A nationally representative² online survey was administered in December 2013 to collect information about U.S. public's beef purchasing habits, perceptions of the cow-calf sector of the beef industry and demographic characteristics. Mail and online surveys were administered in December 2013 to collect information about U.S. cow-calf producers' current production practices, perceptions of the cow-calf sector of the beef industry and demographic characteristics. The surveys were written by a team of Kansas State University and Michigan State University researchers. The U.S. public survey had 1,992 useable responses. Furthermore, the U.S. public survey respondents were randomly selected to take a ground beef (n=995) or beef steak (n=997) version of the survey. A total of 686 usable surveys were analyzed from U.S. cow-calf producers.

U.S. Public's Beef Purchasing

Respondents were asked if they had purchased ground beef or beef steak with selected attributes such as animal welfare assured, organic, and hormone-free, as well as the premium they were willing to pay (WTP) per pound for ground beef or beef steak with these same attributes. For the majority of attributes, at least one-quarter of respondents were unsure if they had purchased beef products with the attribute. This inability to recall whether they had purchased beef products

¹ National Institute of Food and Agriculture Grant No. 2012-68006-30178.

² Age, gender, income, education, and state of residence were used as representation controls.

with these attributes could reflect not significantly caring about beef product attributes, not understanding beef labeling, or product labeling not clearly detailing these product attributes. Natural and locally produced were the most frequently purchased attributes in ground beef while natural, locally produced and guaranteed tender were the most frequently purchased beef steak attributes. The fewest respondents across both beef products recalled purchasing said products that were animal welfare assured or sustainably produced.

Respondents were asked to indicate the largest premium they would be WTP for a one pound package of ground beef or beef steak products over products produced through conventional means assuming both products were the same brand. Over 80% of respondents indicated they would pay a premium for natural, locally produced, and guaranteed tender ground beef. Additionally, 88% were WTP the premium for natural, locally produced and guaranteed tender beef steak. These stated values likely overstate real demand given the hypothetical nature of the survey questions. Nonetheless, an important point was finding animal welfare assured and sustainably produced to be the attributes which the fewest respondents were WTP a premium for.

A separate WTP question randomly assigned respondents a premium per pound (between \$0.25/lb. and \$3.00/lb.) and asked participants if they were WTP the premium per pound for 13 different attributes in beef steak or ground beef that could be associated with animal welfare discussions and debates in the industry and general media. As the premium increased, a smaller percentage of respondents were WTP a premium for each attribute consistent with expectations of price sensitivity. Across both ground beef and beef steak and all premium values, the largest percentage of respondents were WTP a premium for cattle provided access to fresh, clean feed and water, and the least for dehorn (remove horns)/disbud calves either before horn tissue adheres to skull or with pain control.

U.S. Cow-Calf Producers' Production Practices

The cow-calf producers in the survey were asked to indicate which of 13 actions/practices are currently implemented on their operations. The practices which are reportedly implemented by the most respondents are provide access to fresh, clean feed and water appropriate for the animal's physiological state, provide adequate comfort through the use of shade, windbreaks, and ventilation assuring clean, dry, sanitary environmental conditions, and promptly treat or euthanize all injured or sick animals. Additionally, one-half of respondents were asked to select all of the 13 actions/practices they would implement if they received a \$5/cwt premium on each animal sold, while the other half of respondents were asked which they would implement to avoid a \$5/cwt discount on each animal sold. The two practices which the most cow-calf producers were willing to implement to receive the \$5/cwt premium or avoid a \$5/cwt discount were provide access to fresh, clean feed and water appropriate for the animal's physiological state, and provide adequate comfort through the use of shade, windbreaks, and ventilation assuring clean, dry, sanitary environmental conditions. Note, these are practices which many producers stated were already in place on their operations. The practice which the fewest cow-calf producers were willing to implement was third party verification that appropriate animal

care and facilities are provided on farm. This was consistent with a broader finding that respondents revealed multiple points of concern or hesitation regarding use of third party verification.

Comparing U.S. Public and Cow-Calf Producer Perceptions of the Beef Industry

In order to gauge respondents' perceptions of beef cattle production, survey respondents were asked about their belief in the percentage of U.S. beef product which comes from cattle produced under certain practices and conditions. Respondents could select 25% increments from 0%-25%, 26-50%, 51-75%, 76-100% or *don't know*. On average *don't know* was selected 15% of the time by producers and 31% by U.S. public members. Many respondents to both surveys were unsure about the percentage of U.S. cattle that come from farms that are dehorned/disbudded with pain control. The practices which the most U.S. public respondents thought were commonly in place throughout the beef industry were cattle provided access to fresh, clean feed and water (58%), cattle provided antibiotics to prevent illness and disease (60%), and farms/ranches providing appropriate overall care for the well-being of their cattle (52%). The practices which the producer respondents thought were most commonly in place throughout the beef industry were cattle provided access to fresh, clean feed and water (80%), and farms/ranches providing appropriate overall care for the well-being of their cattle (80%). A multitude of knowledge gaps were identified regarding current production practices in place in the beef industry.

Respondents to both surveys were shown a list of nine supporting principles and asked if each should be a supporting principle of the U.S. beef industry. Responses were on a scale from *strongly agree* to *strongly disagree* and included a *don't know* option. Over 50% of U.S. public respondents and over 80% of U.S. cow-calf producers *strongly agreed* or *agreed* that each principle should be a guiding principle of the U.S. beef industry. The strongest support was engendered by generating a safe supply of beef products.

Many sources are available to collect information about beef cattle welfare. The surveys inquired about the accuracy of 16 potential sources for beef cattle welfare information and collectively revealed another knowledge gap. For each source, over 25%, and at times over 35%, of U.S. public respondents did not know the accuracy of the beef cattle welfare information provided by the party. This inability to judge the accuracy of a source for animal welfare information could be problematic as 65% of U.S. public respondents indicated they were concerned about U.S. beef cattle welfare. The U.S. public respondents viewed the USDA as the most accurate source for animal welfare information while cow-calf producer respondents viewed local veterinarians and cow-calf producers as the most accurate sources. Additionally, respondents were asked to rate the ability of each of the 16 parties to influence beef cattle welfare. Over 50% of U.S. public respondents thought the USDA, National Cattlemen's Beef Association (NCBA), the American Farm Bureau (AFB) and cow-calf producers had *high* or *very high ability* to influence beef cattle welfare. Comparatively, over three-fourths of cow-calf producer respondents viewed feedlot producers and cow-calf producers as having *high* or *very high ability* to influence beef cattle welfare.

Beef producers and U.S. public members are no longer just meeting in the grocery store meat section, they are also meeting at the voting booth. Recently, animal welfare has been a subject of voting initiatives. Furthermore, a divergence in purchasing and voting behavior has materialized. Thus, U.S. survey respondents were asked about their willingness to vote and willingness to pay a premium for four different production adjustments and producers were asked if they believed the average American would be willing to vote or pay a premium for the production adjustments. The largest “vote-buy gap” in U.S. public respondents responses was found for banning cattle castration without the use of pain control. Overall, producers generally understated the public’s willingness to vote or pay a premium for the production practices.

Conclusions

A multitude of opportunities and challenges are facing the U.S. beef cattle industry. One well-recognized issue in industry dialogue, but lacking in research based understanding, is perceptions and awareness of cattle welfare in the U.S. beef industry. This project surveyed both U.S. cow-calf producers and the general U.S. public as an attempt to start what must be considered an ongoing effort to fill this knowledge gap. Key findings regarding similarities between producers and the public in views and expectations can be used to help initiate productive discussions on how to assure proper welfare outcomes for U.S. beef cattle. Likewise, differences in understanding and perceptions as identified in this work may serve as launching points into focused efforts to alleviate confusion and increase dissemination of accurate information.