

Benchmarking Industry Self-Perceptions Regarding Animal Welfare

2012 NIAA Annual Conference



March 26-29, 2012 * Denver, Colorado

Glynn Tonsor, Kansas State University

USDA Project Overview

“Beef And Dairy Cattle Animal Welfare: Market Opportunities And Threats”

- Goal & Objectives:
 - The long-run goal of this project is to improve the situation presented by growing animal welfare concerns for U.S. beef and dairy cattle operations.
 - Specific objectives include to engage producers to benchmark knowledge and awareness, to identify and document perceptions of animal welfare issues from both consumer and producer perspectives, and to disseminate generated knowledge widely and effectively through novel and practical outreach efforts.
- Collaborators: KSU – Dr. Dan Thomson; MSU – Dr. Chris Wolf & Dr. Janice Swanson

USDA Project Overview

“Beef And Dairy Cattle Animal Welfare: Market Opportunities And Threats”

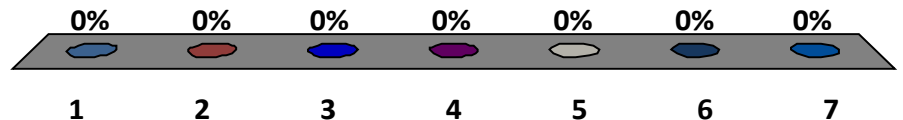
- Timeline: Jan. 2012 – Dec. 2014
- Activities:
 - 2012: Focus groups, phone interviews, & pilot testing
 - 2013: Consumer & producer surveys & experiments
 - 2014: Analysis, write-up, & dissemination
- Purpose of this session:
 - Improve beef and dairy cattle producer surveys

Context on Questions & Answers

- A subset of attendees at the 2012 NIAA meeting provided these responses. Specific identities of these participants was not gathered. Accordingly, the answers provided to the following multiple choice questions should not be considered representative of any particular population. More narrowly, this Q&A session was designed as a focus group activity to improve upcoming nationally representative producer surveys and use of any given Q&A slide below in isolation is discouraged.

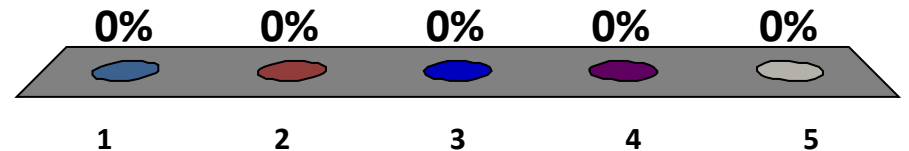
Which species industry are you most involved with?

1. Beef cattle
2. Dairy cattle
3. Swine/hogs
4. Broilers
5. Laying hens
6. Equine
7. Other



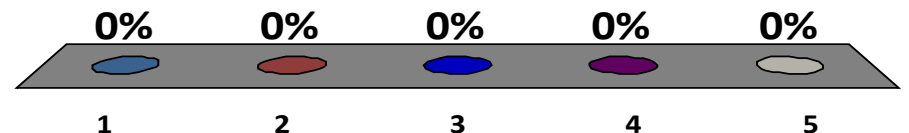
What portion of beef cow-calf operations in the U.S. have fewer than 100 cows?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



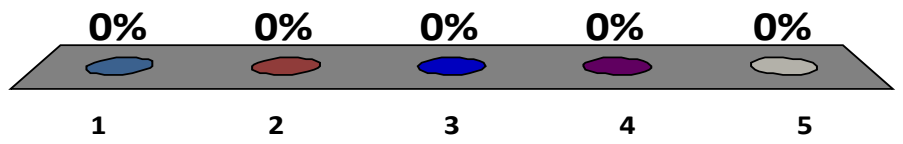
What portion of beef produced in the U.S. do you believe comes from operations/production systems providing appropriate overall care?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



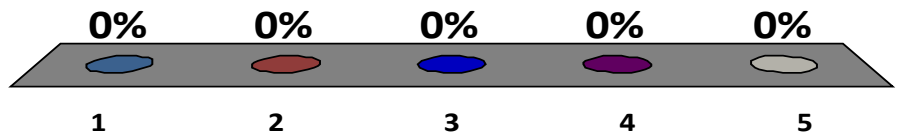
What portion of beef produced in the U.S. do you think the typical U.S. resident believes comes from operations/production systems providing appropriate overall care?

- 1. 0-25%
- 2. 26-50%
- 3. 51-75%
- 4. 76-100%
- 5. I don't know



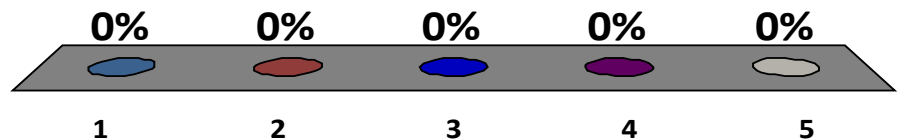
What portion of milk produced in the U.S. do you believe comes from operations/production systems providing regular access to the outdoors and pasture for their cows?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



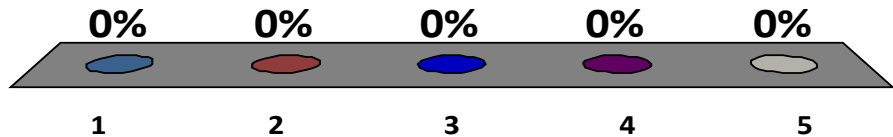
What portion of pork produced in the U.S. do you believe comes from operations/production systems using sow gestation stalls?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



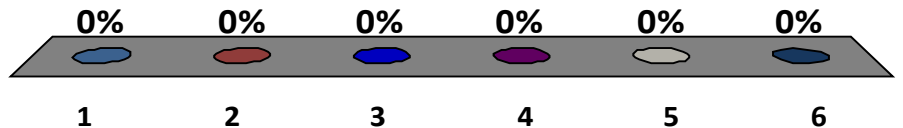
What portion of U.S. residents do you believe would vote in-favor of banning the use of sow gestation stalls throughout the U.S. swine industry?

- 1. 0-25%
- 2. 26-50%
- 3. 51-75%
- 4. 76-100%
- 5. I don't know



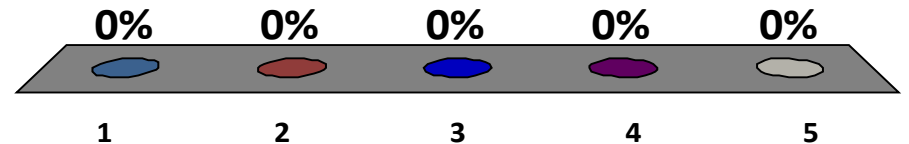
What portion of total eggs sold in the U.S. do you think are cage-free eggs?

1. 0-10%
2. 11-20%
3. 21-30%
4. 31-40%
5. Over 40%
6. I don't know



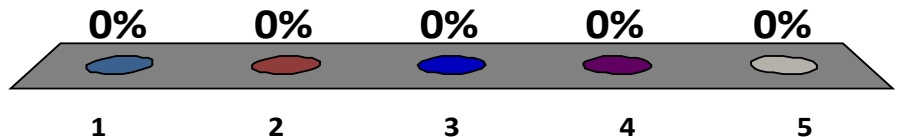
How much of a price premium do you think is currently paid for cage-free eggs in the U.S.?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



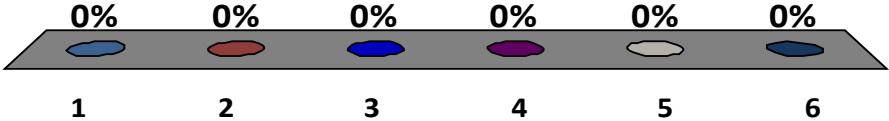
What portion of U.S. residents do you believe would vote in-favor of banning the use of battery cages throughout the U.S. egg laying hen industry?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



Which of the following do you believe presents the best option/strategy given the current discussions regarding animal welfare issues in your industry?

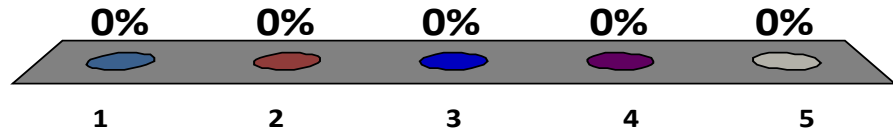
- 1. Maintain the status quo
- 2. Actively negotiate with concerned groups
- 3. Actively seek additional legislation/regulation
- 4. Support retail labeling to convey animal welfare information
- 5. Support phasing out existing facilities using debated production practices



6. Other

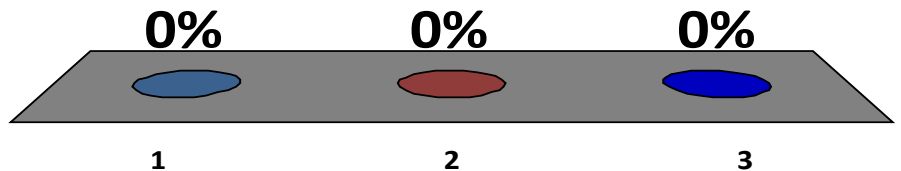
How likely are new or expanded national standards regarding livestock housing practices to be implemented in the U.S. (pertaining to your industry) within the next 10 years?

- 1. Very Likely
- 2. Likely
- 3. Neither Likely nor Unlikely
- 4. Unlikely
- 5. Very Unlikely



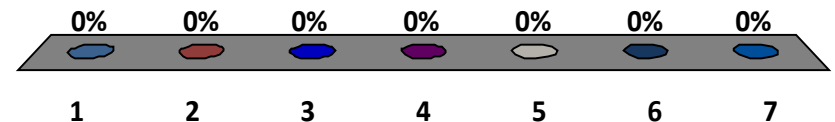
How do you think animal welfare concerns facing your industry compare to those faced by other species-delineated industries?

1. My industry is facing *less* concerns
2. My industry is facing *about the same* concerns
3. My industry is facing *more* concerns



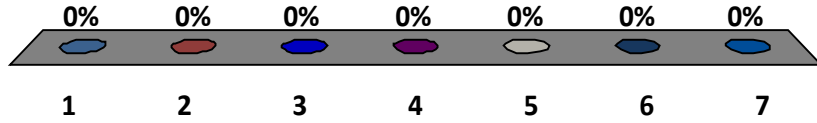
Given current practices listed below, what do you believe is the most effective option to improve the welfare of livestock in your industry?

1. Requiring regular access to the outdoors
2. Prohibiting tail docking/removal
3. Prohibiting use of antibiotics and growth hormones
4. Prohibiting use of stalls and/or cages
5. Requiring use of anesthesia prior to surgical procedures
6. Requiring use of certified transportation
7. Other



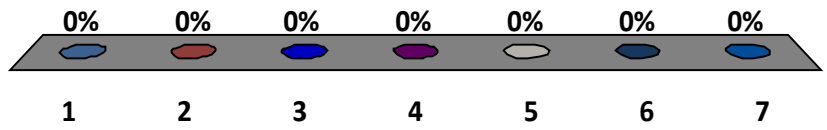
What option for improving the welfare of livestock in your industry do you believe would result in the largest, most positive consumer response?

- 1. Requiring regular access to the outdoors
- 2. Prohibiting tail docking/removal
- 3. Prohibiting use of antibiotics and growth hormones
- 4. Prohibiting use of stalls and/or cages
- 5. Requiring use of anesthesia prior to surgical procedures
- 6. Requiring use of certified transportation
- 7. Other



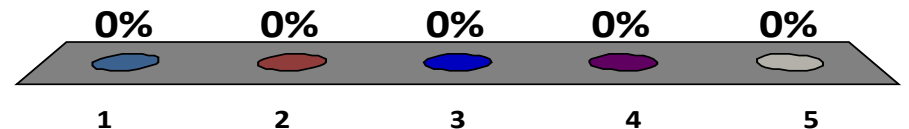
What option for improving the welfare of livestock in your industry do you believe would result in the largest increase in production costs?

- 1. Requiring regular access to the outdoors
- 2. Prohibiting tail docking/removal
- 3. Prohibiting use of antibiotics and growth hormones
- 4. Prohibiting use of stalls and/or cages
- 5. Requiring use of anesthesia prior to surgical procedures
- 6. Requiring use of certified transportation
- 7. Other



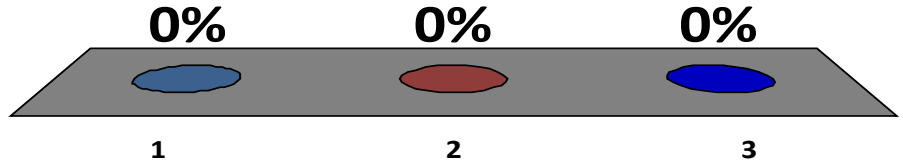
What portion of U.S. residents do you believe would vote in-favor of mandatory labeling of livestock housing practices on retail meat, milk, and egg products?

1. 0-25%
2. 26-50%
3. 51-75%
4. 76-100%
5. I don't know



Are you in favor of laws prohibiting photographs or videos to be taken on farms without permission?

- 1. Yes, I'm in favor of these laws
- 2. No, I'm opposed to these laws
- 3. I don't know



More information @ AgManager (<http://www.agmanager.info/>)

<http://www.agmanager.info/livestock/marketing/AnimalWelfare/default.asp>



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In The Cattle Markets	Livestock & Hay Charts	Marketing Strategies	USDA News	Projected Budgets	BeefBasis.com	Animal ID & Traceability
Livestock Outlook Radio	Livestock Databases	Financial Analysis	Futures Market Prices	Historical Budgets	NAIBER	Animal Well-Being
Cattle Finishing Returns	Beef Demand Charts	Trade and Demand	Pork Price Reporting	Production Economics	LMIC	CLPER
	Grain Supply & Demand	Price Risk	Interest Rate Forecasts	LRP Insurance		
		Management		Policy		

Livestock & Meat Marketing: Animal Well-Being and Welfare

Title	Author	Date	Factsheet, Paper, Presentation, or Journal article	Video
Mandatory Labeling of Animal Welfare Attributes: Public Support and Considerations for Policymakers	Tonsor and Wolf	July, 2011	Journal Article Fact Sheet (AM-GT-2011.1)	WMV MP4
U.S. Meat Demand: The Influence of Animal Welfare Media Coverage	Tonsor	September, 2010	Journal Article Fact Sheet (MF2951)	WMV MP4
Consumer Preferences for Animal Welfare Attributes: The Case of Gestation Crates	Tonsor , Olynk , and Wolf	December, 2009	Journal Article	WMV MP4
Consumer Voting and Demand Behavior Regarding Swine Gestation Crates	Tonsor , Wolf , and Olynk	July, 2009	Journal Article	WMV MP4
Consumer Use, Perceptions, and Demand Impacts of Alternative Animal Information Sources	Tonsor	July, 2009	Presentation	
Alternative Animal Welfare Responses: Options and Implications for Producers and Industry-at-Large	Tonsor	March, 2009	Presentation	

Animal Welfare Videos by [Dr. Glynn Tonsor](#)

Mandatory Labeling of Animal Welfare Attributes (New!)

Consumer Preferences for Animal Welfare Attributes: The Case of Gestation Crates

Consumer Voting and Demand Behavior Regarding Swine Gestation Crates

More information available at:
AgManager (<http://www.agmanager.info/>)

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