



2009 FOOD SYSTEM  
**SUMMIT**  
THE NEW NORMAL

**Food Animal Well-Being  
Breakout Session**



# How the Public Thinks and Responds

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## 3 Consumer/Resident Surveys (Drs. Glynn Tonsor and Christopher Wolf)

- Nov. 2007; 1,000 mail surveys in MI
  - 205 completes available for analysis
- June 2008; 1,001 online surveys across U.S.
  - Focused on pork; gestation crate/stall (GC) use
- Oct./Nov. 2008; 2,000 online surveys across U.S.
  - Oriented around CA's Proposition 2 issues
  - Several projects/grant proposals underway



*How much do you agree that the following practices seriously reduce the welfare of farm animals?*

- Castration, Tail Docking, Cages/Crates, Indoor Confinement
- Swine, Dairy Cattle, Beef Cattle, Laying Hens
  - Responses are grouped by production practice rather than species.
  - Suggests ‘no industry is immune’ and that concerns are global across species

Source: Survey of 2,000 U.S. residents (Oct./Nov. 2008)



## Perceived Animal Welfare Information Accuracy (1=Very Inaccurate, ..., 7=Very Accurate)

The Humane Society of the U.S. (HSUS)	4.93
University Scientists/Researchers	4.47
People for the Ethical Treatment of Animals (PETA)	4.22
National Milk Producers Federation (NMPF)	4.20
U.S. Poultry & Egg Association	4.18
National Cattlemen's Beef Association (NCBA)	4.11
United Egg Producers (UEP)	4.10
National Pork Producers Council (NPPC)	4.07
State Governmental Agencies	4.00
Federal Governmental Agencies	4.00

Source: Survey of 2,000 U.S. residents (Oct./Nov. 2008)



## Perceived Ability to Influence and Assure Animal Welfare (1=Very Low Ability, ..., 7=Very High Ability)

Farmer/Grower	5.33
Government Inspectors/Regulators	5.16
The Humane Society of the U.S. (HSUS)	5.00
Meat or Milk Processor	4.68
Animal Industry Representative Groups	4.58
People for the Ethical Treatment of Animals (PETA)	4.44
Consumer – Food Purchaser	4.38
Retail Grocer	3.71
Food Service Restaurant	3.59

Source: Survey of 2,000 U.S. residents (Oct./Nov. 2008)



## *CA's Proposition 2 Question:*

*Law would require farmers nationally to confine calves raised for veal, egg-laying hens, and pregnant pigs only in ways that allow these animals to lie down, stand up, fully extend their limbs, and turn around freely.*

- CA actual vote: 63% FOR
- Survey national question:
  - National support: 70% FOR
  - CA residents: 70% FOR
  - MI residents: 69% FOR
  - IA residents: 57% FOR

Source: Survey of 2,000 U.S. residents (Oct./Nov. 2008)



*“... three states have passed either ballot initiatives (AZ and FL) or state legislature (OR) that will ban the use of gestation crates by swine operations in their respective states at different points in the future. ... Would you vote **FOR** or **AGAINST** the ban?”*

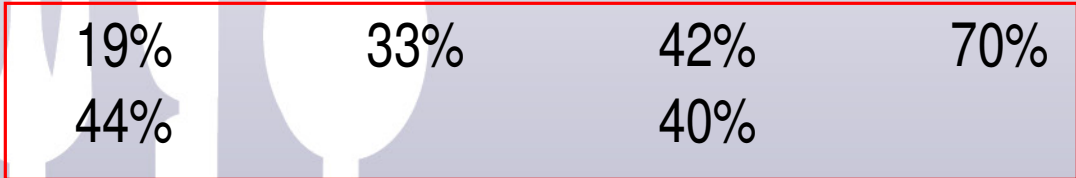
- 69% nationally (omitting FL, AZ, OR, CO) would vote FOR the ban
  - FL: 55% FOR to 45% AGAINST (Nov. 02’)
  - AZ: 62% FOR to 38% AGAINST (Nov. 06’)

Source: Survey of 1,001 U.S. residents (June 2008)



# Perceived pork price impacts of GC ban:

	FOR a G.C. Ban		AGAINST a Ban	
	Raw %	"Know" %s	Raw %	"Know" %s
Fall by 11% or more	3%	5%	5%	8%
Fall by 6-10%	3%	5%	2%	3%
Fall by 1-5%	3%	5%	0%	0%
Change by less than 1%	6%	11%	2%	3%
Increase by 1-5%	9%	16%	2%	3%
Increase by 6-10%	14%	25%	7%	12%
Increase by 11% or more	19%	33%	42%	70%
Don't Know	44%		40%	



Source: Survey of 1,001 U.S. residents (June 2008)



# Labeling Impacts on G.C. Ballot Support (69% FOR initially)

- 18% of ban supporters would change vote if:
  - ‘all pork products in the US included more complete labeling information accurately depicting if gestation crates were used...’
    - Net count would be 56.5% FOR the ban
- 23% of ban supporters would change vote if:
  - ‘all pork products raised using gestation crates were labeled as such and certified to have passed additional food safety inspections...’
    - Net count would be 53.6% FOR the ban

Source: Survey of 1,001 U.S. residents (June 2008)



# Determinants of voting response in GC ban questions:

- Observable demographics are NOT drivers
- State of residence and pork industry prevalence are NOT drivers
- Perceptions are highly influential
  - Those associating GC use with more food safety risk, lower pork quality, larger farm size, or corporate ownership are more likely to support the ban.

Source: Survey of 1,001 U.S. residents (June 2008)



# Ballot Voting Implications

- Targeting residents is difficult (latent perceptions drive voting)
- Residents were insensitive to # years for producers to comply (6-8 is common).
  - 1<sup>st</sup> or most heard voice may set adjustment timetable
  - Substantial costs of not being active or sending mixed signals
  - Industry may have opportunity to pursue longer implementation timetable



## *Would you be in favor of mandatory labeling of:*

- *all pork that was produced by farms using gestation crates/stalls?*
  - 62% YES
    - CA: 66%; IA: 44%; MI:59%
- *all eggs that were produced by farms using laying hen cages?*
  - 62% YES
    - CA: 65%; IA: 44%; MI:65%
  - COMPARE WITH COOL DISCUSSIONS
  - LABELING IS ALTERNATIVE TO PRODUCTION BANS
    - But it does have trade (NAFTA, WTO,...) implications (as does COOL)

Source: Survey of 2,000 U.S. residents (Oct./Nov. 2008)



## An Additional Critical Point

- A state passing a ballot initiative is likely unnecessary to cause change:
  - Packers may switch:
    - Cost of segregation; switch at some critical volume
    - External PR pressures will likely continue to mount
- Example: cash- to lean- pricing of market hogs
  - Wasn't mandated, but market increasingly encouraged transition
    - **Implication**: "Fighting ballot initiatives at all costs" may not be optimal



# Many Pieces of Missing Information

- Perceptions of alternatives
  - How do 6-8 sow pens, 70-80 sow pens, and pasture systems compare?
- What are residents willing to give up for more oversight of animal well-being? (i.e., CA's enforcement of Prop. 2)
- Evaluation of alternative legislative possibilities is needed:
  - Regional vs. national implementation
  - Longer term, possible reversal of ballot initiatives
- Modeling of consumer, producer, societal impacts
  - Farm size, facility age, region of production, etc. drive diverse producer impacts
  - Preferences, perceptions, meat consumption habits, and governmental resource allocation drive consumer & resident impacts



## Summary Points

- Consumer desires regularly drive change
  - “Accurate knowledge” is NOT necessary to be influential (perception drives decisions)
  - Growing demand for more transparency (i.e., labeling desires)
- Consumers associate “good AW practices” with smaller farms, higher food safety
- Voting behavior appears rather robust nationally
- Voting behavior & regulation impacts all
  - Much work remains....