

Cattle Care & Well-being

SURVEY REPORT



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INDUSTRY OUTLOOK

The cattle industry today is facing increased challenges, including stronger consumer demands, environmental sustainability factors and animal welfare and labor issues, to name a few. Whether it's a cow-calf rancher, stocker grower, feedyard producer or beef cattle veterinarian, these audiences are looking for ideas and information to keep their animals and operations healthy.

Merck Animal Health (MAH), through a comprehensive survey called the Cattle Care and Well-being Survey, reached out to a sampling of these audiences to get a pulse on their concerns, priorities and where they could use the most help. This report serves as a glimpse into their lives competing in today's changing environment framework and helps MAH deliver tools and resources to serve their needs.

SURVEY OBJECTIVES

To assess and determine the needs of beef cattle producers and veterinarians related to beef cattle care and welfare, leading to the development of potential tools and resources provided by MAH to these audiences.

TARGET AUDIENCES

The target audiences are beef cattle producers – cow-calf, stocker and feedyard – and beef cattle veterinarians.

METHODOLOGY

Veterinary advisory boards, beef producers and veterinarians with connections to Merck Animal Health representatives, and lists purchased from top-tier trade publications were all avenues utilized to survey the target audiences.

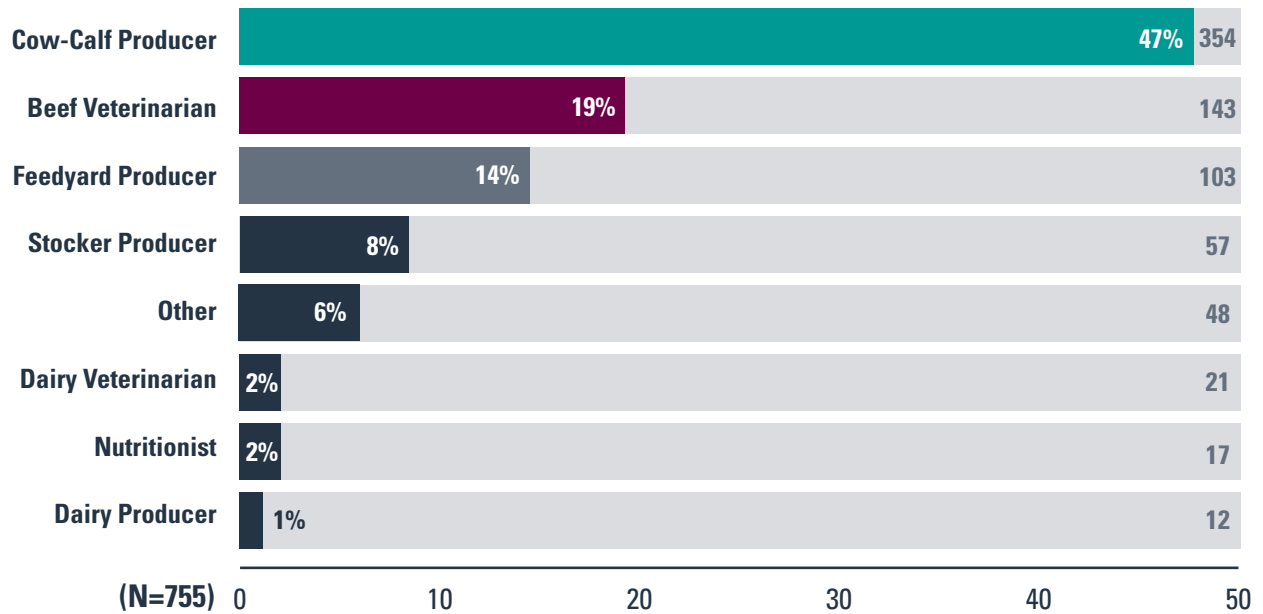
Data was analyzed based on the number of respondents within each category and as the percentage of the total number of survey respondents.

DEMOGRAPHIC RESULTS

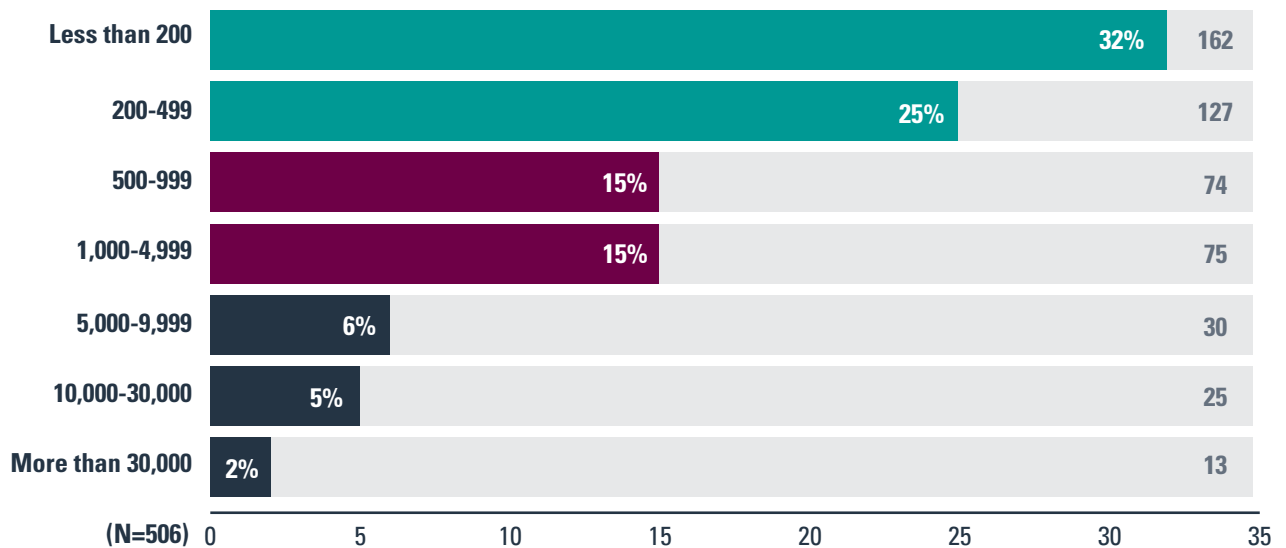
The total number of respondents was 755, with 674 completed responses to the assessment. This includes 354 cow-calf producers (47%), 57 stocker operators (8%), 103 feedyard operators (14%), 143 beef veterinarians (19%) and 17 nutritionists (2%). Respondents who identified themselves as dairy producers or dairy veterinarians, as well as those who chose the "Other" category to best describe themselves, were not included in the analysis due to not being in one of the target audiences.

SURVEY QUESTIONS AND RESPONSES

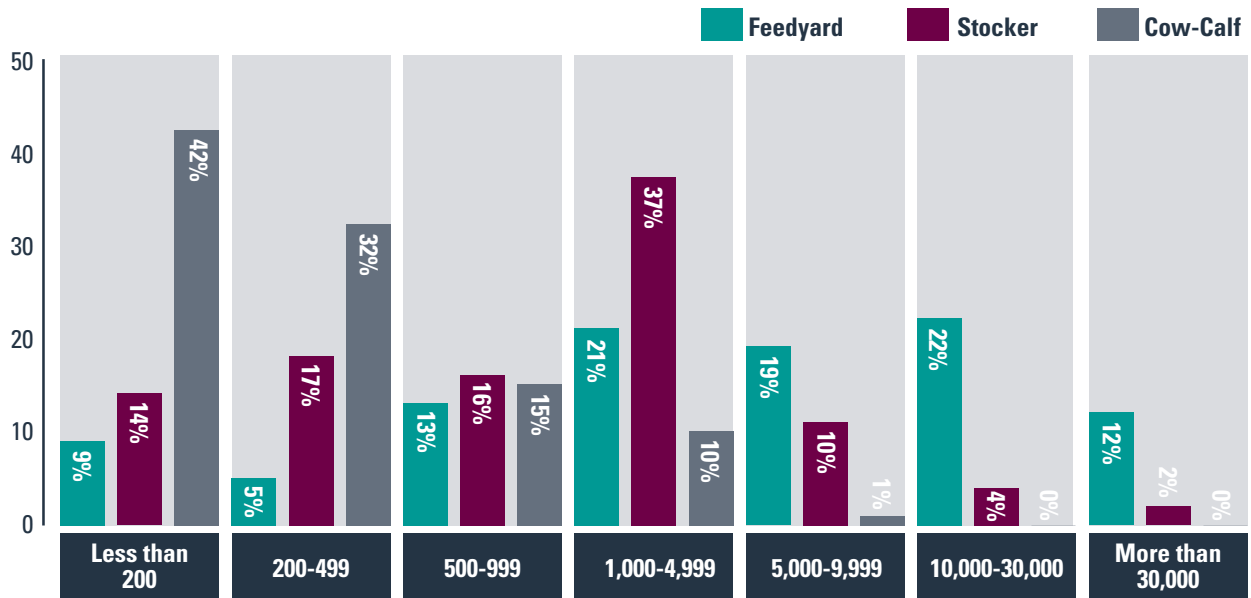
Which of the following best describes you?



Capacity, All Producers



Capacity by PRODUCER Segment



Cow-Calf Capacity (n=353)

42% of cow-calf producers responded with their one-time capacity being less than 200. 32% of the cow-calf respondents reported a capacity of 200-499, 15% reported a capacity of 500-999 and 10% reported a capacity of 1,000-4,999. 1% reported 5,000-9,999. No respondents reported more than 10,000.

Stocker Capacity (n=57)

69% of stocker respondents reported a capacity of 500 or more. 31% reported a capacity of less than 500.

Feedyard Capacity (n=102)

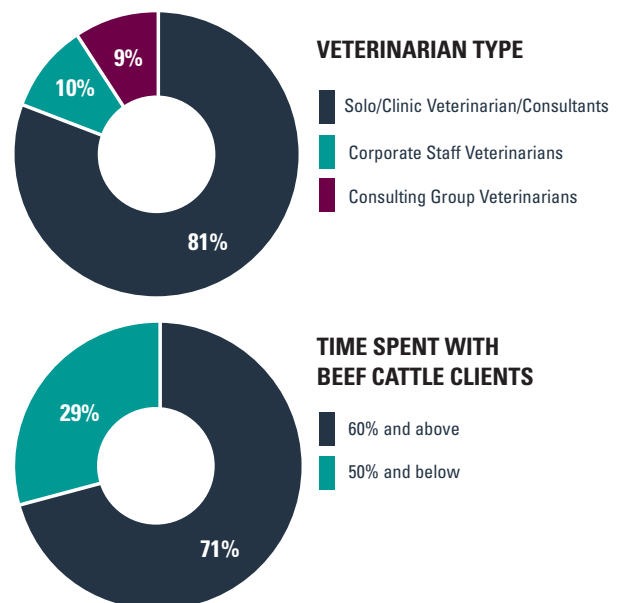
73% of feedyard respondents reported a capacity of more than 1,000 head. 27% reported a capacity of less than 1,000.

VETERINARIAN SEGMENT

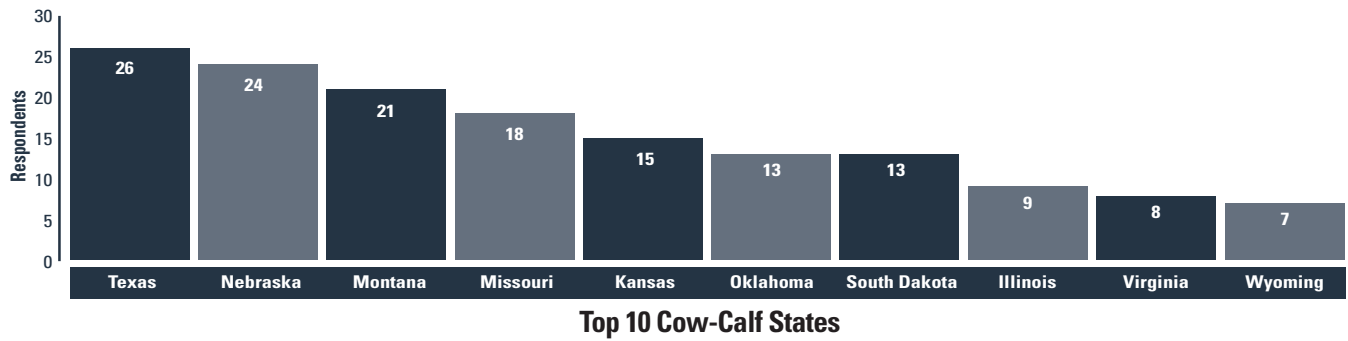
81% of veterinarian respondents identified as solo/clinic veterinarian/consultants. 10% identified as corporate staff veterinarians and 9% as consulting group veterinarians.

What percent of your time is spent working with beef cattle clients?

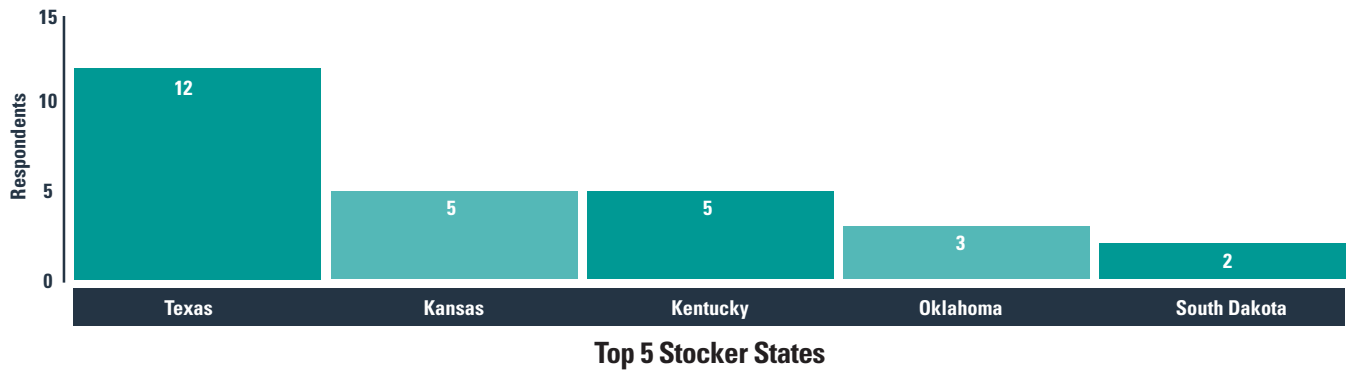
When asked what percentage of time they spent working with beef cattle clients, 71% of veterinarians responded that they spent at least 60% of their time working with beef cattle clients.



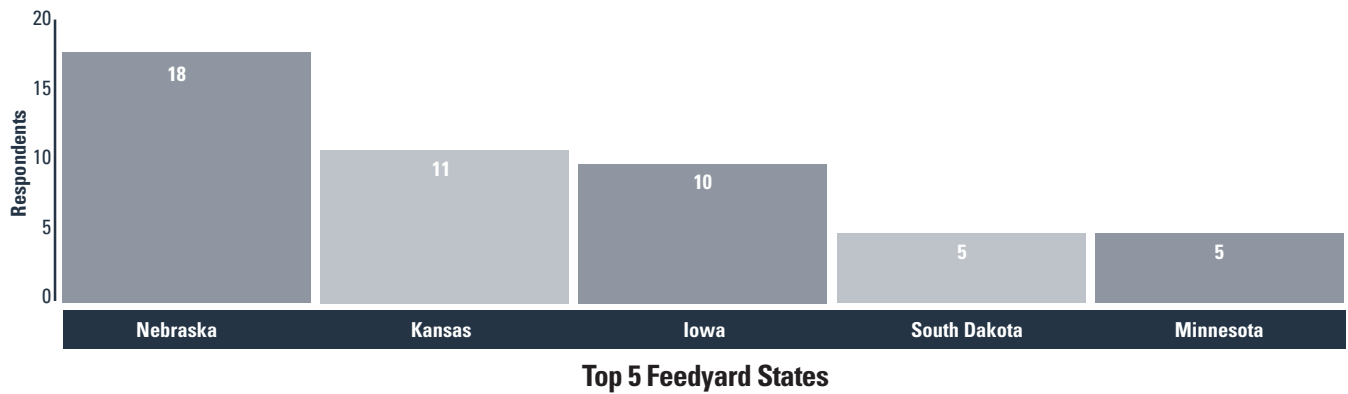
Cow-Calf



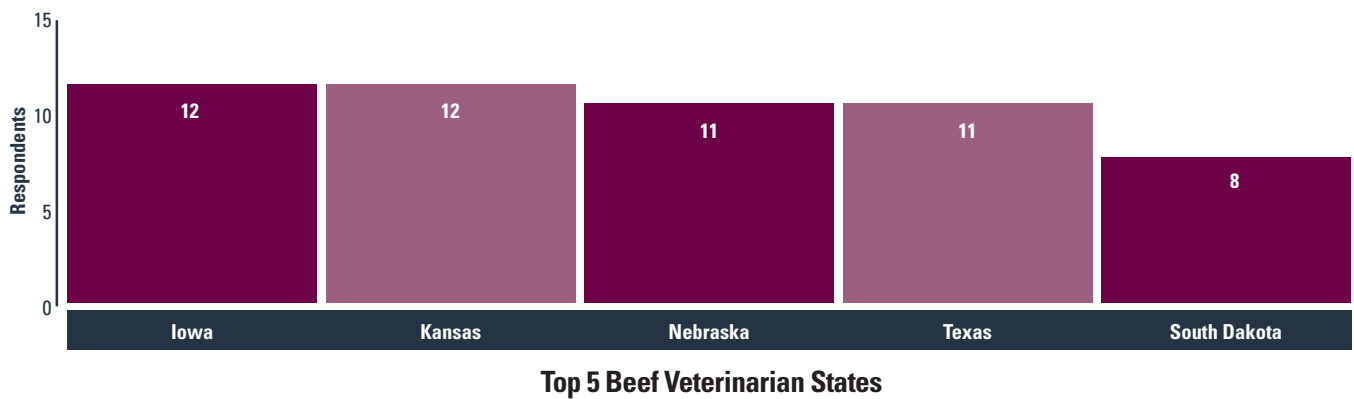
Stocker



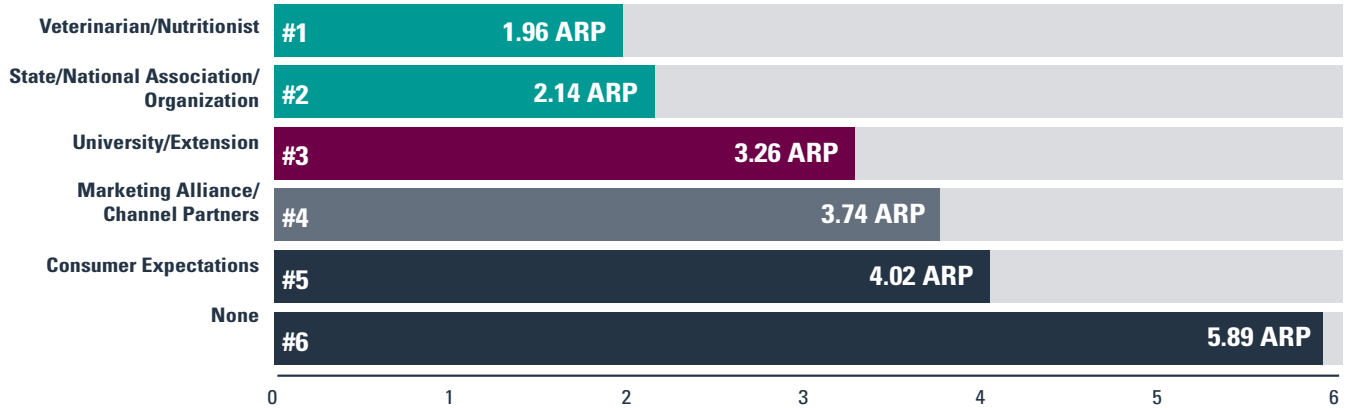
Feedyard



Beef Veterinarian

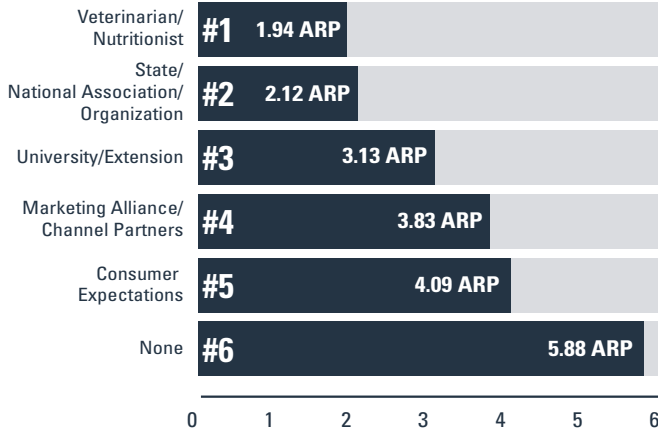


Which of the following influence the guidelines for beef cattle care?

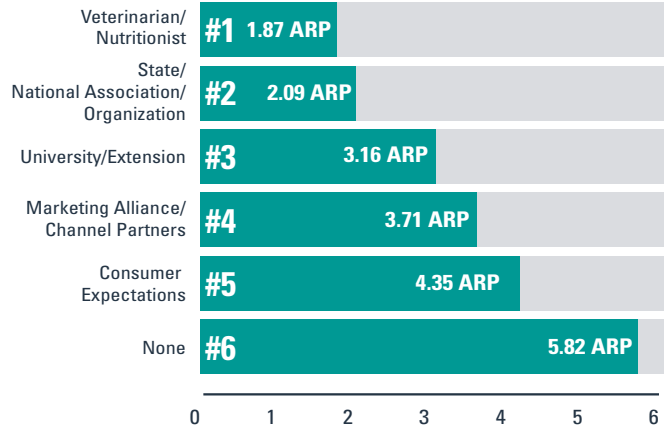


Summary Participants believe veterinarians and nutritionists have the most influence in the beef industry, followed closely by state and national organizations. They ranked the university and Extension segment third, marketing alliance and channel partners fourth, and consumer expectations fifth. A 5.89/6 Average Ranking Position (ARP) represents the “none” group, showing there’s opportunity to promote the role of veterinarians and nutritionists as influencers and an opportunity for MAH to play a leadership role in animal care and well-being.

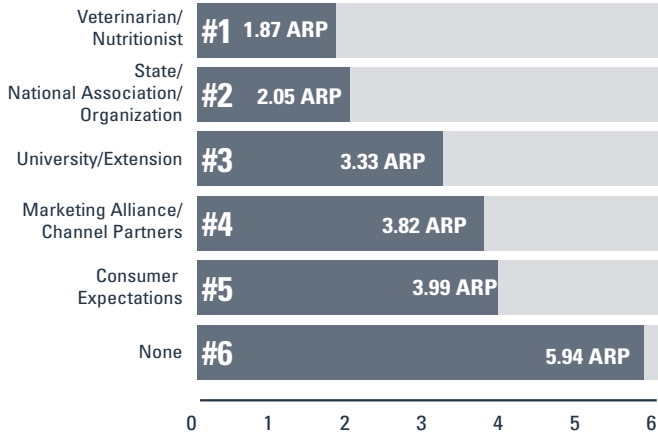
Cow-calf



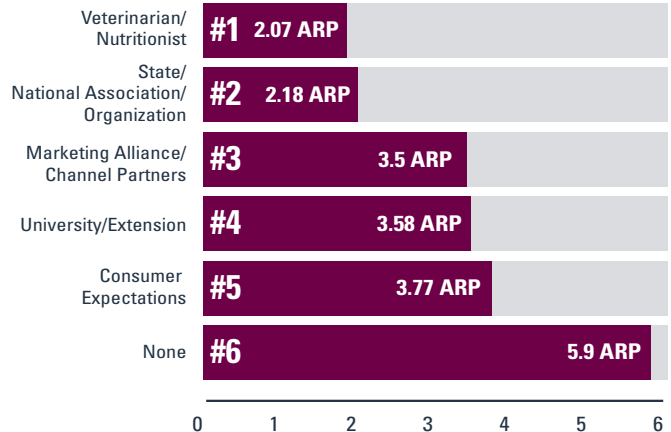
Stocker



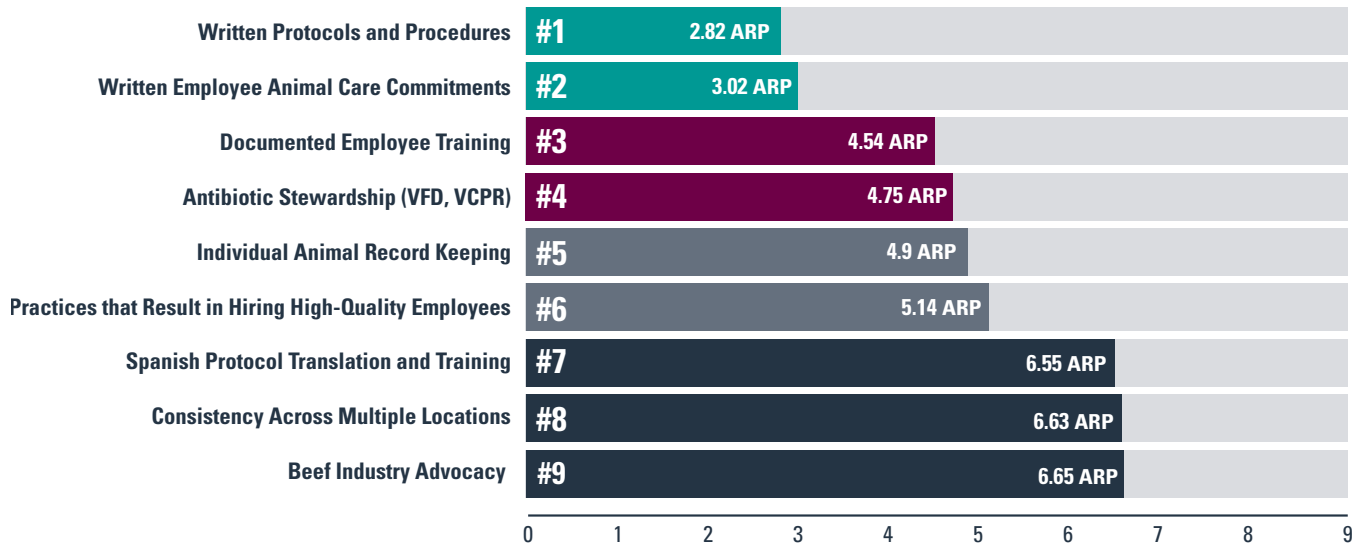
Feedyard



Beef Veterinarian

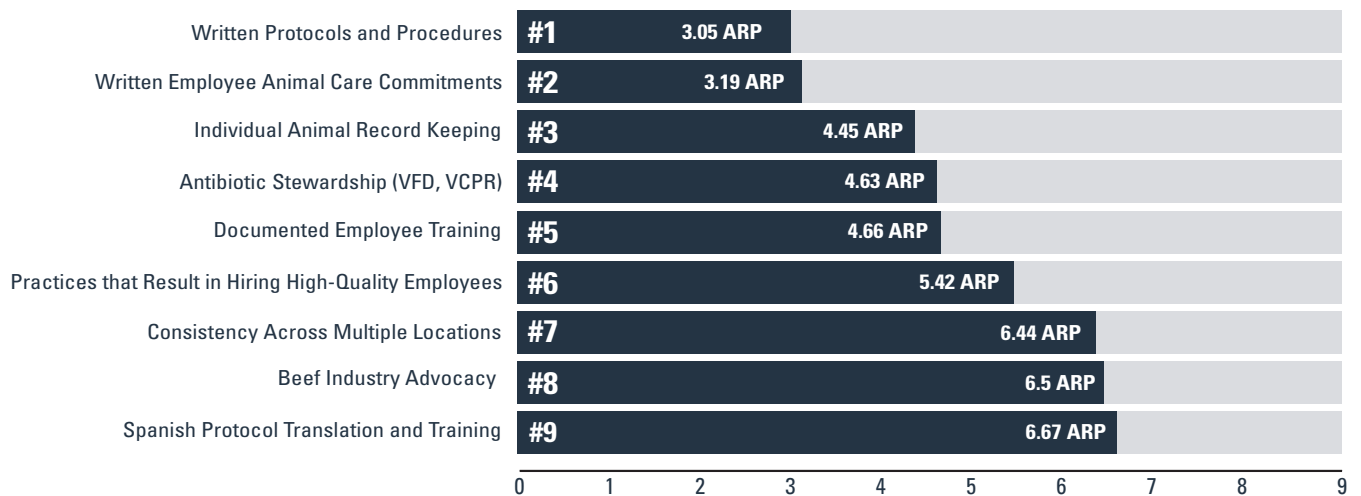


Rank the most important outcomes/resources you need to improve your animal care program.



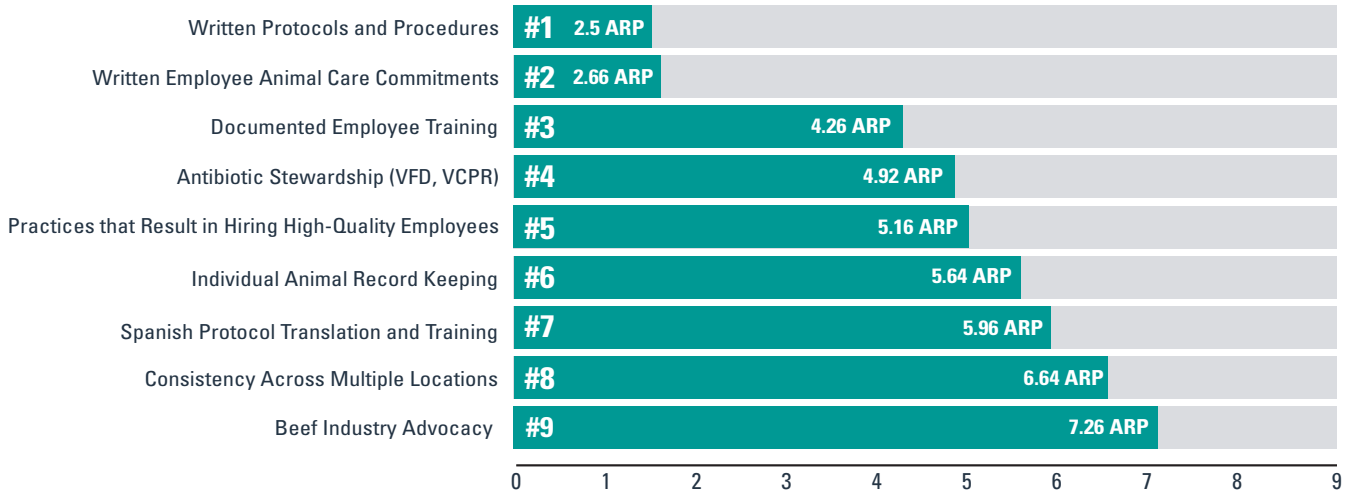
Summary Priorities were closely aligned between the survey classes as three of the four segments ranked written protocols and procedures as the most important resource for improving their animal care program with 2.82/9 ARP. Written employee animal care commitments was second in overall importance, with its highest ranking being a 2.58/9 ARP value for feedyard producers.

Cow-calf

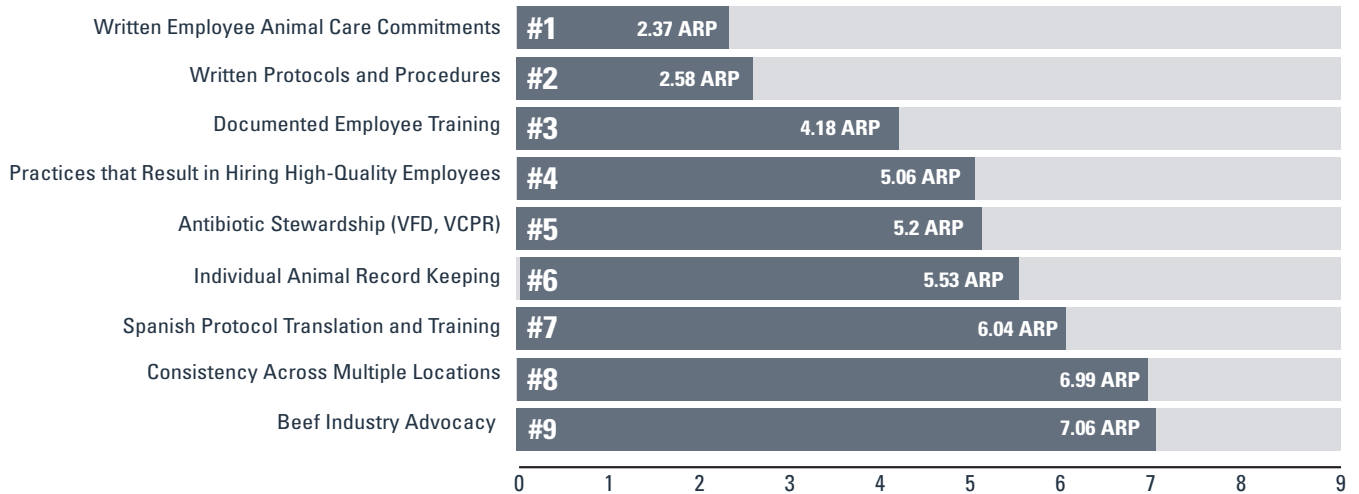


Rank the most important outcomes/resources you need to improve your animal care program. CONTINUED

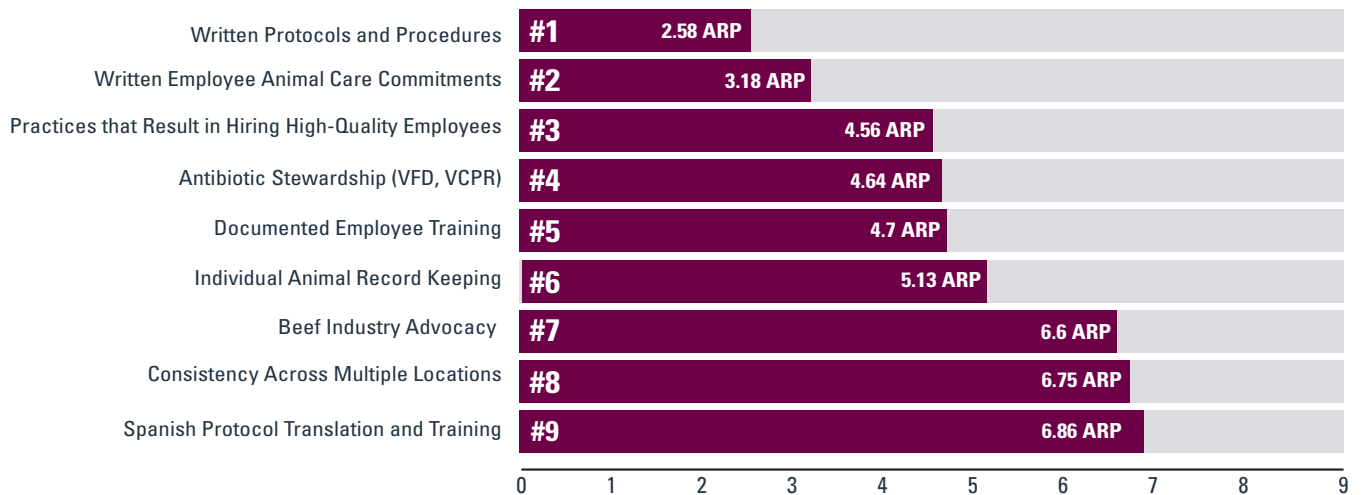
Stocker



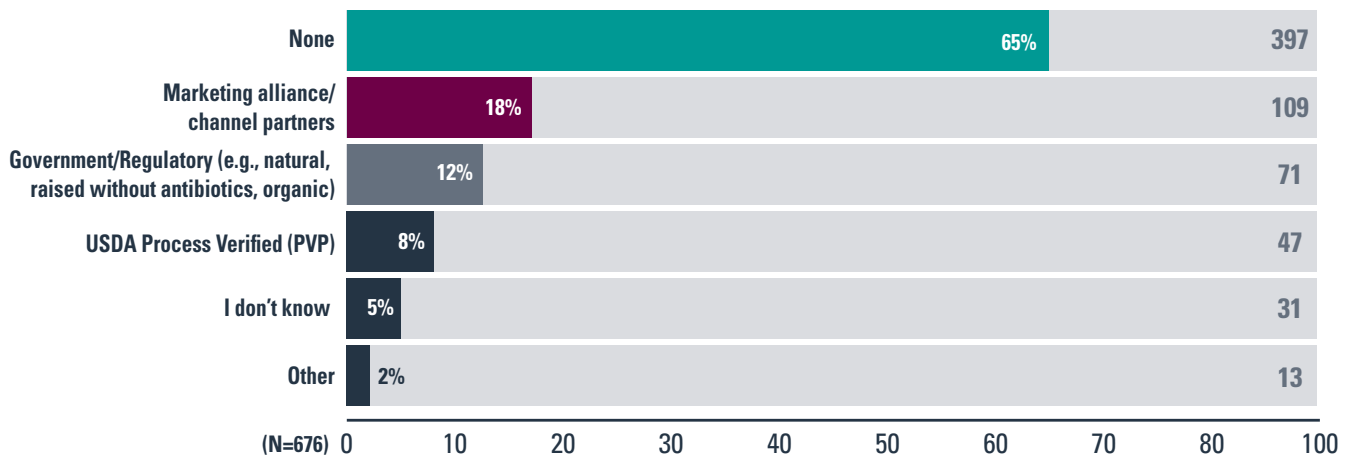
Feedyard



Beef Veterinarian

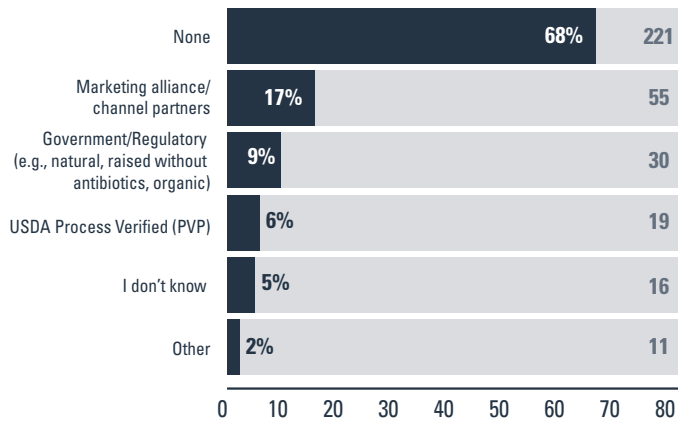


Which of the following third-party certifications have you participated in during the last 12 months?

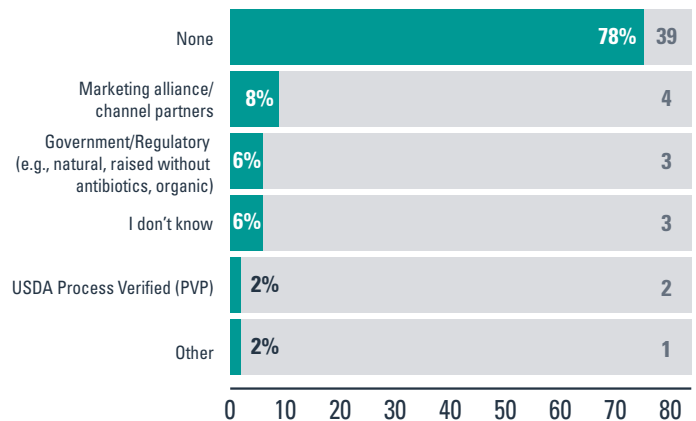


Summary 68% of cow-calf respondents reported that they hadn't participated in any third-party certifications in the last 12 months, compared to the 78% reported in the stocker segment. This statistic is noticeably higher than the 58% reported by the feedyard and beef veterinarian respondents. Other answers reported contained some of the following: Progressive Beef, Beef Continuing Education, PAC Group Training/ Consulting Vets, Purina programs, IMI Global training for value-added programs, Ron Plain seminar at World Beef Expo, and numerous industry publications.

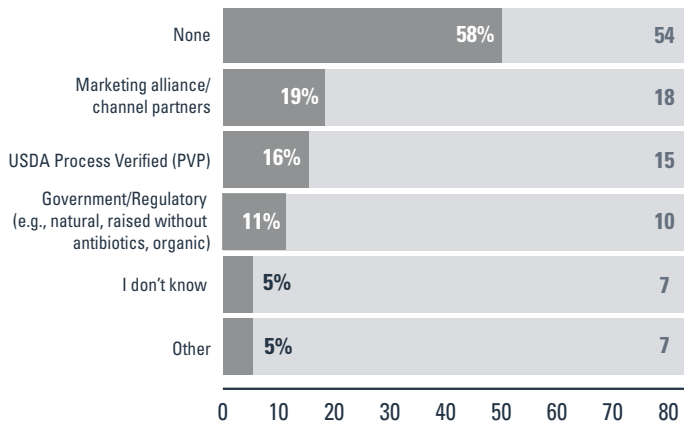
Cow-calf



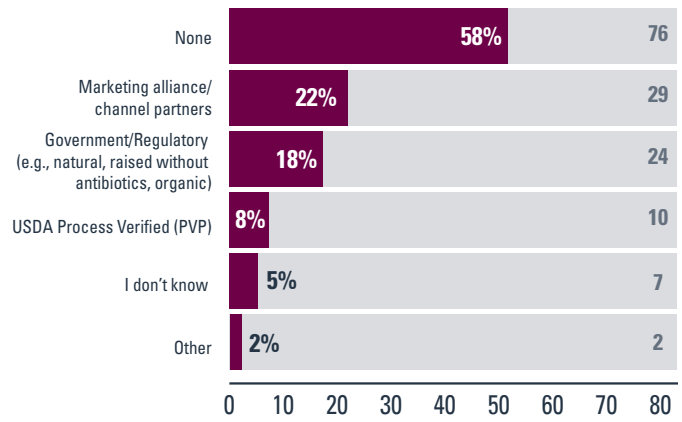
Stocker



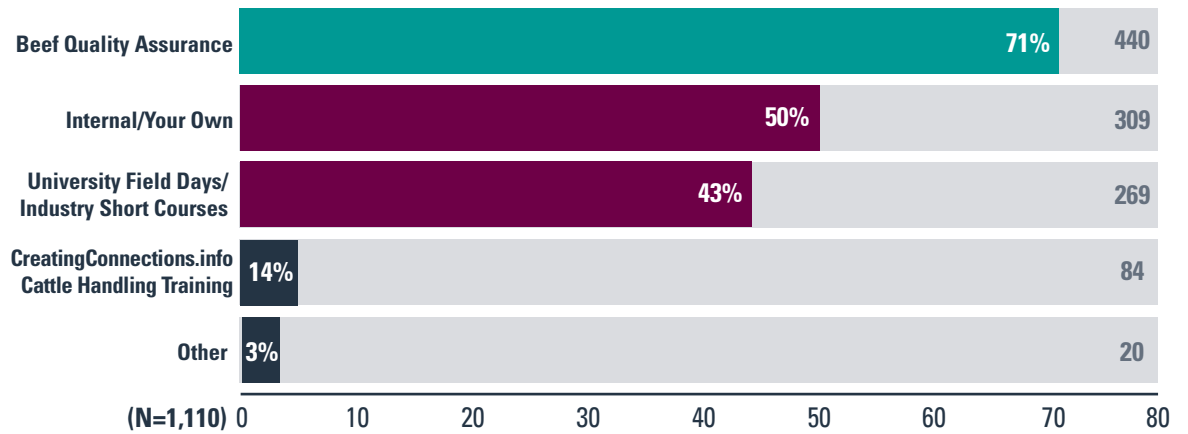
Feedyard



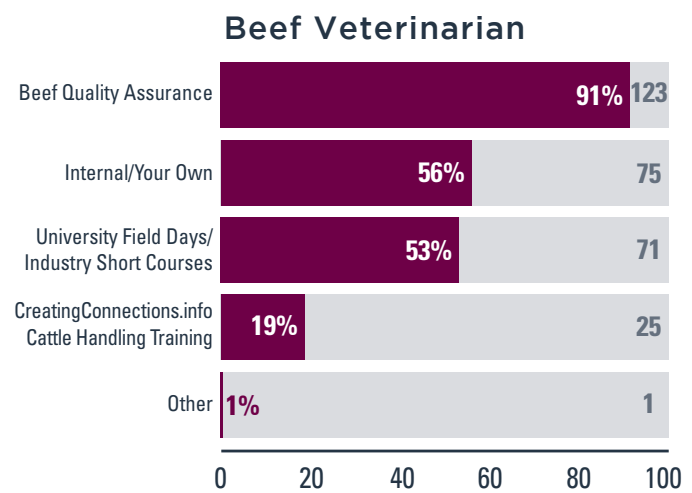
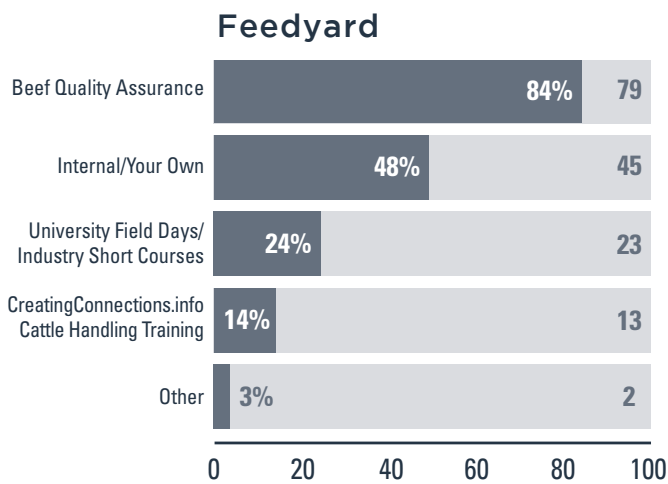
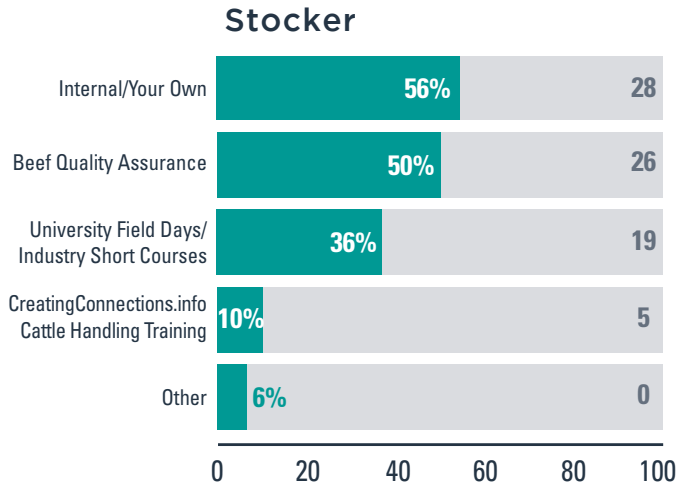
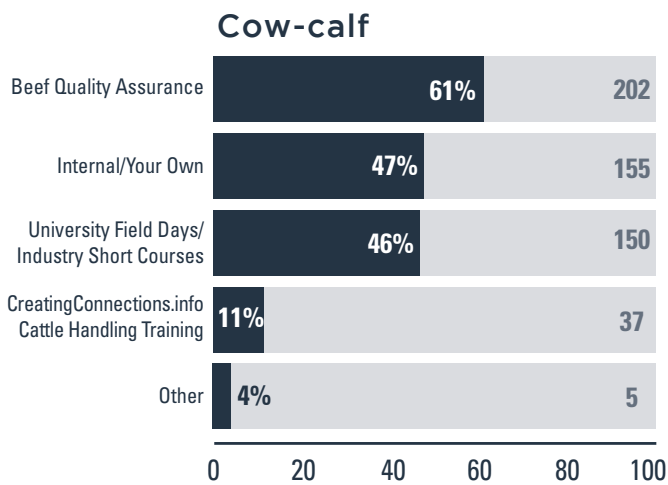
Beef Veterinarian



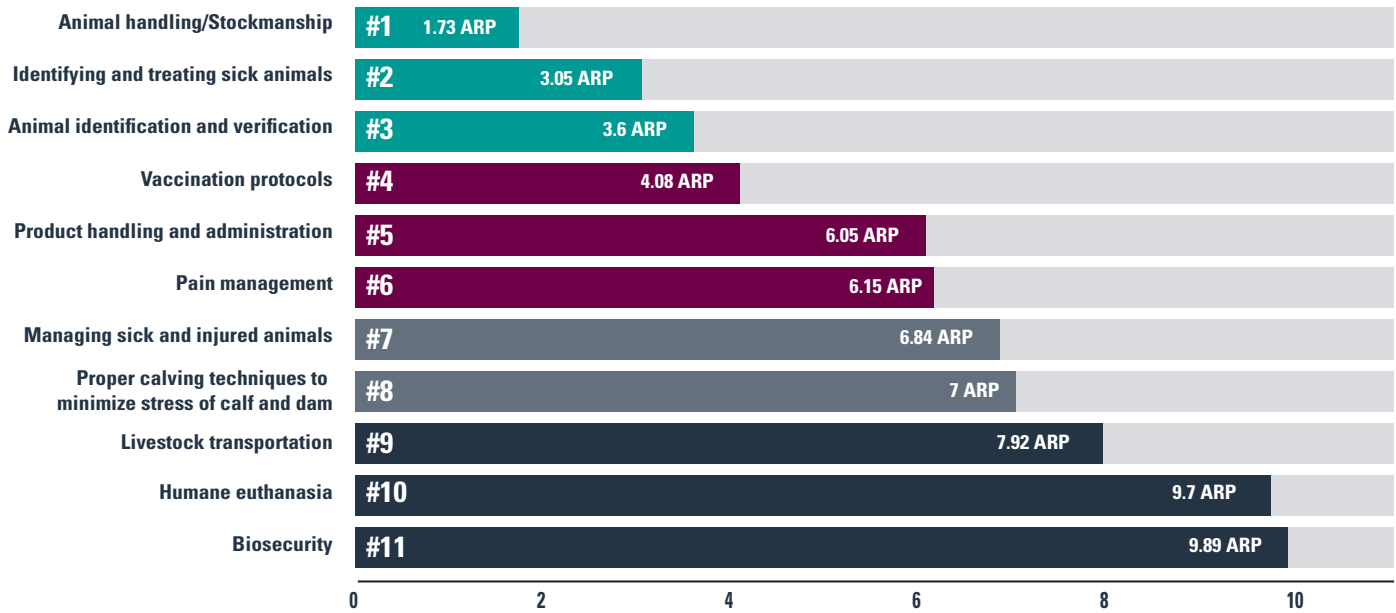
Please indicate if you or your clients/employees have participated in any of the following training programs.



Summary All four target segments ranked Beef Quality Assurance (BQA) or internal training as their next preferred method. University field days and industry short courses ranked third, followed by CreatingConnections.info cattle handling training in fourth. At 1%, the smallest group reported using other methods of training, including: Progressive Beef, NHTC, Tyson Farm Check, VNB, GAP, Purina programs, animal health company CE meetings, age and source verified program, IMI Global/Where Food Comes From, and USDA APHIS Bovine Johne’s Disease Control Program.

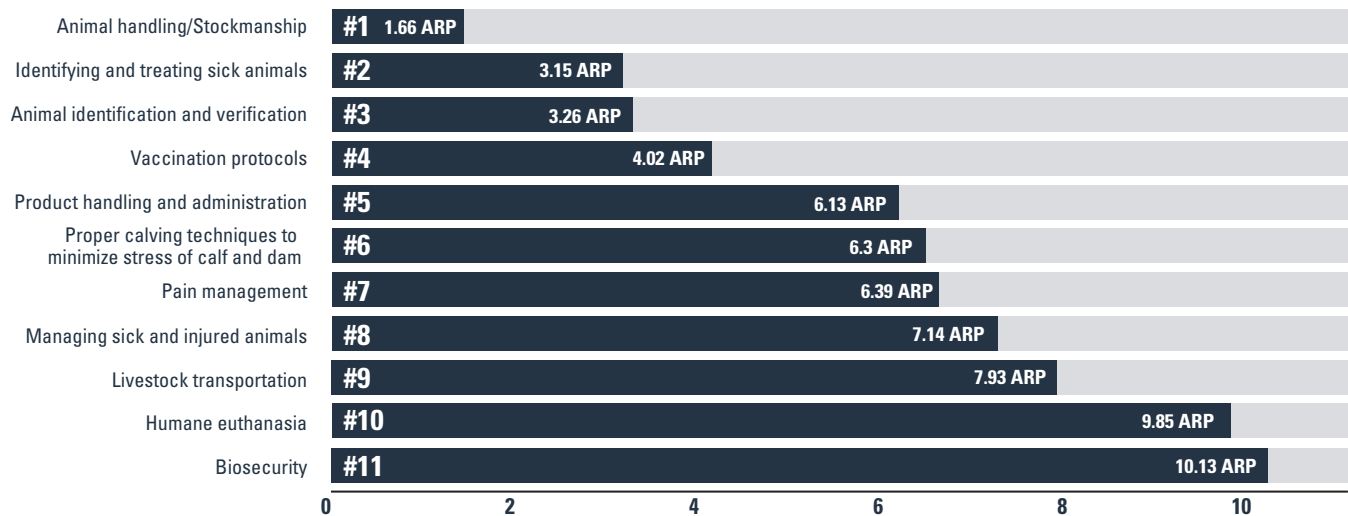


Please rank the training topics that best meet your farm needs regarding animal welfare.



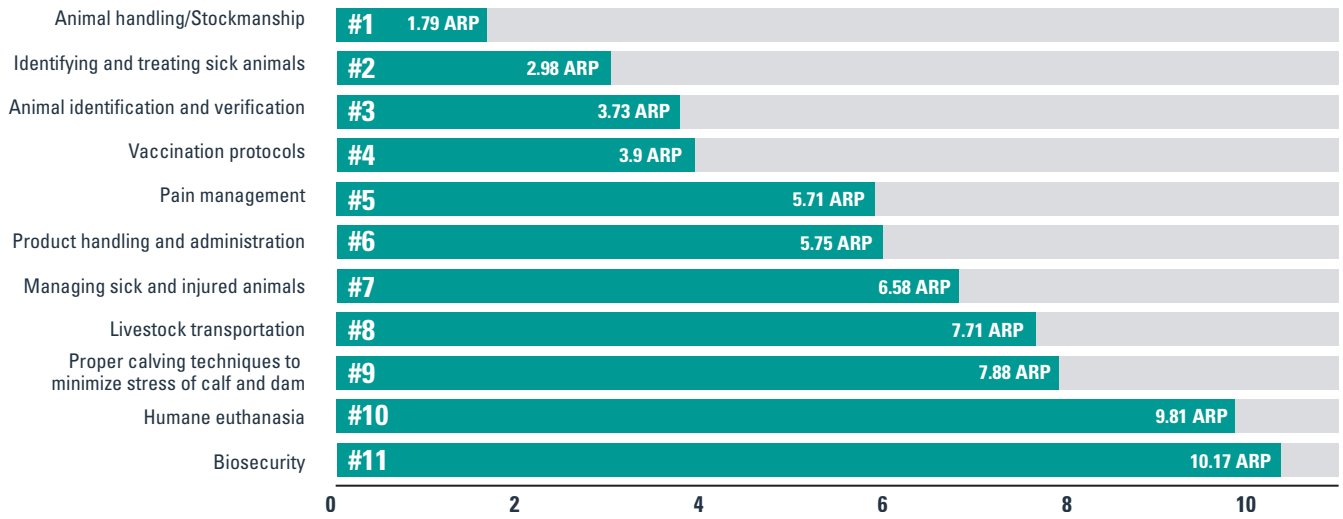
Summary Animal handling and stockmanship, identifying and treating sick animals, animal identification and verification, and vaccination protocols were the top four training topics regarding animal welfare across all target segments. Product handling and administration, and pain management were the next two highest priorities ranking #5 and #6 in the average summary.

Cow-calf

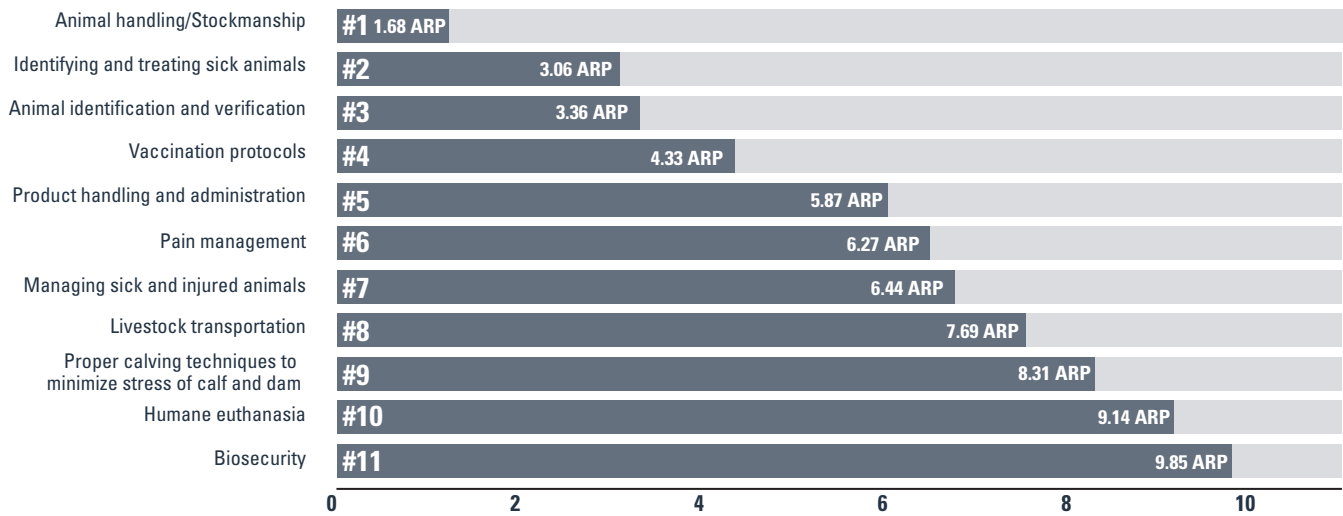


Please rank the training topics that best meet your farm needs regarding animal welfare. CONTINUED

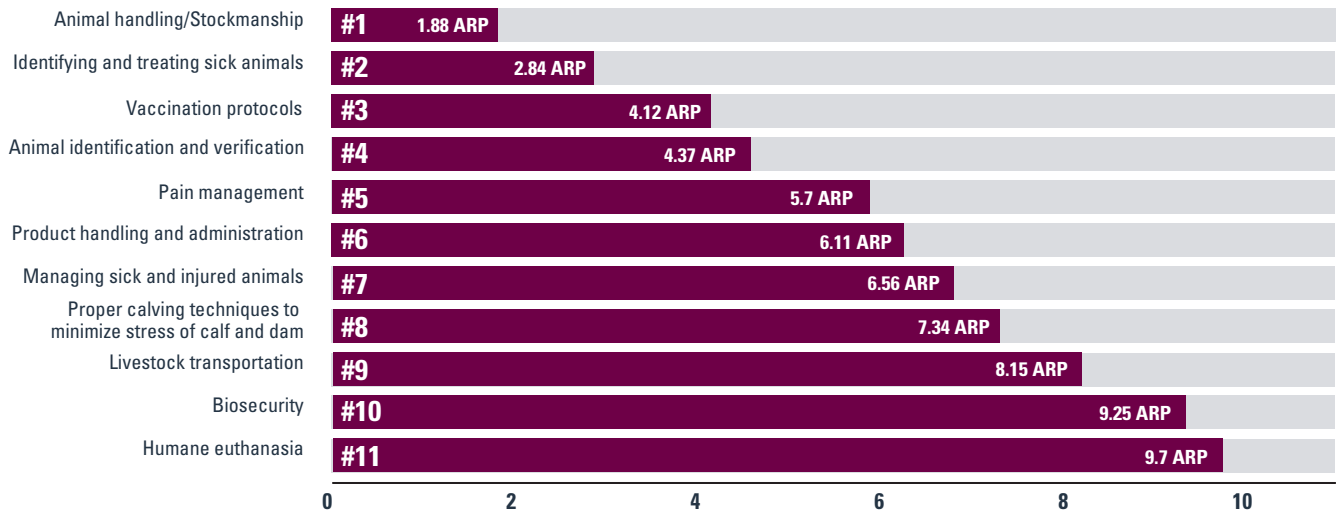
Stocker



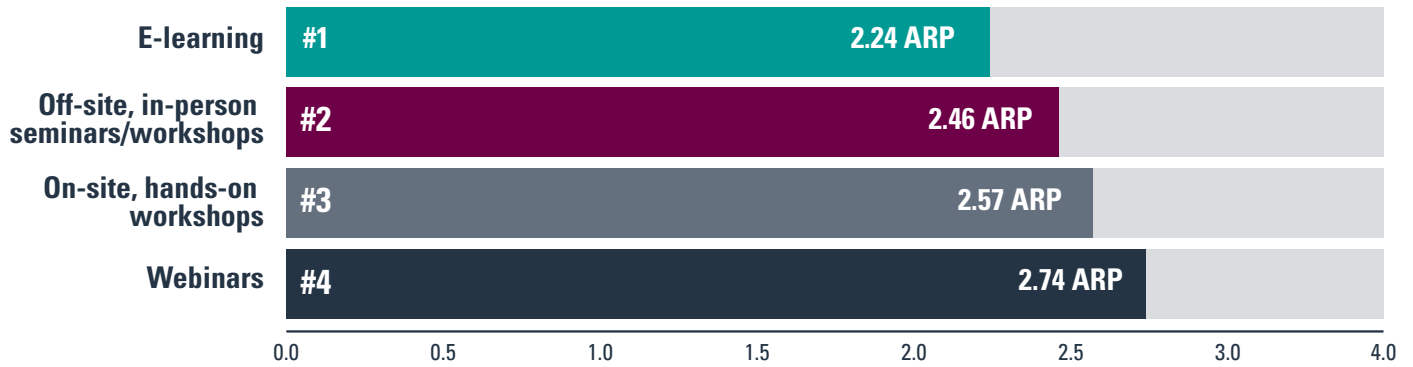
Feedyard



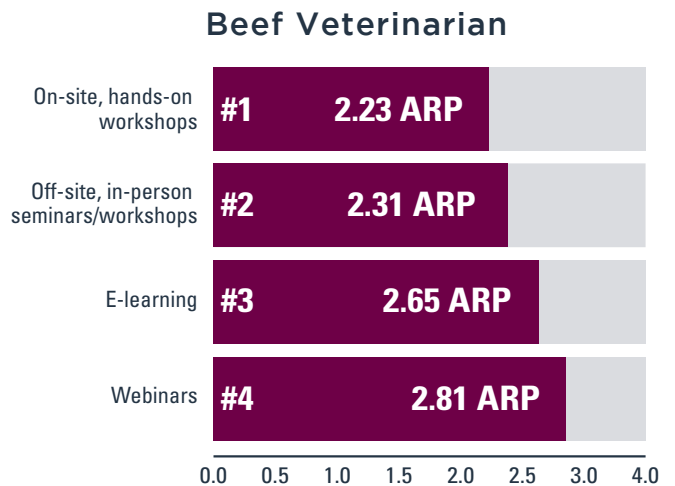
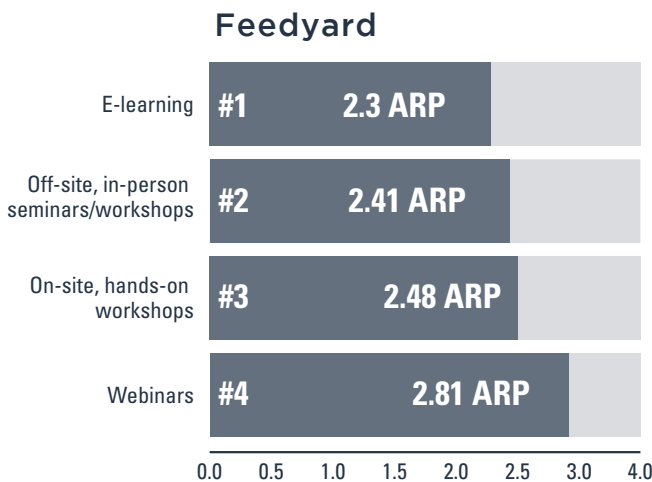
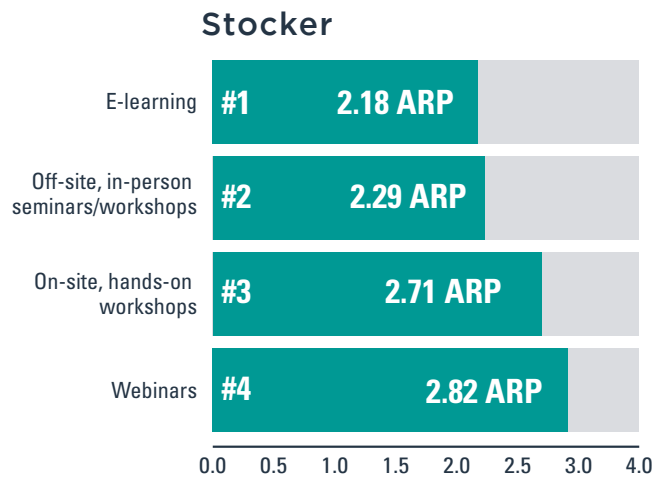
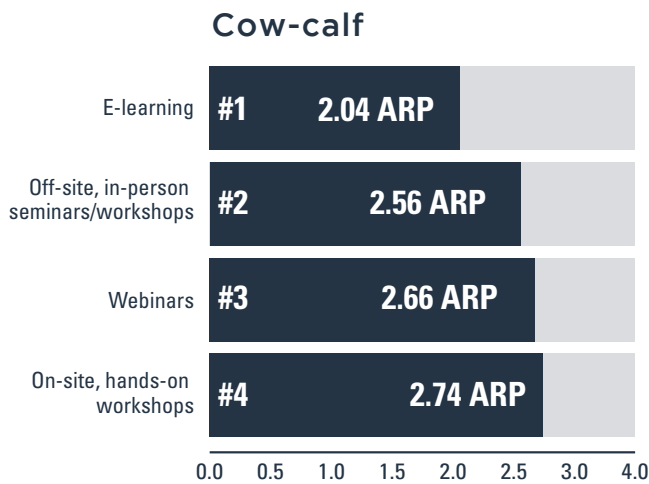
Beef Veterinarian



What are your most preferred means of receiving training and accessing training material?



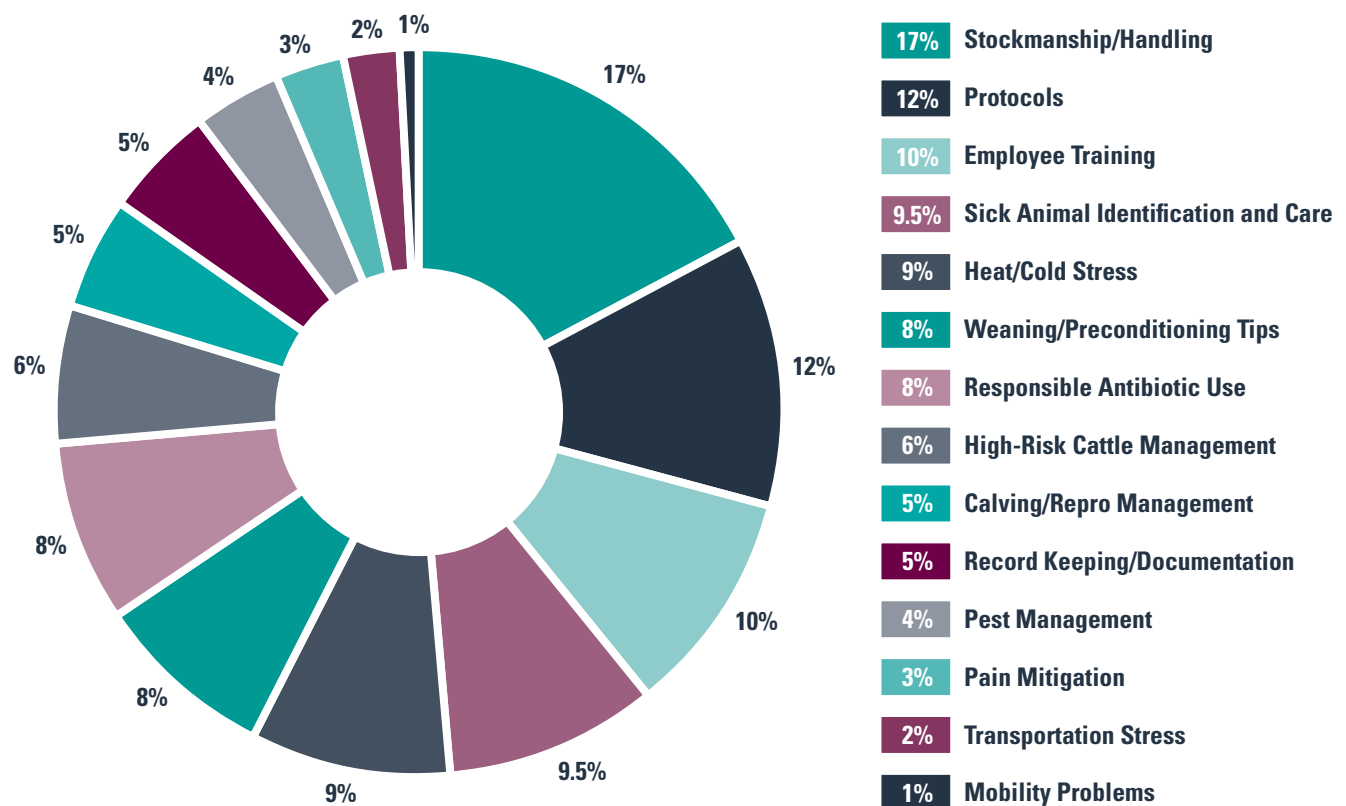
Summary E-learning was a strong first choice for all respondent segments except beef veterinarians who ranked it third with a 2.65/4 ARP. Off-site, in-person seminars and workshops were second, followed closely by on-site, hands-on workshops. Webinars ranked fourth overall, but cow-calf respondents ranked them third within their own segment.



Which industry experts/trainers would you recommend as presenters on topics relating to animal care and welfare?

Which industry experts respondents identified differed significantly by industry segment. Cow-calf producers largely identified veterinarians, as well as BQA trainers as the most frequently recommended experts and trainers on animal care and welfare topics. Stocker operators most frequently recommended university professors and extension specialists. Feedyard operators, beef veterinarians and nutritionists most frequently recommended specific animal welfare experts and consulting veterinarian groups.

Please highlight your needs for improving your cattle welfare program on your operation or with your clients.



Summary Respondents had the opportunity to write in their needs for improving their cattle welfare program. After being condensed and separated into comparable buckets, their responses showed improved stockmanship and handling as their greatest needs, followed by improved protocols, employee training, sick animal identification and care, and heat/cold stress. The need for responsible antibiotic use was tied with that of weaning and preconditioning tips, then followed by a need for high-risk cattle management, record keeping and documentation, pest management, pain mitigation, transportation stress, and lastly, mobility problems. Some answers that were frequent but not recorded in the graph are BQA training and resources, improved nutrition programs and industry transparency.

Survey Conclusions and Key Findings

The survey revealed several insights, in addition to the specific survey question feedback, that help to give a clearer perspective of the industry and its needs:

1. Those who influence and serve as resources for animal care and welfare were identified to be veterinarians, university/Extension and associations such as National Cattlemen's Beef Association.
2. An overwhelming majority of respondents had not participated in third-party certification programs in the last 12 months although a large percentage stated they had completed some type of training in the past.
3. Relevant animal care and welfare needs that were highlighted included animal handling and stockmanship, handling facility design, identification and care of sick animals, pain mitigation and employee training. Survey results reflect those in beef production channels need targeted information on animal care. Written protocols and procedures were the No. 1 ranked needed resource, and animal handling was the top-ranked topic in which participants said they desire more training.
4. Meeting the specific needs of these producers, veterinarians and nutritionists is not a one-size-fits-all solution. Beginning with employee training resources, continuing with handling facility design and stockmanship training, and following up with record-keeping and verification resources would be beneficial when catered to different industry segments and the individual needs of operation sizes.
5. Participants ranked eLearning as their most preferred means of receiving additional training as it allows them the flexibility they need to access materials that will improve the animal health goals of their farm or ranch. Making these kinds of learning modules available to all segments in beef production would help them solve the challenges they face.

With a better understanding of the gaps and needs facing beef cattle producers, stocker and feedyard operators, and veterinarians related to cattle care and welfare, Merck Animal Health can better equip the industry with the necessary tools and resources to accomplish successful cattle care and welfare programs. The end result will be animals that are better cared for, operations that are stronger and an environment that is healthier.

