

Public Perception of the Dairy Industry and Trust in Dairy Farmers



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Introduction

- The U.S. has the most productive, safe, economic food system in the world, Yet today, there are many who have concerns...
- Americans are vitally concerned about the safety of their food supply. Agriculture is likewise concerned about the safety of its products. In fact, the agricultural community agrees that, along with the environment, diet/health, and animal welfare, food safety is a major issue as we approach the 21st century.

Harlan Ritchie –

- **December 1995**
- As an industry, we don't we do research. But we



Consumer Concerns & Perceptions

All of the Most Concerning Life Issues are Beyond the Consumer's Direct Control

Consumer Issues



Women were more concerned about most issues than men

Additional Food System Concerns*

- Imported Food Safety (63%)
- Food Safety (63%)
- Enough to Feed U.S. (56%)
- Humane Treatment of Farm Animals (51%)
- Environmental Sustainability in Farming (49%)
- Access to Accurate Info to Make Healthy Food Choices (48%)

Early Adopters

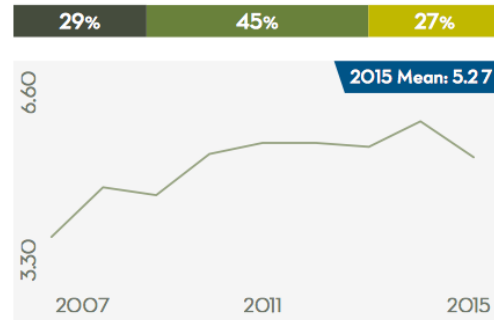
Earlier adopters were more concerned about all issues than later adopters



*Top Box ratings (8-10)

"I don't care where my food was produced as long as it is affordable, safe and wholesome."

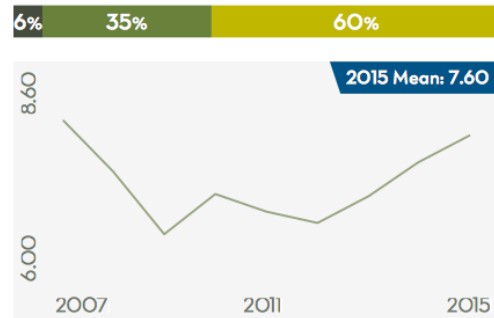
Fewer than **1 in 3** strongly agree



More people strongly disagree than strongly agree, reflecting that people are increasingly concerned about where their food is produced.

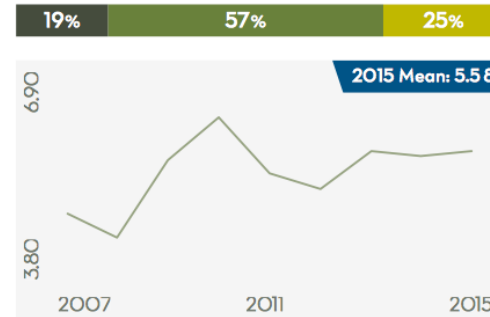
"If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs."

Nearly **2 in 3** strongly agree



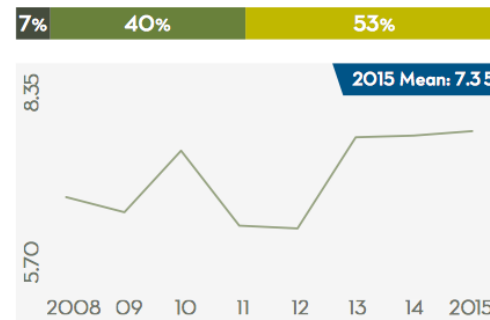
"U.S. meat is derived from humanely treated animals."

Only **1 in 4** strongly agree



"I would support a law in my state to ensure the humane treatment of farm animals."

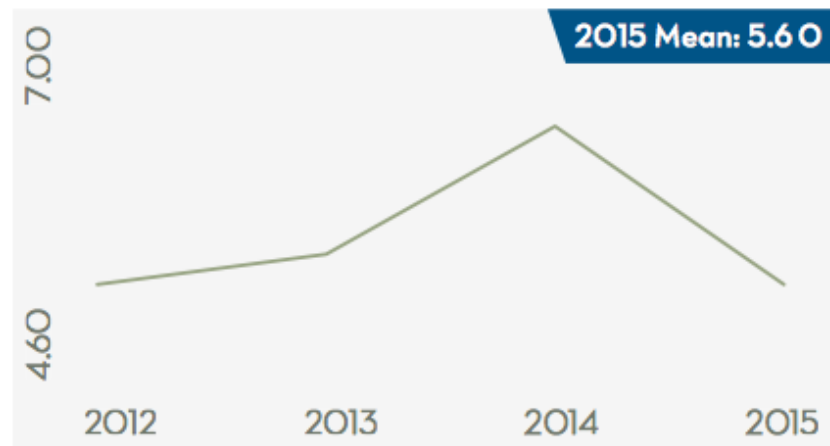
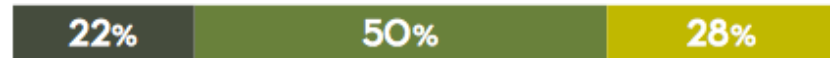
Over **half** strongly agree



Support for eating meat, milk and eggs from animals treated decently and humanely is at a seven-year high with 60 percent of consumers strongly agreeing. The five-percent increase in strong agreement from last year is significant. But it is problematic that only 25 percent of consumers strongly agree that meat in the U.S. actually comes from humanely treated animals and that more than half would support a law in their state to ensure humane treatment of farm animals.

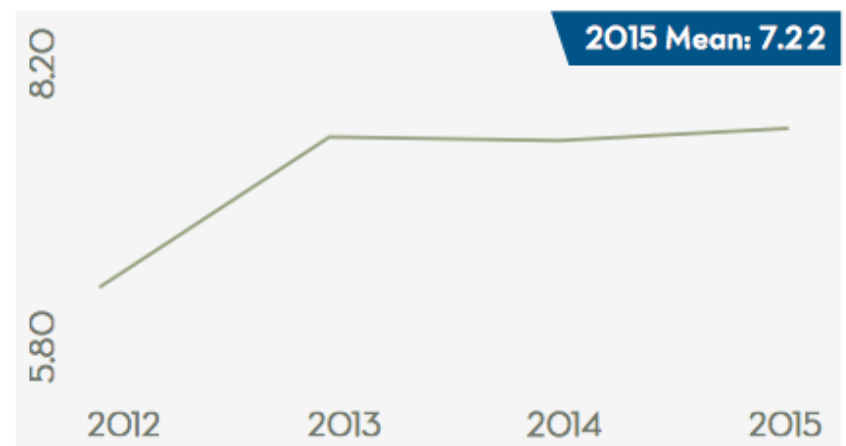
"Family farms are likely to put their interests ahead of my interests."

50% only moderately agree



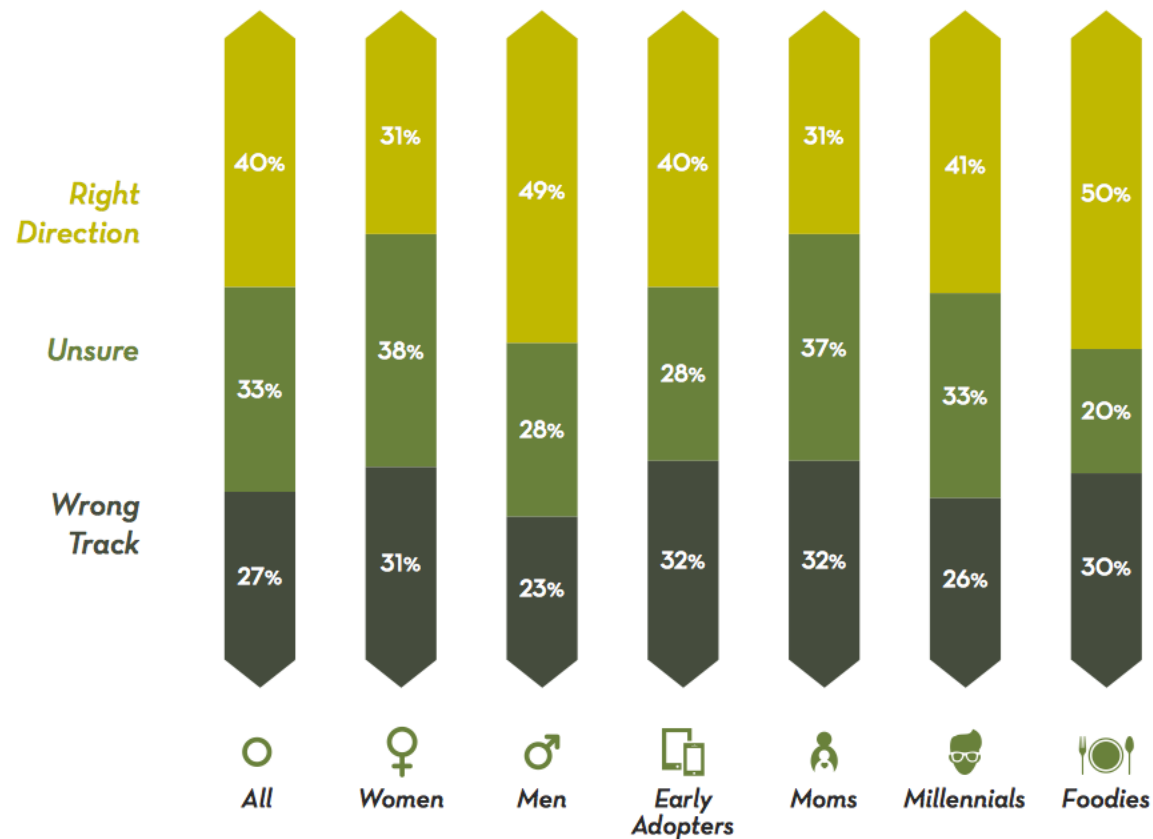
"Commercial farms are likely to put their interests ahead of my interests."

Half strongly agree



The "big is bad" mindset is still strong among consumers. Only one-fourth think family farms are likely to put their interests ahead of the public compared to half who feel that way about commercial farms. The survey shows similar trends when comparing small food companies with big food companies, small farms with large farms, and local food companies with national food companies.

IS THE U.S. FOOD SYSTEM
HEADED IN THE RIGHT DIRECTION
 OR **DOWN THE WRONG TRACK?**



Source: Center for Food Integrity – 2015 Consumer Trust Research

Producers Concerns

Industry issues rated as “Important” or “Very Important” by dairy farmers

Important+ Very Important (%)

Ensure continuation of Right to Farm program	94
New dairy products to increase milk utilization	87
Increase dairy product promotion activities and education, especially targeted to youth	78
Developing & improving management techniques to prevent disease thus reducing antibiotic use	71
Improving production efficiencies	70
Availability of farm labor	66

Source: Ted Ferris - 2015 Dairy Industry Survey part 1

Producer Concerns About Public Perceptions rated “Important” or “Very Important”	Important+ Very Important
Communicate to consumers about safety of milk products and technologies used	90
Consumer trust in modern dairy production methods	90
Improving public understanding of animal welfare	88
Consumer trust that dairy products are safe to consume, free of antibiotics and “harmful” hormones.	87
Continue efforts to educate consumers about modern food production	86
Work with government on enforcing milk labeling laws and addressing mis-advertising of milk and non-milk products	85
Public image of agriculture	85
Consumer interpretation of dairy product labels, e.g., hormone-free, etc.	77
Consumers’ acceptance of production technologies, e.g., rBST, antibiotics	73
Consumer/public acceptance of scientific information	69
Develop reliable measures of sustainability for energy, environment and animal care	56
Survey what consumers think about food products and the way they are produced	50

Source: Ted Ferris- 2015 Dairy Industry Survey part 1

BOTF Objectives

- To educate the general public about modern food production
 - Rebuild public trust
 - Use educational stations and trained volunteers
 - Engage the community in the events
(200-400 Volunteers)
- Access educational farm tour impact on consumer trust in
 - animal care
 - food safety
 - modern food production



Participant Numbers

- 2009- Inaugural event in Clinton County: 1,500 attended
- 7 year total:
- 34 Farms
 - 26 Dairy, 3 Beef, 1 Crop;
1 Apple orchard
- **74,740 Participants**
 - Largest attendance 3300+
 - Average 2198 participants/event
- 2015 dairy events in Ohio and Vermont



3 Key Messages

- Farmers take care of their animals
- Farmers are good stewards of the environment
- Farmers produce safe, wholesome and nutritious food



Educational, self-guided tour with volunteers at each station



Exit Surveys

Assess the Impact
of
Educational Farm Tours



Who Comes to BOTF?

2010-11 Exit surveys (N=1,567)

- 44% had not been on working dairy farm in the past 20 years
- 21% on a dairy farm 1-2 times
- 33% 1-5 times



Participants Who Came with Concerns

- 50.9% came to support agriculture
- 12.6% had concerns about environmental impact of dairy farms
- 15.1% had concerns about food production methods
- 11.9% had concerns about animal welfare
 - 20% in support of agriculture had concerns with food production, animal welfare and environment.
 - Of those who came with concerns about food production methods, 48.6% were 1st-time visitors to a dairy farm



Changing ***IMPRESSIONS***



Increasing Understanding and Changing Impressions on Dairy Farms: 1st-time visitors vs. All visitors

		Respondent rating					Number
Statement	Group	Strongly disagree	2	3	4	Strongly agree	
I have better understanding of modern dairy production	ALL	.8%	.5%	5.0%	18.4%	75.4%	1534
	1st Visit	1.6%	.2%	4.5%	15.1%	78.7%	642
My impression of modern dairy farming has improved	ALL	1.1%	1.0%	6.3%	18.7%	73.0%	1522
	1st Visit	1.7%	.8%	5.0%	15.1%	77.3%	635

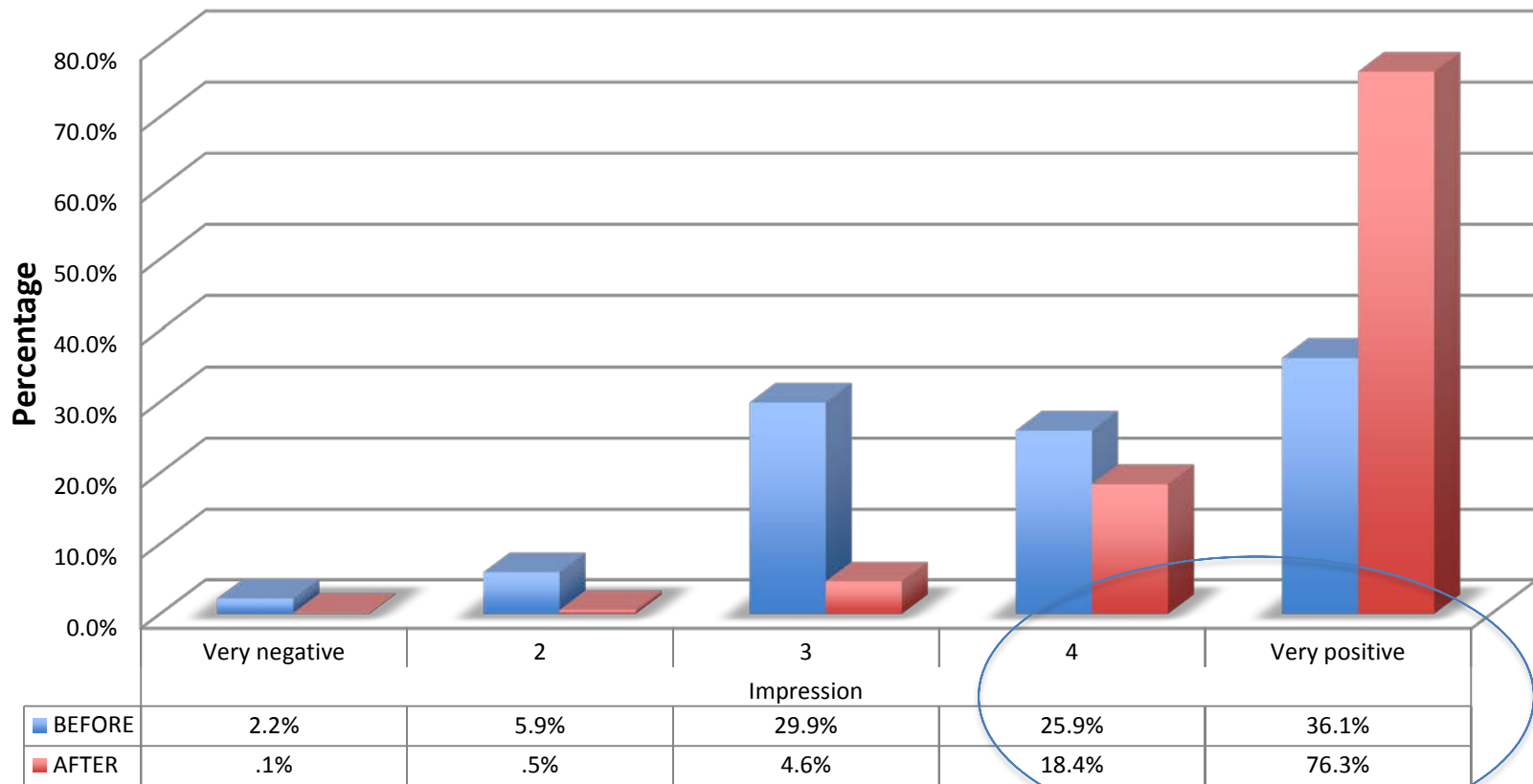
2010-11 data

Impressions BEFORE and AFTER Tour for:

- How farmers care for the environment
- How farmers treat food-producing animals
- The steps to safeguard milk
- Housing provided for dairy animals
 - Responses were similar for all 4
 - Housing tends to have largest shift



Impression about housing provided for dairy animals- All Visitors (N=1472; 2010-2011 Surveys)

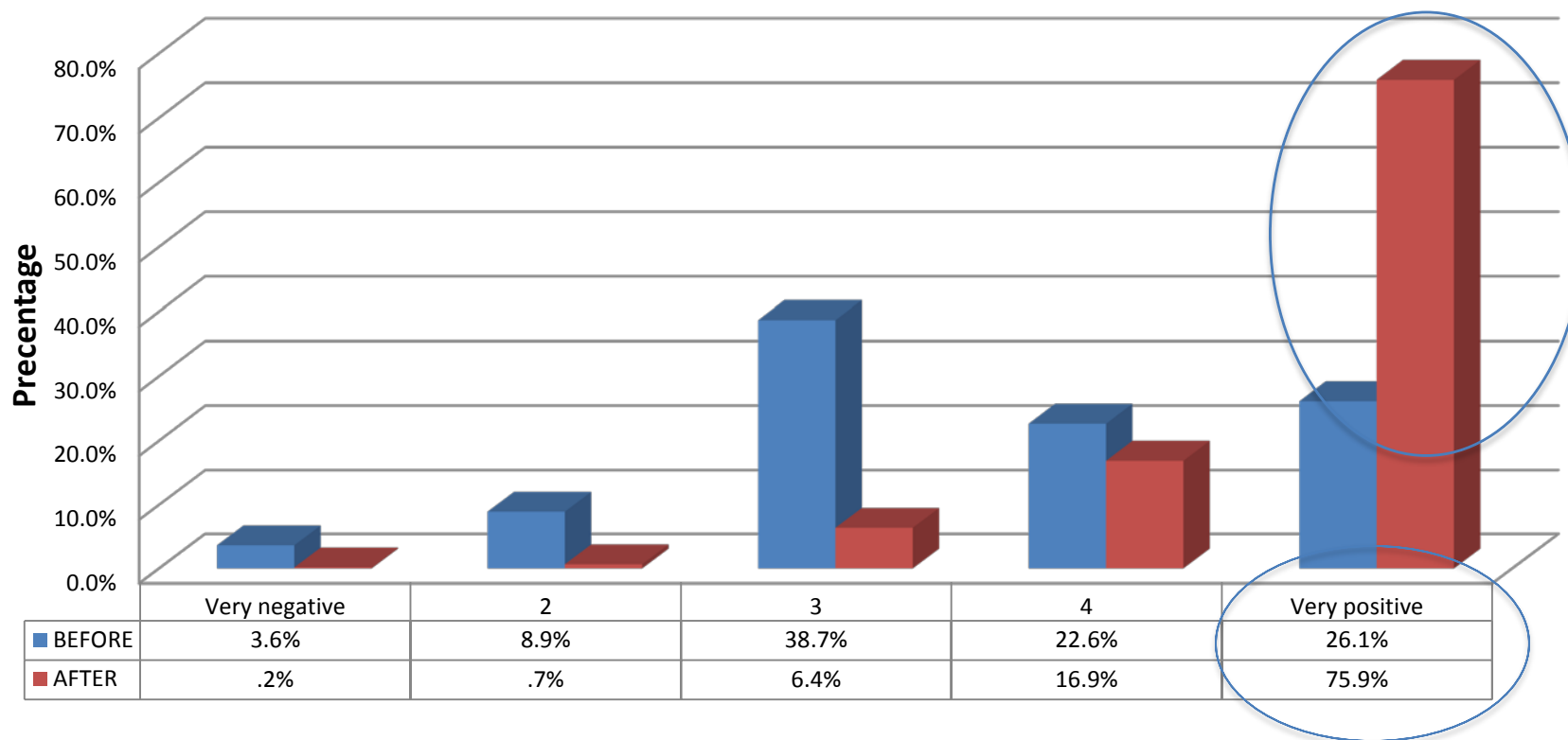


ALL visitors

BEFORE: 26% and 36% were Positive and Very Positive - (62%)

AFTER: 18% and 76% were Positive and Very Positive- (95%)

Impressions about Housing provided for dairy animals – 1st-time visitors (N=610; 2010-2011 Surveys)

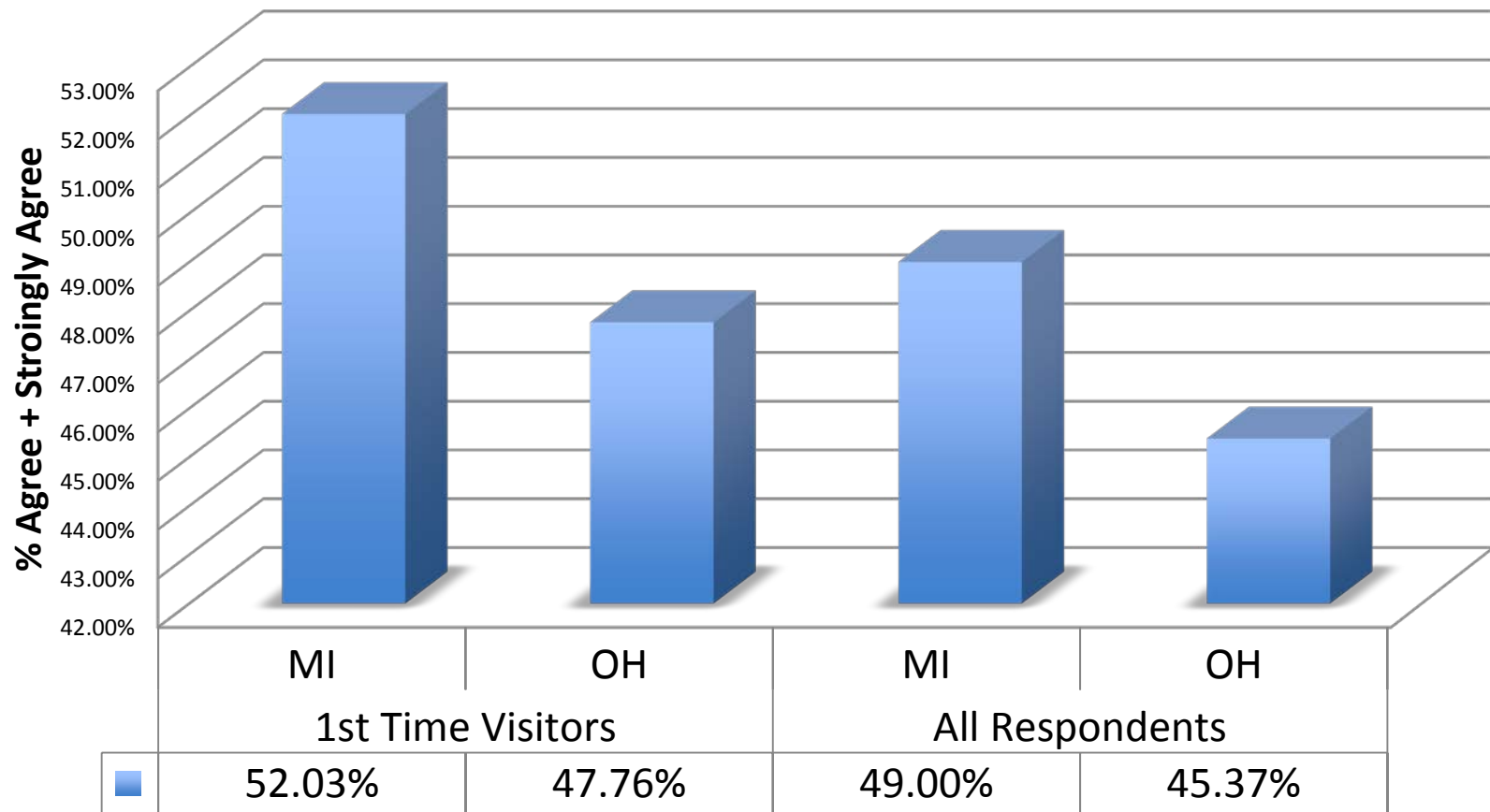


1st-time visitors

BEFORE: 23% and **26%** were Positive and Very Positive - (49%)

AFTER: 17% and **76%** were Positive and Very Positive - (93%)

As a result of the farm tour, I am more comfortable with how genetically modified crops are used on a modern farm?



Source: Ted Ferris, MSU Department of Animal Science- 2015 Dairy Farm event data

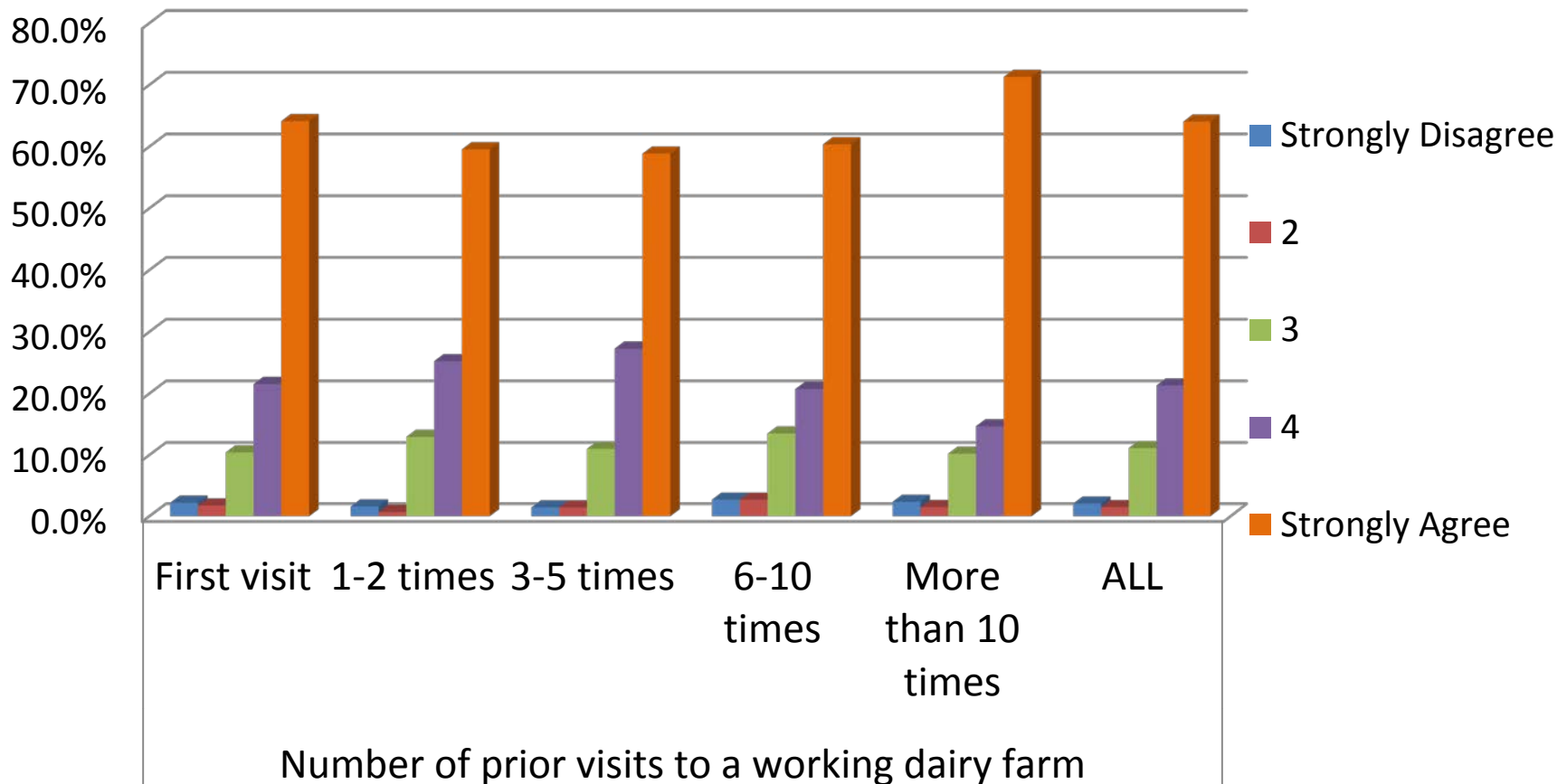


Increasing public ***TRUST***



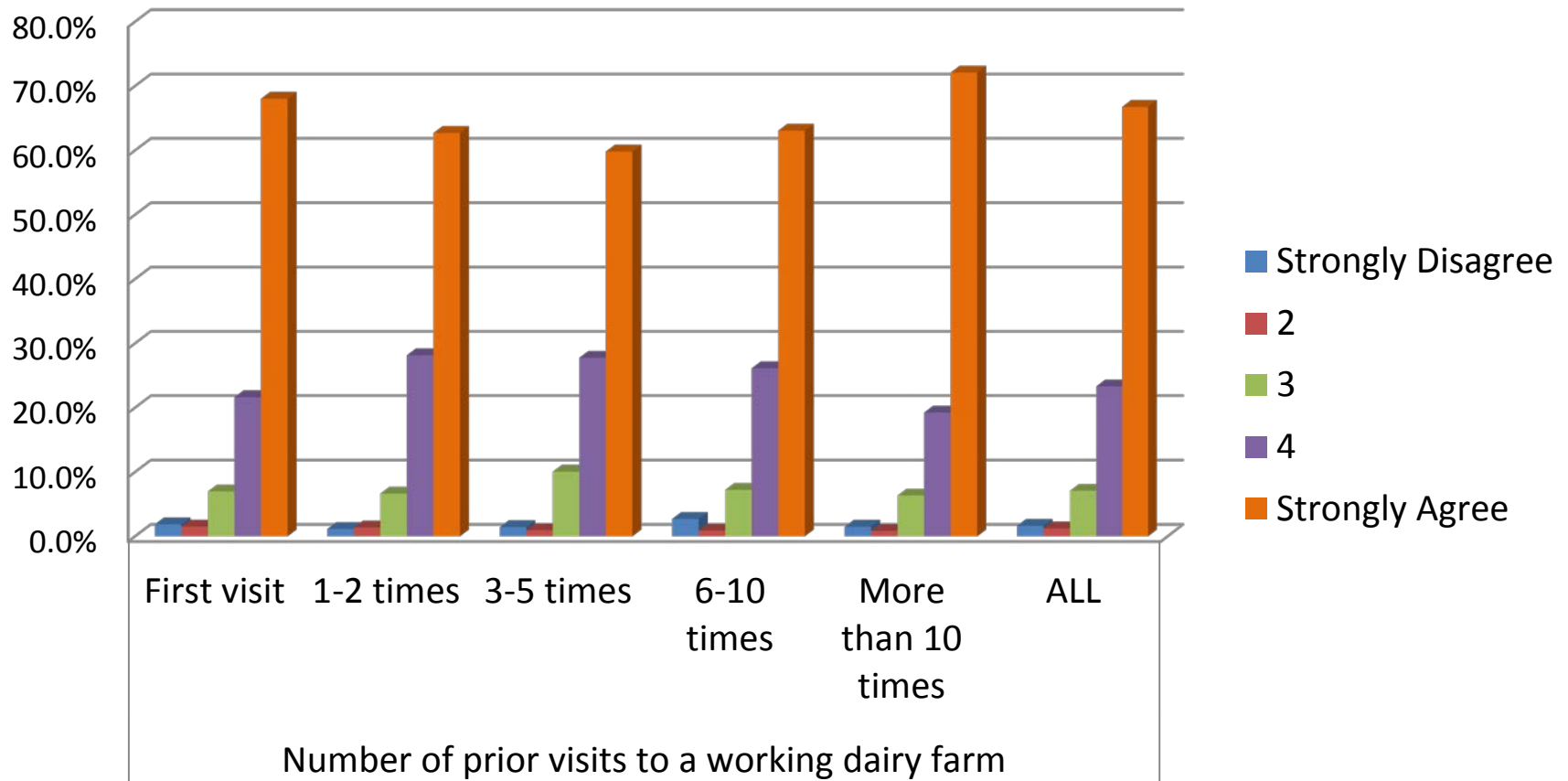
Educational Farm Tours Build Trust

My trust in milk as a safe food has increased
(N=2094; 2011-2012 Surveys)



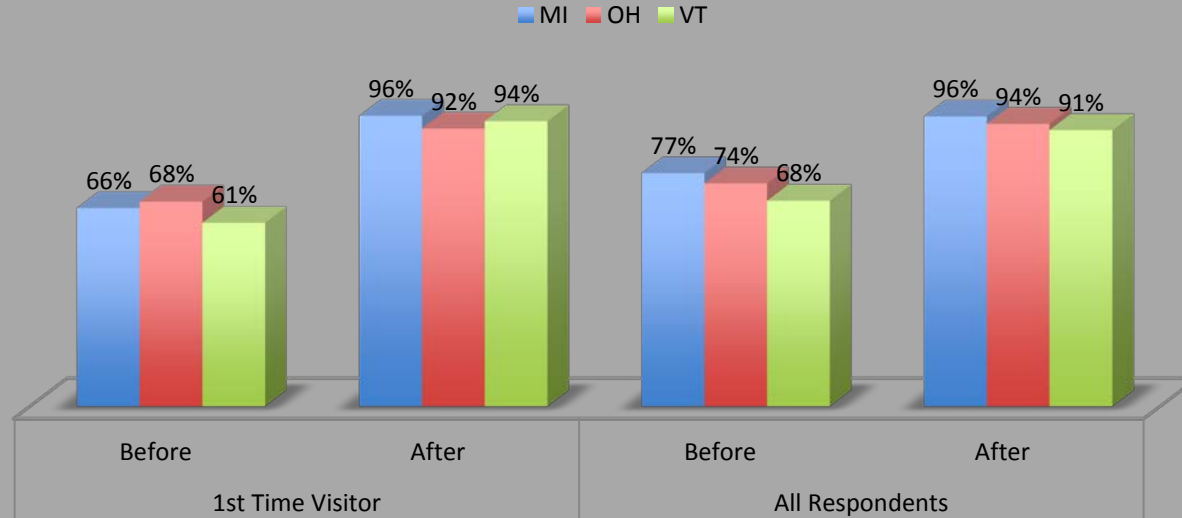
Source: Ted Ferris, MSU Department of Animal Science - 2011-12 dairy farm data

My trust in dairy farmers as a source of information about food production has increased

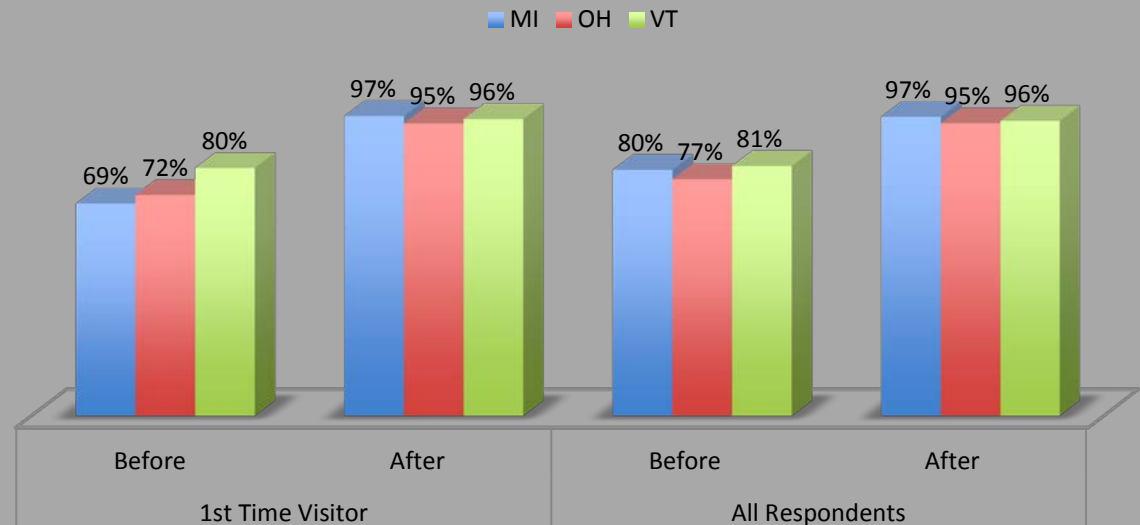


Source: Ted Ferris, MSU Department of Animal Science - 2011-12 dairy farm data

Shift in trust that producers will do the right thing to care for animals

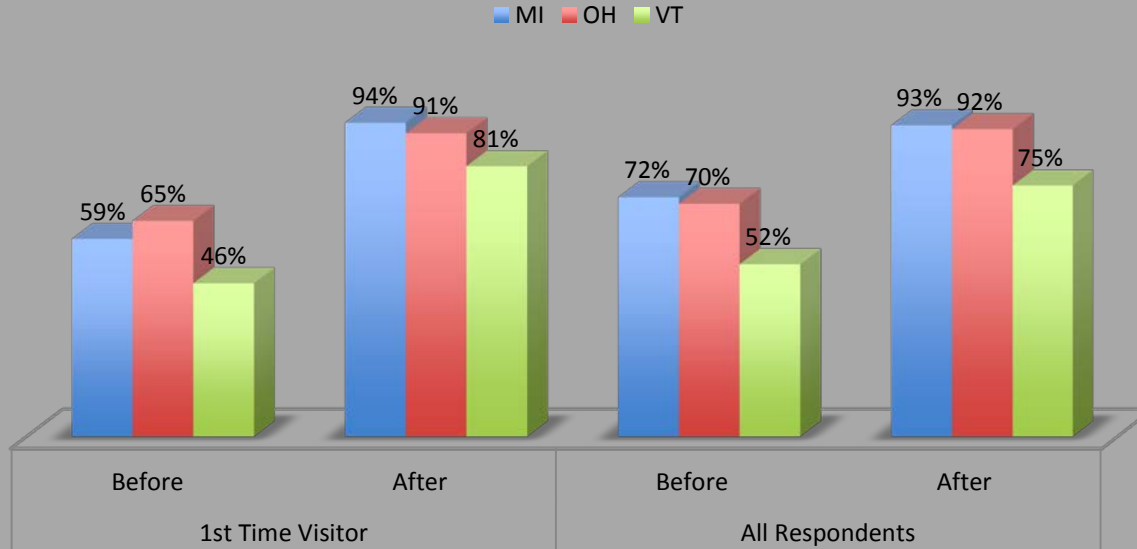


Shift in trust that producers will do the right thing to Safe-guard milk

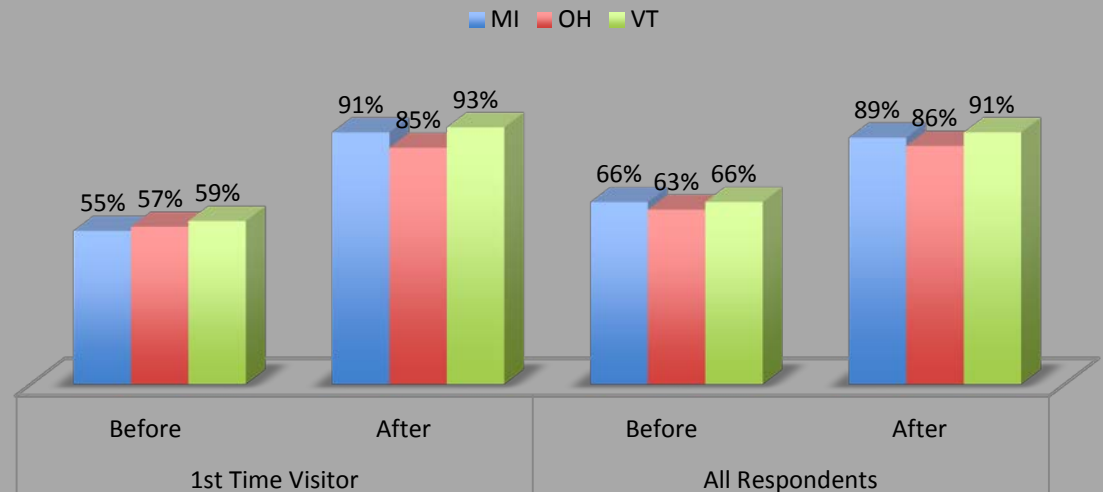


Source: Ted Ferris,
2015 Dairy Farm event data

Shift in trust that producers will do the right thing to protect water quality



Shift in level of trust in modern food production



Source: Ted Ferris,
2015 Dairy Farm event data



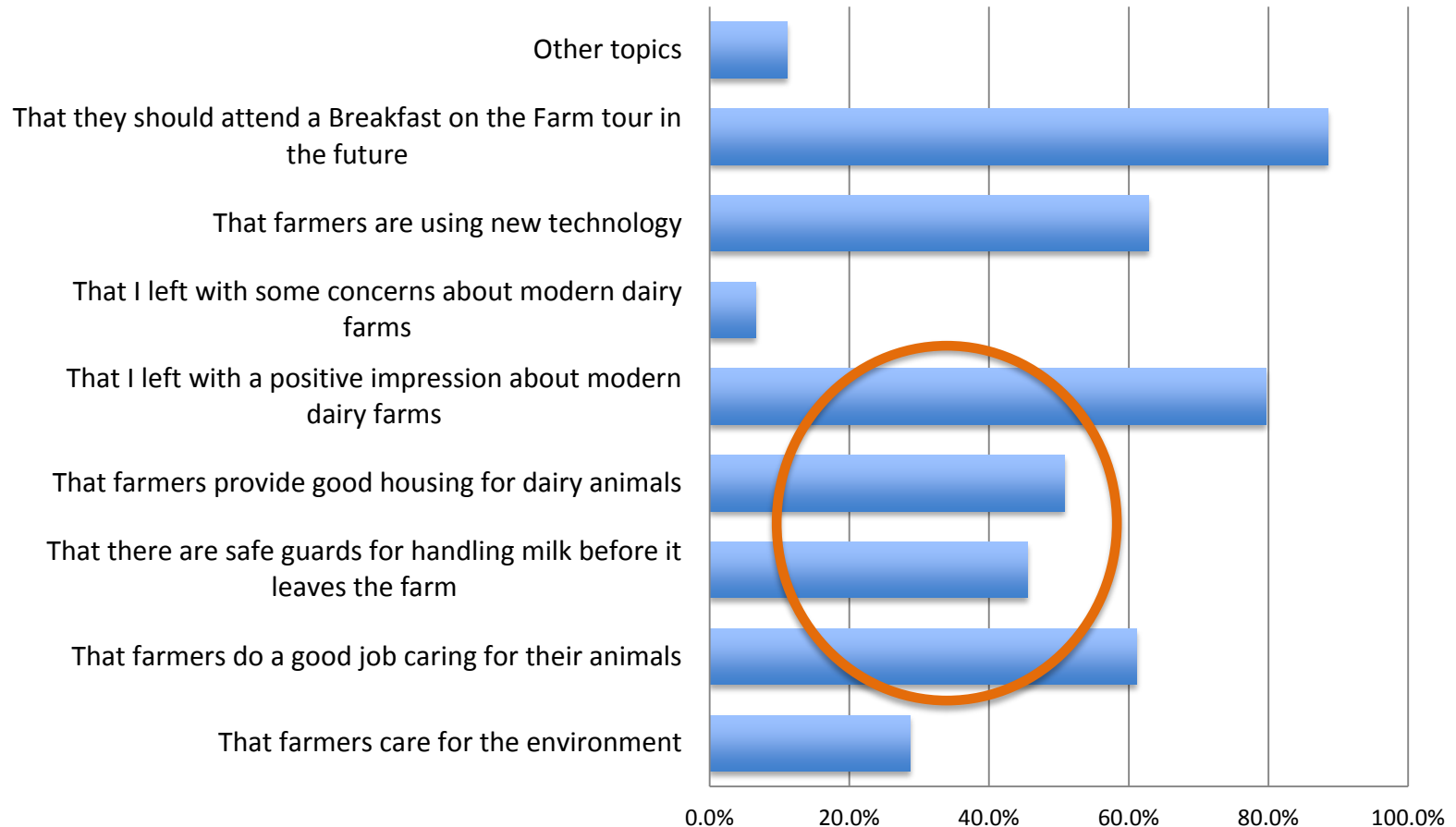
IMPACT beyond the farm gate

What do participants do as a result of their visit?



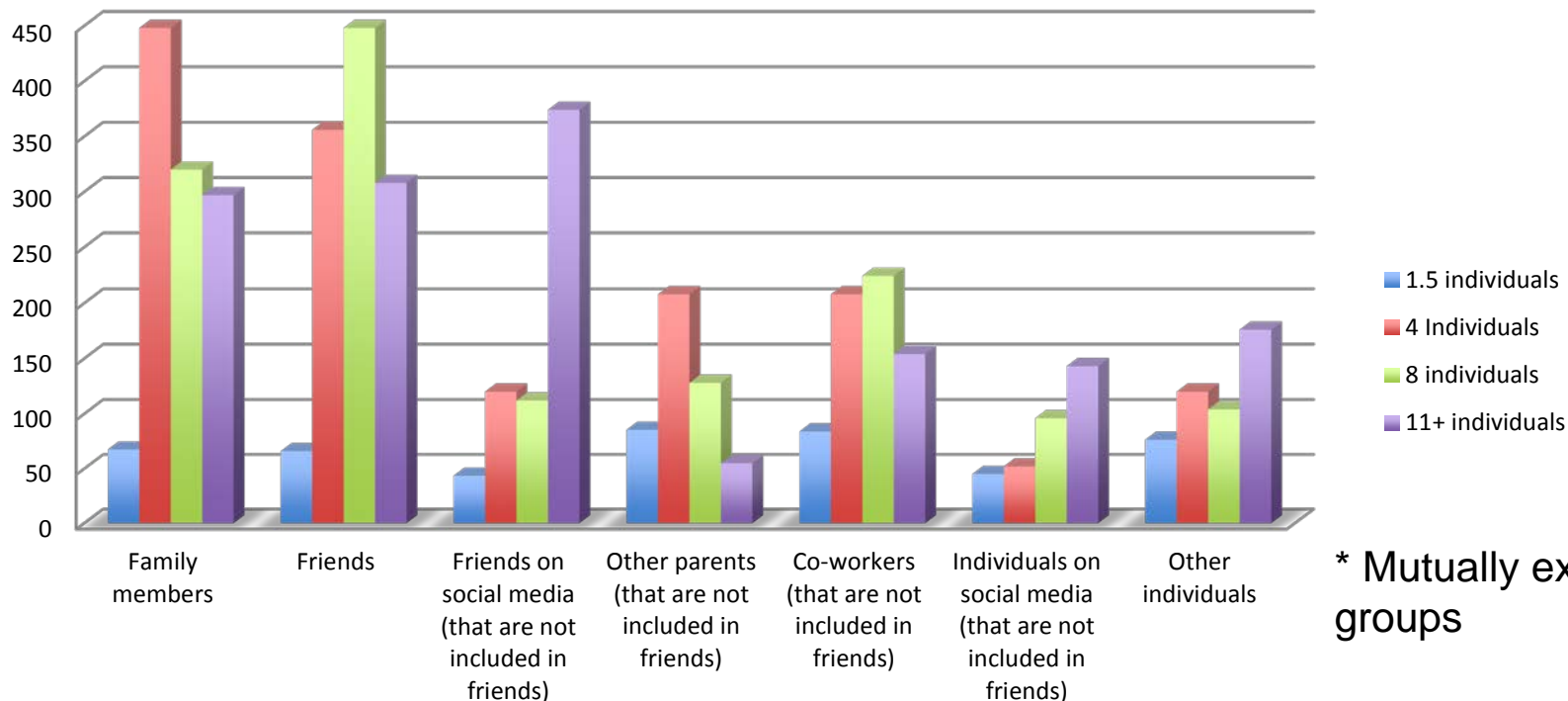
They Are Talking to Others

Topics they have discussed with others



Source: Ted Ferris MSU Department of Animal Science On-line Survey 2012 data

Total number of individuals talked to about tour by category*



* Mutually exclusive groups

Talked to 122,000 people

Average: Each participant spoke to 22 people

Increased Dairy Product Purchases (3 years)

				Sample Household Increase/Wk			
Survey Year	Dairy Farms	Households	% That Increased Purchases	Milk (Gal)	Cheese (Lbs)	Yogurt (6-8 oz)	Estm. Annual Value
2012	7	5653	20	1	1	1.65	\$404,340
2013	4	3407	24	1.08	1.45	1.65	\$321,519
2015	5	4453	17	1.18	1.15	1.85	\$341,545
	16	13513	20	\$3.00	\$3.00	\$0.50	Unit Value (\$)

Source: Ted Ferris, MSU Department of Animal Science- Dairy Farm event data

Why Did They Increase Purchases?

2013 (n=30)	2015 (n=31)	Percentage of individuals who consider the following a major factor for increasing dairy product purchases
50.0	34.4	Belief that farmers care about their animals
50.0	28.1	Comfort with how animals are housed and managed
46.4	34.4	How milk from cows treated with antibiotics is prevented from being sold to the consumer
46.4	37.5	Their trust in farmers to produce a safe product
44.4	40.6	Their trust in dairy farmers
37.9	29.0	The openness of the farm tour to allow the public to see how things are done on a modern farm
24.1	28.1	Belief that farmers care about the environment
20.7	15.6	Understanding of how the environment is being protected

Source: Ted Ferris, MSU Department of Animal Science- 2013-15 Dairy Farm event data

SUMMARY

- Improved impressions about animal housing and management and modern farming methods.
- Increased trust in food safety and farmers!
 - In general, shifts in positive impressions and high trust:
 - From 55-65% to 90-97%
- 17-24% increased dairy product purchases
- They talked to others about BOTF experience
 - Avg. 22 people/participant
- 70-80% indicated they would do 2 more online surveys



CONCLUSIONS

- *It's about TRUST*
- CHANGE IN TRUST occurs from:
 - Seeing facilities and how animals are managed, milked, and receive vet care
 - Learning how milk is safe guarded/antibiotic free
 - Meeting and interacting with farmers and other professionals including a veterinarian and nutritionist
 - Transparency of being on a modern farm



CONCLUSIONS

- Consumers want to know dairy products are safe and that animals are cared for
- Consumers want to trust that farmers will do the right thing
 - Agriculture must be transparent to build TRUST
 - Ag gag laws are counter-productive
- We need to communicate with the public to reduce confusion & misleading information
 - Communication is a two-way process
 - We need to listen to the customer
 - Surveys help
 - We need to be engaged with restaurant chains, food companies, and marketers who are making decisions





For more information visit: www.breakfastonthefarm.com
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