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Information Needs Assessment Survey Results for the Upcoming NAHMS Beef 2017 Study



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Introduction

Before launching a national study, the USDA's National Animal Health Monitoring System (NAHMS)¹ conducts a needs assessment survey to determine the critical information gaps regarding the health and management practices used by the industry being studied. Recently, beef industry stakeholders—including beef producers, veterinarians, academia, members of allied industry, and government officials—participated in a needs assessment survey for NAHMS' upcoming Beef 2017 study. In addition to seeking input on the most pressing information needs related to the U.S. beef industry, the survey asked for ideas about possible participation incentives for the study. Findings from the survey will help NAHMS ensure the success and maximum benefit of the study and can also help inform others working to meet the information related to the industry.

The Beef 2017 needs assessment targeted U.S. beef industry stakeholders and consisted of a short online questionnaire. Questionnaire responses were collected from 690 industry stakeholders in 43 States as well as several foreign locations from February 17 through May 15, 2016. Announcements about the survey were distributed by multiple means, including newsletters and email lists from the American Association of Bovine Practitioners, the Academy of Veterinary Consultants, and the National Cattlemen's Beef Association. Announcements about the option to participate in the needs assessment survey were distributed through multiple beef media outlets in both electronic and hard-copy formats.

In addition to information collected during the needs assessment survey, NAHMS considered information accumulated from reviews of existing scientific literature, discussions at industry and scientific meetings, input from within the USDA, and input from other government agencies. The feasibility of addressing a particular need was carefully evaluated. In part, feasibility was determined by prioritizing all identified information needs, the availability of effective study design methods, funding, and beef industry demographics. As a result, it is possible that some of the recommendations from the needs assessment may not be included in the Beef 2017 study.

¹NAHMS is a nonregulatory program of the USDA created to help meet the Nation's animal health information needs. NAHMS studies provide information that help animal industries maintain the health and well-being of their animals and ultimately produce higher quality products with greater efficiency. Studies are designed to deliver baseline information and focus on areas of national importance not already adequately studied.

Survey Results

A. Web-based survey responses

Individual respondents were asked to provide information about their primary role in the beef industry and, for those that were beef producers, the nature of their beef operations (e.g., cow-calf, feedlot) and the number of beef cows they own. Respondents were also asked to rank their top five priorities from a list of issues related to animal health (table 1). Additionally, respondents were asked to evaluate the importance of possible incentives for study participation (table 2).

Table 1. Issue areas for prioritization

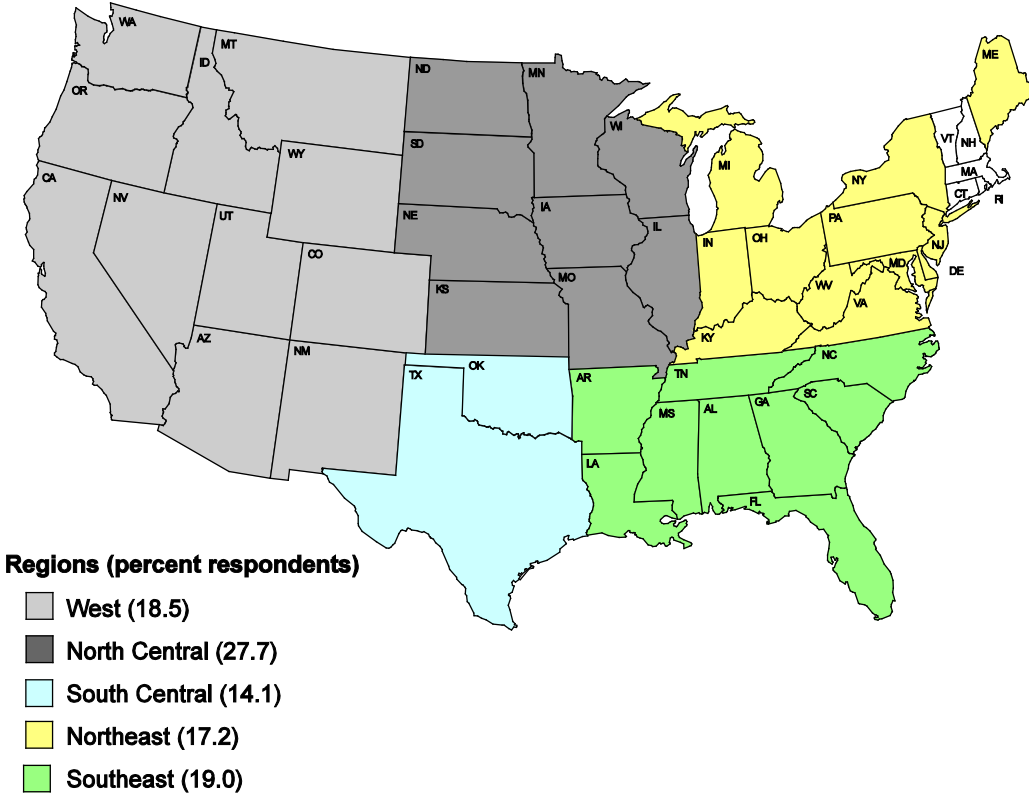
Issue area
Animal welfare
Antimicrobial use/resistance
Biosecurity/disease prevention
Calf health
Cow health
Environmental stewardship/sustainability
Food safety
Foreign animal disease
Genomics and disease
Heifer management
Infectious disease
Lameness/structural soundness
Nutrition/feed management
Quality assurance/residue avoidance
Reproductive health
Traceability/animal identification

Table 2. Priority study-participation incentives

Incentive
BVD testing
Electronic ID tags
Feed/forage analysis
Genomic testing
Parasite testing
<i>Salmonella</i> testing
Water quality analysis

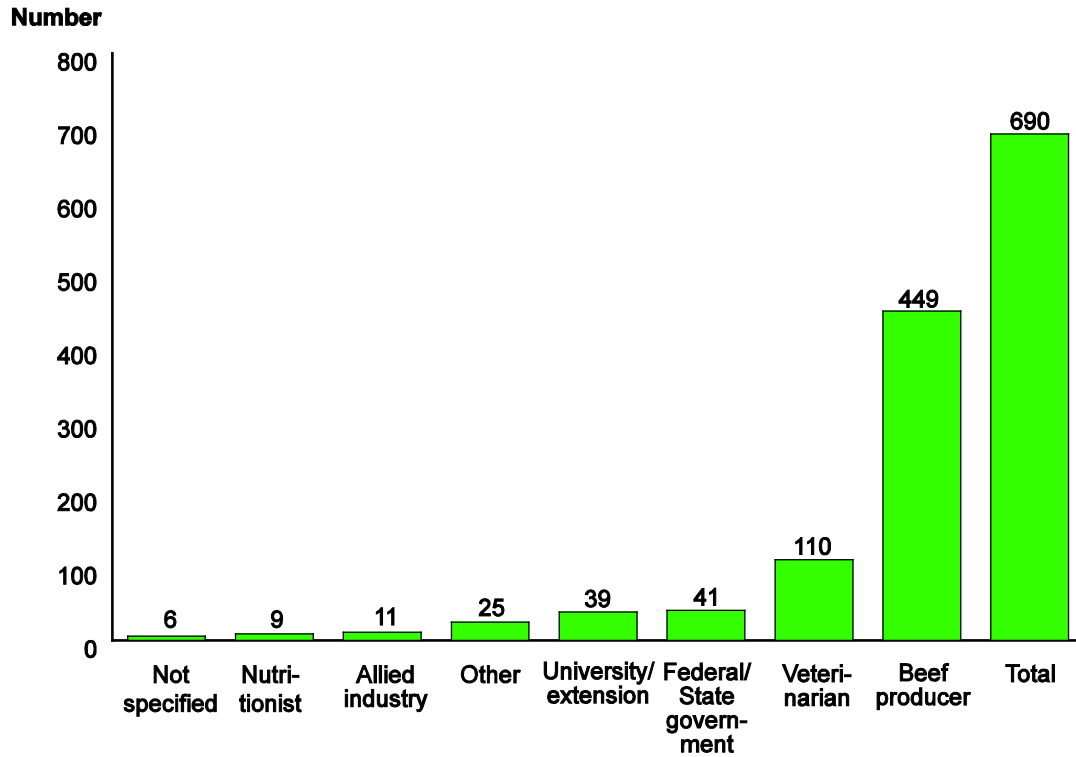
In all, 690 individuals from 43 States and several foreign locations responded to the needs assessment questionnaire. Approximately one-fourth of respondents were from the North Central region (27.7 percent) and about one of five were from the Southeast (19.0 percent), West (18.5 percent), and Northeast (17.2 percent) regions, while 14.1 percent were from the South Central region; 3.5 percent did not specify their location or were from outside the United States.

Beef 2017 participating States



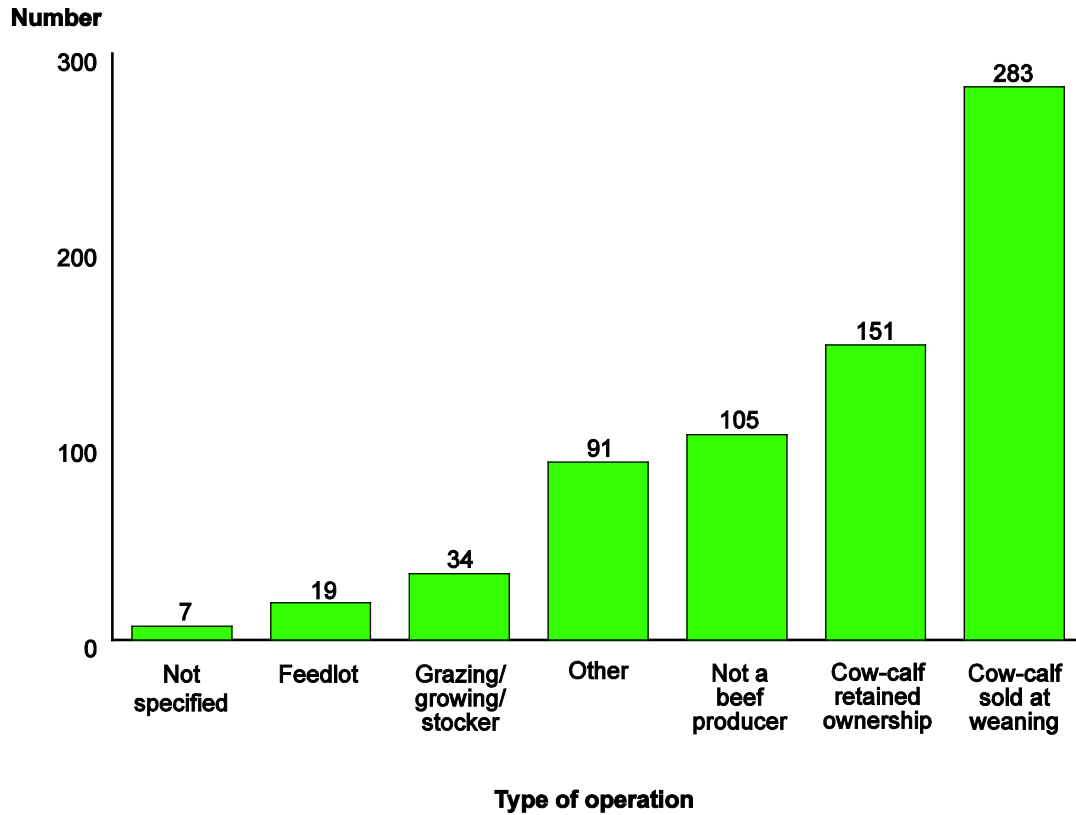
Two-thirds of respondents (449; 65.1 percent) were beef producers (figures 1, 2). Veterinarians were the next most prevalent category of respondents (110), accounting for 15.9 percent of all respondents. Each of the remaining respondent categories included 6.0 percent or less of all respondents.

Figure 1. Number of individual respondents by primary role in the beef industry



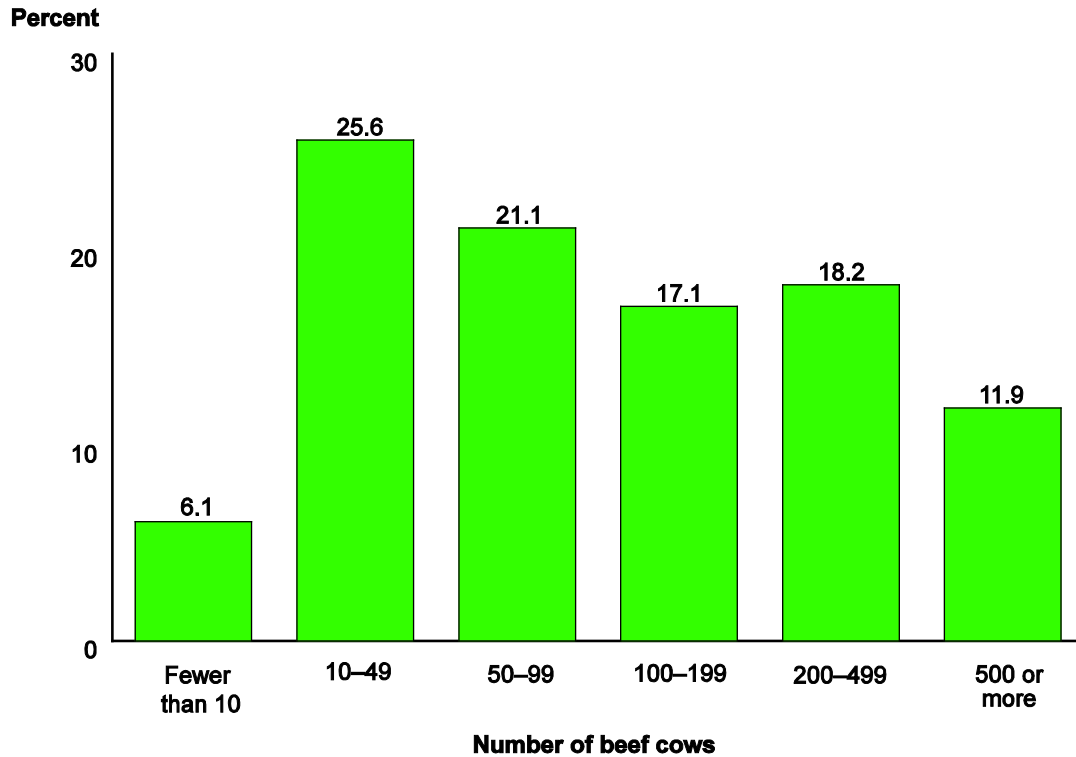
For all respondents (n=690), most (283; 41.0 percent) were cow-calf producers that sold calves at weaning (figure 2). Another 151 (21.9 percent) were cow-calf producers that retained ownership of their calves after weaning. Stocker and feedlot operators accounted for 4.9 and 2.8 percent of all respondents, respectively. Some respondents had a beef operation but indicated that beef producer was not their primary role in the industry, which explains why the number of beef operations in figure 2 does not add to 449.

Figure 2. Number of respondents, by type of operation



Beef-producer respondents were somewhat evenly distributed across the herd size categories offered. About one-fourth of beef-producer respondents (114; 25.6 percent) had 10 to 49 beef cows, and about 1 of 5 had 50 to 99 cows (94; 21.1 percent), 100 to 199 cows (76; 17.1 percent), or 200 to 499 cows (81; 18.2 percent) [figure 3]. The largest operations (500 or more beef cows) made up 11.9 percent of respondents. The remaining respondents (6.1 percent) had fewer than 10 beef cows.

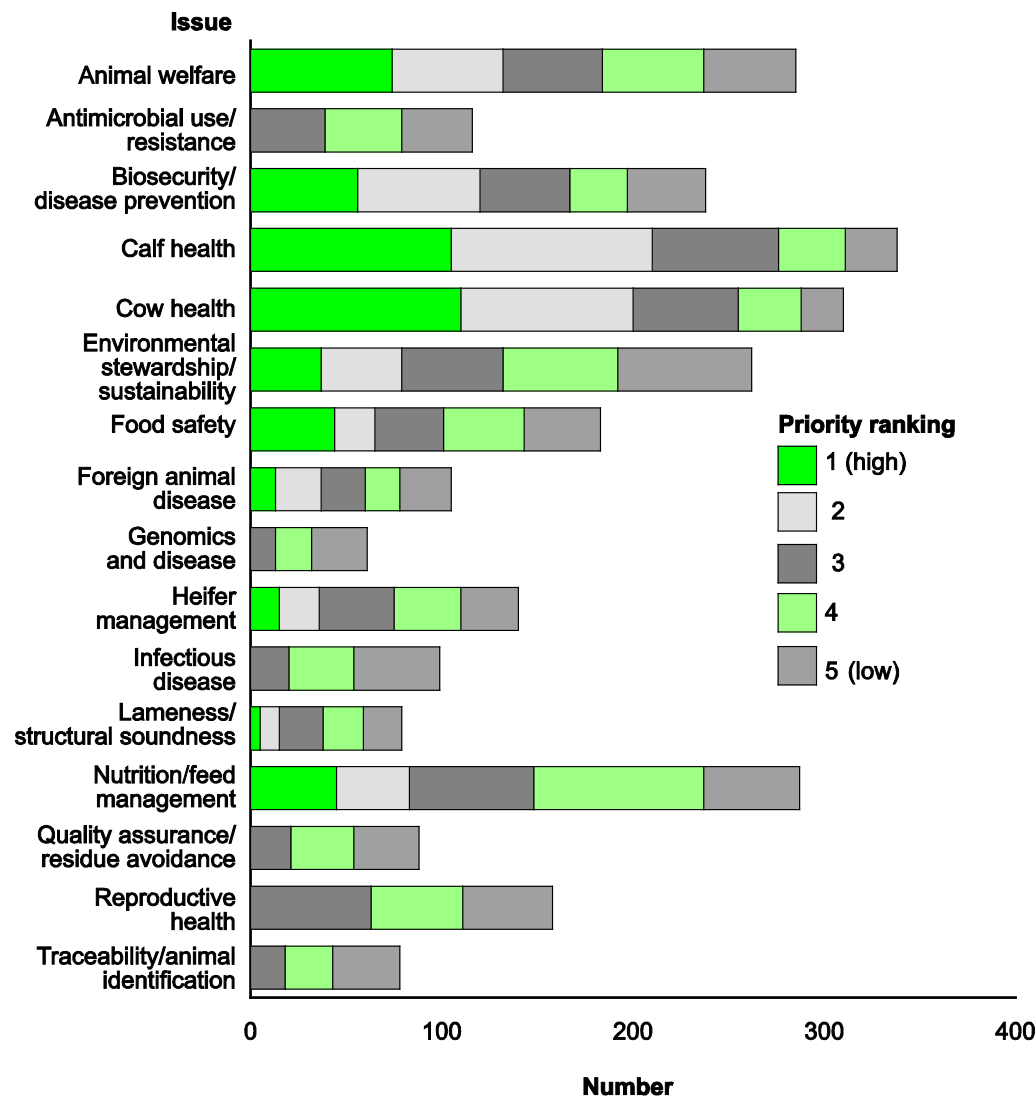
Figure 3. Percentage of respondents,* by size of cow herd



*Some respondents with operations other than cow-calf operations reported having some beef cows.

Respondents were asked to rank their top five priority management issues recommended for study focus. Figure 4 shows the aggregate respondent ranking of these issues as well as the number of respondents that ranked the issues at each level. For example, in aggregate, the highest number of respondents (338) ranked calf health as a top five priority issue. Of these respondents, 105 ranked calf health as the highest of their top five priority issues. Another 105 ranked calf health as their second priority issue, and 66, 35, and 27 respondents ranked calf health at priority levels of 3, 4, and 5, respectively. Other management issues ranked in the top five included cow health, nutrition/feed management, animal welfare, and environmental stewardship.

Figure 4. Number of respondents by top five* priority management issues recommended for study focus



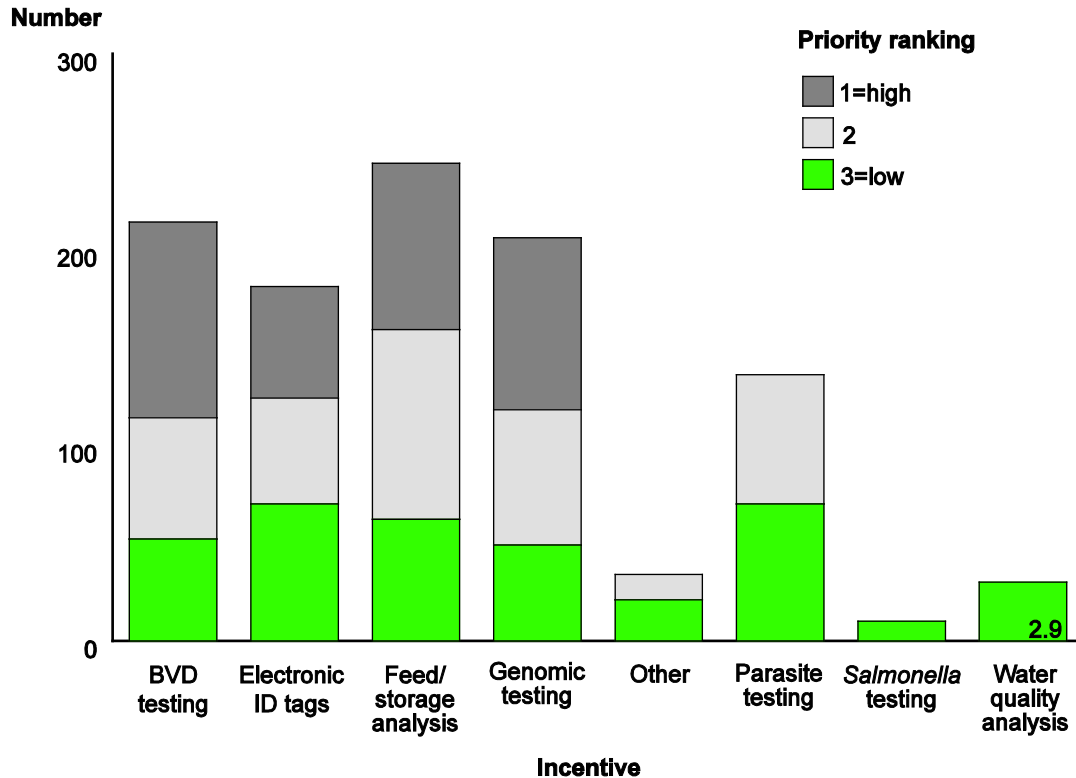
*Respondents ranked issues from 1 to 5, with 1 being the highest priority and 5 being the lowest.

For each management issue ranked, respondents were asked to provide specifics about the issue. These open-ended, write-in responses will be used to refine the study objectives and to craft specific questions to be used during Beef 2017 data collection, ensuring that the information provided is responsive to the issues of highest priority.

Since most respondents were beef producers (449/690), the prioritized issues for beef producers mirror those shown for all respondents. With the exception of veterinarians, there were too few respondents with other roles in the beef industry to draw meaningful conclusions about their specific rankings. Veterinarians' priority rankings were closely aligned with those of beef producers.

The needs assessment survey asked respondents to prioritize the top three incentives they thought would be most effective for encouraging study participation. Overall, feed or forage analysis was a priority for the highest number of beef-producer respondents (figure 5). Other popular incentives included testing for persistent infections with bovine viral diarrhea virus, genomic testing, obtaining electronic ID tags, and parasite testing.

Figure 5. Number of respondents by top three* incentives recommended to encourage study participation



*Respondents chose three incentives and ranked them from 1 to 3, with 1 being the highest priority and 3 being the lowest

B. Individual write-in responses from the survey

While the needs assessment survey provided many opportunities for respondents to list priority issues or incentives that were not part of the provided list, the number of these responses was very low and had no consistent theme.

C. How objectives for NAHMS Beef 2017 will be determined

To determine which information needs the NAHMS Beef 2017 study might be able to meet, reviews of the existing scientific literature, discussions at industry and scientific meetings, and input from within USDA will be combined with the outcome of the needs assessment survey. NAHMS will then assess the feasibility of meeting these needs, which will be determined by the availability of effective study design methods, funding, and beef industry demographics.

The objectives for the NAHMS Beef 2017 study will be determined by summer 2017. NAHMS will then develop a study design to collect necessary data to meet the defined objectives using study questionnaire responses and biological sample collection (if indicated to meet study objectives). Data collection for the study will begin in fall 2017. Enumerators from the National Association of State Departments of Agriculture will collect the data during an on-site visit to selected beef operations. A followup, on-site visit by Federal or State veterinary medical officers or animal health technicians will occur in early 2018.

Appendix I: Web-based survey

NAHMS Beef 2017

Thank you in advance for providing input for the National Animal Health Monitoring System (NAHMS) Beef 2017 study of the cow-calf segment of the beef industry. You are in a unique position to know the information needs of the U.S. beef industry and to determine which issue areas to focus on in the upcoming Beef 2017 cow-calf study. The survey should take about 5 minutes to complete. There is a section at the end where you can add general comments.

Please complete by May 15, 2016.

1. In which State do you reside?

2. Indicate your primary involvement with the beef industry:

Beef producer

Veterinarian

Nutritionist

University/extension

Federal or State government

Allied industry (pharmaceutical company, etc.)

Other (please specify)

3. What is the predominant nature of your beef operation?

Not a beef producer

Cow-calf selling calves at weaning

Cow-calf with retained ownership after weaning

Grazing/growing weaned calves (stocker)

Feedlot

Other (please specify)

4. How many cows do you have today?

- 0
- 1 to 9
- 10 to 49
- 50 to 99
- 100 to 199
- 200 to 499
- 500 or more

5. Choose five issue areas and prioritize them ("1" is highest priority).

	1 (highest priority)	2	3	4	5 (lowest priority)
Animal welfare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Antimicrobial use/resistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Biosecurity/disease prevention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Calf health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cow health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental stewardship/sustainability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foreign animal disease	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Genomics and disease	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Heifer management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Infectious disease	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lameness/structural soundness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nutrition/feed management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality assurance/residue avoidance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reproductive health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traceability/animal identification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. For each of the five highest priority issue areas identified above, give a specific question or topic to be addressed:

Issue 1:

Issue 2:

Issue 3:

Issue 4:

Issue 5:

7. What is the most important animal-health issue facing the beef industry?

8. Which of the following incentives do you think would encourage beef producers to participate in the upcoming Beef 2017 cow-calf study by answering interviewers' questions about their operations? Choose three and prioritize ("1" is highest priority or greatest incentive).

	1 (highest priority)	2	3 (lowest priority)
BVD testing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electronic ID tags	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feed/forage analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Genomic testing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parasite testing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salmonella testing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water quality analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. If one of your prioritized incentives in question 8 was "Other," please specify a type of incentive that you would recommend.

10. Other comments: