

October 27, 2016

A Stronger, Fairer Poultry Industry for Maryland **Findings from a Survey of Maryland Voters**

To: Interested Parties

From: Greenberg Quinlan Rosner Research

A recent survey of Maryland voters conducted for the Johns Hopkins Center for a Livable Future indicates that Marylanders both recognize the importance of the poultry industry and industrial chicken farming to the state's economy and support actions that will strengthen the industry for everyone in the state. Even in the face of pushback on fiscal arguments, voters—including in the Eastern Shore counties where the industrial poultry industry has a strong presence—support more oversight of the industry as a way of creating a fairer and more equitable system and protecting the health and wellbeing of Maryland residents.

Voters not only broadly support increasing oversight of the industrial chicken farming industry, but also back specific proposals that help that effort. This includes requiring large poultry processing companies to pay their fair share for the removal of excess waste from their contract growers in the state, as well as a proposal to encourage local governments to pass public health laws that limit the number of chickens that can be contained in a specific area.

There is clear support for action here, and voters also express willingness to reward state legislators who take action on these issues, with majorities of voters saying they would be more favorable toward a lawmaker who supports proposals to increase oversight of the industrial chicken farming industry.

The following findings are based on an online survey of 500 registered voters in the state of Maryland, including an oversample of 100 voters in the Eastern Shore, for a total of 600 interviews, weighted to reflect a representative sample of Maryland voters. The results of the survey, conducted August 18-28, 2016, are subject to a margin of error of +/- 4.0 percentage points at a 95 percent confidence level.

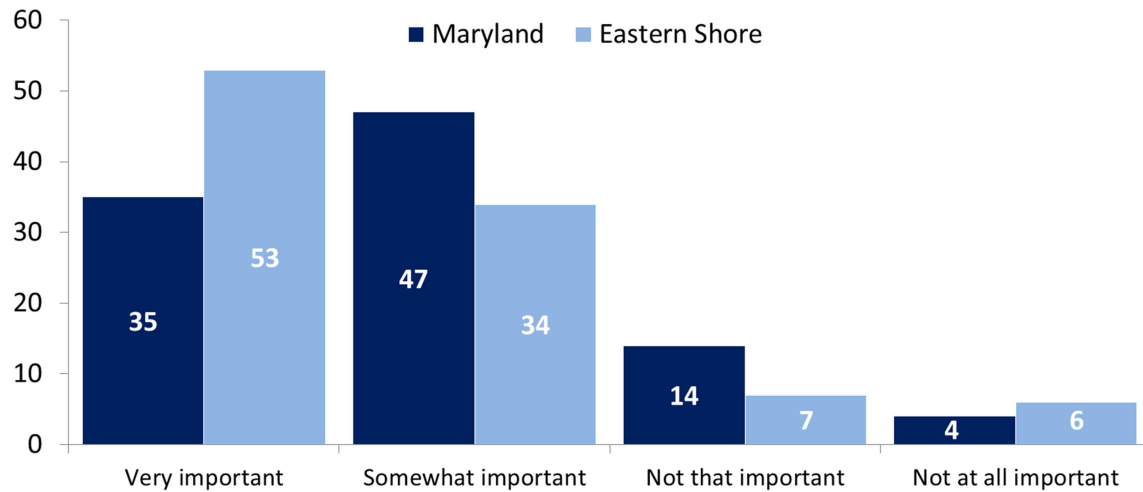
Voters recognize the importance of Maryland's poultry industry, but also see a role for government in overseeing and strengthening the industry

Voters across the state understand that the poultry farming industry plays a big role in the state's economy; 82 percent of voters statewide believe the industrial chicken farming industry is very or somewhat important to the Maryland economy. Not surprisingly, voters in the Eastern Shore express even more intensity on this notion—87 percent believe the industrial chicken

farming industry is very or somewhat important to the Maryland economy, with more than half who think the industry is very important to the economy.

■ Figure 1: Importance of industrial chicken farming industry on MD economy

From what you know or have heard, how important is industrial chicken farming and the poultry industry to the Maryland economy?



However, voters also express confidence in governmental institutions and believe that government can play a role in improving the industrial poultry farming industry. Maryland voters view both the Maryland Department of the Environment (36 – 23 percent favorable-unfavorable) and the Maryland Farm Bureau (26 – 21 percent favorable-unfavorable) positively. Among voters in the Eastern Shore, the Farm Bureau’s standing is even stronger (36 – 20 percent favorable-unfavorable), while the Department of the Environment receives positive ratings (41 – 28 percent favorable-unfavorable) that are comparable to voters statewide.

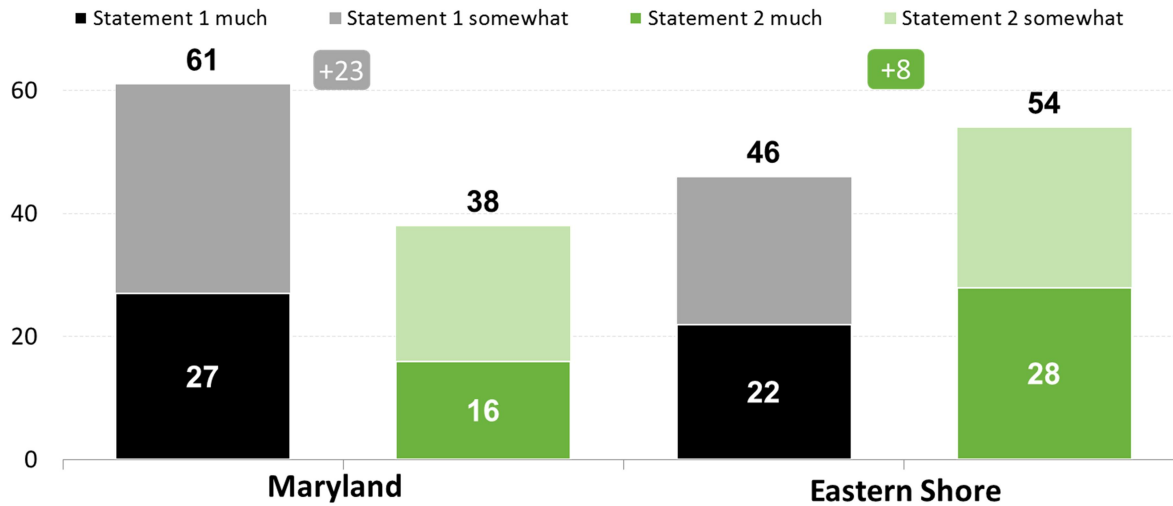
Most importantly, most voters in the state (61 percent) fundamentally believe that government has a role in working to improve problems in the state versus leaving businesses and individuals to handle issues on their own (38 percent). Even in the Eastern Shore where voters are more reticent initially on government’s role in industry, nearly half think government should do more.

■ Figure 2: General support for role of government

Please read these two statements. After, please indicate which comes closer to your own view, even if neither is exactly right.

Government should do more to solve problems and help meet the needs of people.

Government is doing too many things better left to businesses and individuals.



A strong desire exists for more oversight on handling waste from industrial chicken farms initially, while voters are more mixed on oversight of operations generally

Voters statewide come to this issue with strong support for more oversight of the industrial chicken farming industry broadly and with respect to the handling of chicken waste specifically. More than half of voters in the state (52 percent) want more oversight of the industry, while only 8 percent believe oversight should be decreased. Fifty-nine percent of voters want more oversight of the management of chicken waste.

Voters in the Eastern Shore are equally as eager to see more oversight on the handling of chicken waste; however, they are more reluctant about additional oversight broadly (39 percent want increased oversight), with a plurality of 47 percent who favor the current levels of oversight.

Figures 3 and 4: Initial measure of support for more oversight of industrial chicken farming industry

Oversight should be...	% of all Maryland voters	% of Eastern Shore voters
Increased	52	39
Stay the same	40	47
Decreased	8	14

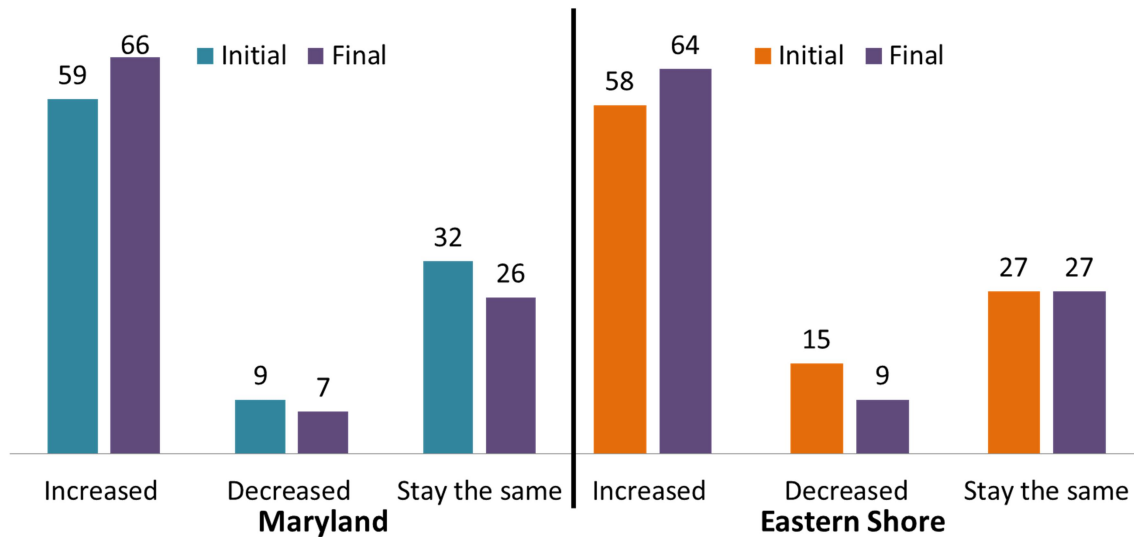
Oversight of handling chicken waste should be...	% of all Maryland voters	% of Eastern Shore voters
Increased	59	58
Stay the same	32	27
Decreased	9	15

Playing out the debate on both sides produces strong movement toward support for more oversight of the industrial chicken farming industry, including among voters in the Eastern Shore

Educating voters produces a real impact here, and voters across the state—and particularly in the Eastern Shore counties—show stronger support for increased oversight after hearing arguments in favor of and against making changes to the way the chicken farming industry operates. Statewide, the number of voters who want an increase in the oversight of the handling of chicken waste jumps from 59 to 66 percent; in the Eastern Shore, the increase is from 58 to 64 percent. Support also increases disproportionately among voters with children, women, and voters under the age of 50.

Figure 5: Increase in support for more oversight of handling of chicken waste after balanced debate

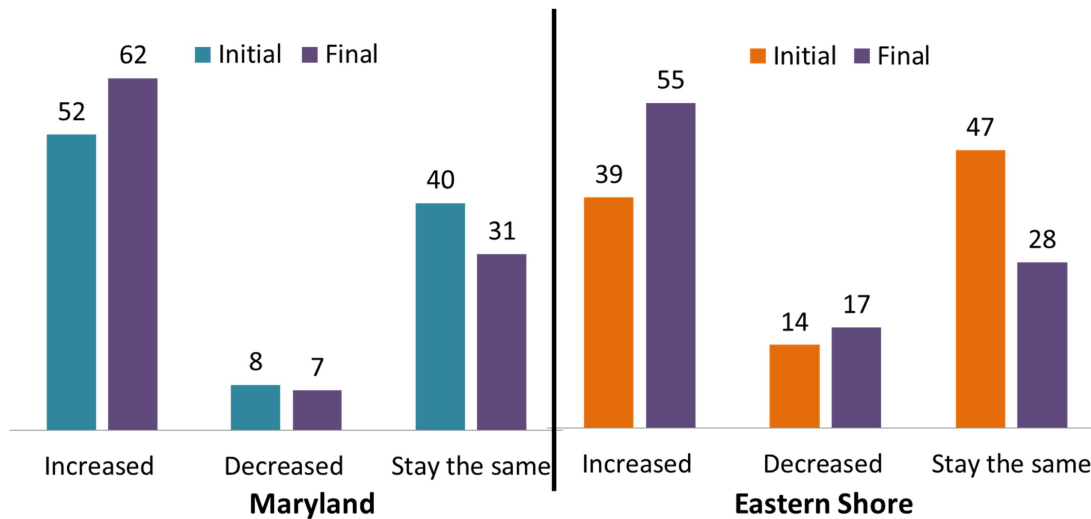
In your view, should oversight of the way the industrial chicken farming industries handle waste be increased, decreased, or stay the same?



Importantly, support for broadly increasing oversight of the chicken farming industry also increases among voters statewide and in the Eastern Shore in particular. The desire for more oversight increases by 10 points, from 52 to 62 percent, among all Maryland voters. More impressively, the debate moves the more reluctant voters in the Eastern Shore from 39 percent supporting more oversight initially to a majority of 55 percent supporting after information.

■ Figure 6: : Increase in support for more broad oversight of industrial chicken farming industry

In your view, should oversight of the way the industrial chicken farming industries operate be increased, decreased, or stay the same?



Voters overwhelmingly support specific proposals to improve the chicken farming industry; support holds up against tough economic pushback

Voters maintain support for more oversight of the industrial chicken farming industry when presented with specific proposals to strengthen the industry and protect the state's residents, farmers, and environment. Large majorities of voters statewide and in the Eastern Shore support these measures, including:

- *Require large poultry processing companies to pay for the removal of excess chicken waste from their local contract growers* – 86 percent support among Maryland voters; 84 percent support among voters living on the Eastern Shore
- *Encourage local counties and communities to pass public health laws that limit the construction of new poultry houses and the number of animals that can be contained in one area* – 76 percent support among Maryland voters; 71 percent support among voters living on the Eastern Shore

Even after voters hear arguments for and against these proposals¹, support remains strong, with more than 7-in-10 voters supporting each of the proposals. The post-argument support for these proposals is encouraging in that there is no real shift even after voters hear tough economic arguments that these measures could lead to higher costs, job losses, and businesses leaving.

¹ The full text of arguments for and against the proposals is included in the attached appendix.

■ **Figure 7: Increase in support for specific proposals after information**

Proposal	Maryland		Eastern Shore	
	Initial	Post Argument	Initial	Post Argument
Processing companies pay for removal of excess waste	86-14	86-13	84-16	83-17
Local areas pass public health laws limiting new poultry houses and number of animals	76-24	78-22	71-29	72-28

Two themes stand out as most powerful for voters in support of these proposals, centering on improving economic fairness and protecting residents' health and wellbeing:

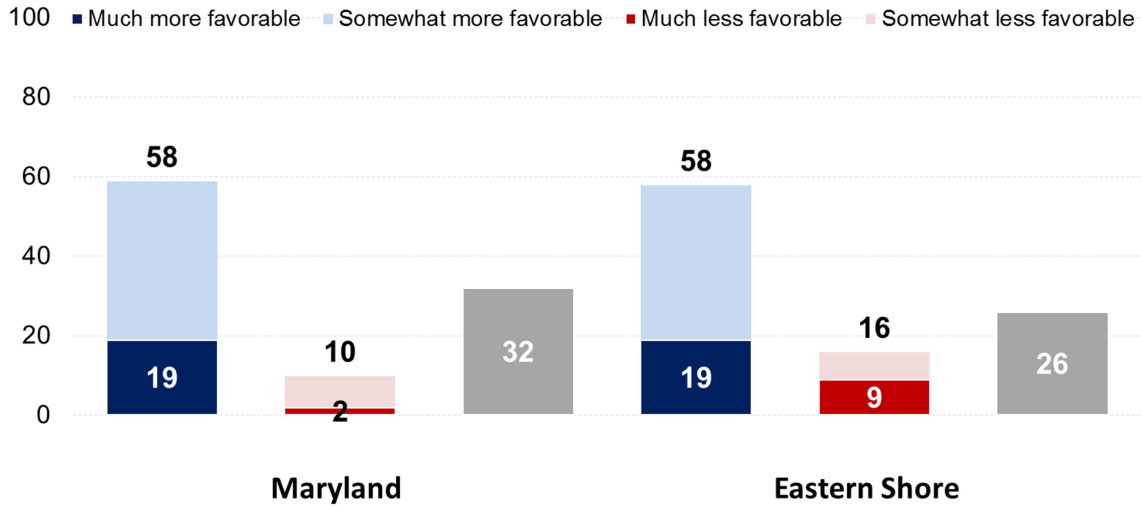
- Voters want to ensure the industrial chicken farming industry works for all who participate, including the individual growers and the broader economy. They favor plans that require the large processing companies to pay their fair share of managing chicken waste removal instead of making taxpayers and growers bear the burden.
- Voters want to make sure that there is oversight requiring the industrial chicken farming industry to monitor and pay for cleanup of the environmental impacts of the industry, and promote industry practices that keep Maryland's air and water clean and safe.

Maryland voters are willing to reward legislators who support increased oversight of the industrial chicken farming industry

Voters are not only supportive of increased oversight over the industrial chicken farming industry in Maryland, but also express a willingness to reward legislators who support action on the issue. A strong majority of voters statewide (58 percent) say they would be more favorable toward their state legislator if he or she supported proposals to increase oversight of the industrial chicken farming industry. This also includes 58 percent of voters in the Eastern Shore who would look more favorably toward state legislators. This indicates that this is an issue that legislators can be comfortable talking about and taking action on with the support of their constituents.

Figure 8: Impact on legislators' standing if supporting more oversight

Thinking about everything you have read, if your state legislator supported proposals to increase oversight of the industrial farming industry, would that make you more or less favorable toward him or her, or would it make no difference?



APPENDIX A: Arguments in favor of changes to the industrial chicken farming industry

Argument	% Very Convincing (all MD)	% Total Convincing (all MD)	% Very Convincing (Eastern Shore)	% Total Convincing (Eastern Shore)
<p>[250 Respondents] (WATER RUNOFF - WELL MONITOR) The pollution caused by run-off from chicken waste often contains heavy metals and drug residues that can contaminate public drinking water supplies and private wells and cause kidney failure, liver disease, birth defects, or other illnesses. We need to require big poultry corporations to take responsibility for monitoring water supplies and private wells for contamination</p>	50	83	40	72
<p>(TAX FAIRNESS) Maryland taxpayers currently pay millions of dollars each year to subsidize the removal of chicken waste from local chicken farms, while big poultry corporations make billions of dollars in profits while paying little costs. We need to make these big corporations pay their fair share for the removal of the waste they produce</p>	47	79	47	75
<p>(LOCAL BURDEN) Big corporate poultry producers make billions of dollars in profits a year, while most local Maryland chicken growers live below the poverty line. Yet these local farmers are solely responsible for bearing the costs of disposing of chicken waste, while the big corporations pay little. Big poultry corporations should share in the cost of dealing with this problem by paying for the removal of waste from local chicken farms.</p>	45	78	45	74
<p>[250 Respondents] (WATER RUNOFF - PAY CLEANUP) The pollution caused by run-off from chicken waste applied to land carries pathogens, viruses, and bacteria like E.coli, some of which can cause kidney failure, liver disease, birth defects, or other illnesses. We need to make sure big poultry corporations do their part to keep Maryland's drinking water supply safe from the effects of chicken waste runoff.</p>	43	77	47	73

Argument	% Very Convincing (all MD)	% Total Convincing (all MD)	% Very Convincing (Eastern Shore)	% Total Convincing (Eastern Shore)
<p>[250 Respondents] (QUAL OF LIFE) Maryland residents and families deserve to enjoy a good quality of life, without dealing with the mess and smell created by chicken waste and the big poultry industry. We need to pass reasonable methods of oversight that balance a successful poultry industry with making sure Marylanders can enjoy their property and communities.</p>	39	78	24	63
<p>(RESPIRATORY) Allowing unregulated growth and expansion of poultry farms can create serious health risks for poultry workers and local communities. Emissions from these farms create foul odors and have been linked to higher levels of asthma, chronic bronchitis, and respiratory problems in people living nearby poultry operations. We need to limit the number and density of animals within individual poultry houses to protect the air we breathe.</p>	38	74	43	69
<p>[250 Respondents] (TOUR/ECONOMY) The local economies of Maryland and the Eastern Shore rely heavily on tourism and recreation, and we need to pass reasonable measures that balance building a successful poultry industry with protecting our vital tourist industry.</p>	28	67	37	72

APPENDIX B: Arguments against changes to the industrial chicken farming industry

Argument	% Very Convincing to Oppose (all MD)	% Total Convincing to Oppose (all MD)	% Very Convincing to Oppose (Eastern Shore)	% Total Convincing to Oppose (Eastern Shore)
(TAX KILL JOB) Maryland businesses already face high taxes that make it hard to grow and create jobs. Putting new taxes and fees on the industrial farming industry will only encourage poultry companies to take their business to other states, costing the state's economy billions of dollars and thousands of jobs.	17	54	18	55
(SAFETY/VOLUNTARY MEASURES) Poultry companies work hard to make sure their facilities are safe and healthy and to limit any impact on the community. Poultry producers like Perdue have voluntarily introduced measures to reduce potential risks, like eliminating the use of antibiotics in their chickens, because they are good business practices. Instead of adding more government regulation, we should encourage businesses to voluntarily adopt environmentally-friendly, healthy practices.	14	54	20	49
(OVERREGULATION) There are already plenty of laws in place regulating the industrial chicken farming industry, and we do not need more red tape and regulations that will hurt our state's local growers.	10	41	9	42
(HURT SMALL BIZ) Shifting the responsibility and "ownership" of chicken waste from local growers to processing companies will hurt the small local farms who currently rely on those materials to use as fertilizer or to make profit by selling to other customers.	9	42	11	43