

Results from 2009-2010 AHP Equine Industry Survey

*Prepared by C. Jill Stowe, PhD
Dept. of Agricultural Economics (University of Kentucky)
as a consultant to AHP*

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American Horse Publications (AHP) conducted an online nationwide survey, called the AHP Equine Industry, from October 15th, 2009, through January 31st, 2010. Upon its conclusion on January 31st, 11,189 responses were collected. Of those responses, 18 were empty, leaving 11,171 usable responses. This completed the largest-ever equine industry survey of hands-on horse industry participants in the United States.¹ Potential respondents were made aware of the survey through online and print notifications from AHP members as well as via social networking tools such as Facebook and Twitter. The following pages will describe summary statistics from the five main sections of the survey: demographics, horse ownership, horsekeeping costs, issues facing the equine industry, and horse health care. In addition, results identify recent changes as well as expected future changes in applicable categories.

Demographics

The first section of the survey collects information on respondent demographics. The survey sample is reasonably representative of the equine industry as a whole based on results from previous surveys. The 45-54 year age group is most highly represented, accounting for 30.8% of the respondents; moreover, 63.2% of respondents are age 45+. Previous surveys have indicated that the vast majority of participants in the equine industry are female; that demographic is replicated in this survey, with 88.8% female respondents. The distribution of responses geographically is relatively uniform; more specifically, the frequency of responses by the nine zip code regions exhibited only small degrees of variation (see Table 1 below for a description of the zip code regions). The largest number of responses came from zip code region 9, which constitutes 17% of the responses; the smallest number of responses came from zip code region 0, which constitutes 6% of the responses. Just under 50% of the survey participants had reported annual household incomes (before taxes) of less than \$75,000; 13.4% of the respondents had annual household incomes of at least \$150,000.²

¹ The 1995 NAHMS survey collected responses from 3,349 operations, and the 1998 NAHMS survey collected responses from 2,904 operations. The 2008-2009 American Horse Council Unwanted Horse Survey collected responses from over 23,000 horse owners, non-horse owners, and equine industry stakeholders.

² While income levels are distributed nearly the same by geographic region, there is evidence that in our sample, zip code regions 4 and 5 are slightly more likely to have respondents with incomes less than \$50,000. Similarly, these same regions are less likely to have respondents with incomes of \$150,000 or above.

Zip Code Region	Zip Codes Included	States Included
0	00000-09999	CT, MA, ME, NH, NJ, RI, VT
1	10000-19999	DE, NY, PA
2	20000-29999	District of Columbia (DC), MD, NC, SC, VA, WV
3	30000-39999	AL, FL, GA, MS, TN
4	40000-49999	IN, KY, MI, OH
5	50000-59999	IA, MN, MT, ND, SD, WI
6	60000-69999	IL, KS, MO, NE
7	70000-79999	AR, LA, OK, TX
8	80000-89999	AZ, CO, ID, NM, NV, UT, WY
9	90000-99999	AK, CA, HI, OR, WA

Table 1 – Zip code regions and their corresponding states.

Each household in the sample has an average of 2.5 members; 92.6% of the respondents live in households with no more than 4 members. The average number of household members involved with horses is 1.8, and 84.2% of the survey participants indicate that either one or two household members are involved with horses.

Horse Ownership

The second section of the survey focuses on horse ownership as well as the ways in which individuals are involved with the horse industry. 92% of the respondents indicate that they are horse owners. Nearly 60% indicate that they ride for pleasure; just over 35% indicate that they ride competitively. More than 10% of respondents indicate that they manage farms or barns, are involved in breeding, are riding instructors, or are trainers.

Currently, respondents in the survey own an average of about 5 horses, lease an average of 0.4 horses, and manage an average of about 10 horses. 93.1% of the respondents own at least one horse, 5.2% lease at least one horse, and 22.2% manage at least one horse. The number of senior horses survey participants own, lease, or manage, where a senior horse is characterized as being 15 years of age or older, is 2. Finally, 23.8% of respondents indicate that at least one horse is insured; among these individuals, the average number of insured horses is 2.75, with a maximum of 56. Interestingly, respondents in zip code region 5 have significantly more horses insured on average than any other geographic region in the United States (see Figure 1).

One of the objectives of this survey was to gain an understanding, on a national level, for how individuals' participation with horses and in the horse industry has changed over the past few years as how they expect it to change in the next few years. Initially, the focus is on trends in the number of horses owned, leased, and managed.

Horses Owned (Figures 2 - 4)

Currently, respondents in the survey own an average of about 5 horses; the maximum in the sample is 300. Nearly 25% of the respondents indicate that the number of horses owned today is more than in 2007; just over 22% indicate they own fewer horses today. Over 50% of the sample owns the same number of horses in 2009 as they did in 2007. When considering their future expectations on horse ownership, 16% of the survey participants predict that the number of horses they own today is more than the number they will own in 2011; 19% feel that the number of horses they own today is less than the number they will own in 2011. The remaining 65% expect to own the same number of horses.

When considering the number of horses owned geographically, individuals living in zip code regions 5, 6, and 7 own significantly more horses on average than other regions. This result is not entirely surprising because in general, more land is available as one moves away from the coasts. Furthermore, individuals in the highest income bracket (\$150,000+) own significantly more horses on average than all other income levels. Finally, respondents in the top half of the age category (ages 45+) tend to own more horses than those in the lower half.

When examining the change in horse ownership from 2007 to 2009 and the expected change in horse ownership from 2009 to 2011, there are few geographic trends. However, it appears that those respondents living in zip code 7 are more likely to own fewer horses today than they did in 2007, and moreover, that the trend will continue as they expect to own fewer horses in 2011 than they do today. One potential reason for the trend in this area, as seen in the section on the costs of horsekeeping, is that it seems to have been hit harder by increased costs than other regions.

As one might expect, individuals in the highest income group are more likely than all others own more horses today than they did in 2007. No income trends are present in respondents' expectations about how the number of horses they own today compares to the number they expect to own in 2011.

Finally, age can also be used to explain some of the trends in horse ownership. Respondents ages 45 and above are more likely to remain at the same level of horses owned, both from 2007 to 2009 and from 2009 to 2011. This suggests that the realized and expected changes in horse ownership, both upward and downward, are more likely to occur among those participants under age 45.

Horses Leased (Figure 5)

A relatively small number of horses are leased. In the sample, the average number of horses leased is 0.4; the maximum is 20. 10% of the respondents who lease horses indicate that

the number of horses they lease today is more than 2 years ago, while 9% indicate that it is less. Moreover, in two years, 5% of these individuals expect to be leasing fewer horses than they do today, and 8.5% expect to be leasing more horses than they do today. Roughly 86%, then, plan to lease the same number of horses in 2011.

The only demographic variable important in distinguishing leasing behavior is income; individuals in the highest income bracket leased more horses on average than all others. One explanation for this result may be the existence of a market for leasing high-caliber horses to be used in national competitions, such as young rider competitions.

Most respondents who lease horses indicate that they lease the same number as they did two years ago, and that they do not expect that number to change two years hence. However, among those who expect a change, those respondents residing in zip code region 0 are significantly less likely to lease more horses in 2009 than they did in 2007. Individuals in the highest income group are, on average more likely to lease more horses in 2009 than they did in 2007. Variation in the number of horses leased from 2007 to 2009 also increases as respondents' age increases. This same general pattern exists for the expected change in horses leased from 2009 to 2011.

Horses Managed

On average, survey respondents manage an average of about 10 horses, with a maximum of 2400. Almost 24% of respondents indicate that this number of horses is greater than it was in 2007, while 18% indicate that it is less. Just under 60% indicate that the number of horses they manage today is the same as it was in 2007. 18% of respondents believe that the number of horses they are managing today is more than they will be managing in 2011; 17% believe that they will be managing more horses in 2011 than they are currently. The remaining 65% expect to be managing the same number of horses in 2011. No demographic variables helped explain the number of horses managed. There also seems to be no predictable pattern among demographic variables to explain the recent change, and expected change, in number of horses managed.

Horses Given (Figure 6)

Because of recent events both in the general economy and in the equine industry, respondents were asked whether any of the horses they owned, leased, or managed had been given to them; nearly 32% respond in the affirmative. Of those who indicate that at least one horse had been given to them, only 3% are involved with a rescue operation in some capacity, such as operating a shelter or volunteering for one. Another interesting result is that those in the lowest two income categories (incomes less than \$75,000) are significantly more likely to have had at least one horse given to them. Finally, respondents ages 45 and up were on average less likely than their younger cohort to have been given at least one horse.

Next, respondents were asked general questions regarding the types of services for which they pay. While 80% of respondents indicate that they care for their own horse (in terms of feeding, watering, and cleaning), 39% board their horses on someone else's property. In addition, nearly 44% pay for riding lessons, while nearly 33% pay for someone else to train their horse. Board, riding lessons, and training all represent different mechanisms through which money is commonly exchanged in the horse industry, but determining the magnitude and frequency of these exchanges will require further research.

Use of Horses (Figures 7 – 10)

In addition to identifying their involvement with the horse industry, survey participants were asked to identify all ways in which they used their horses. Almost 75% of the respondents at least sometimes use their horses for pleasure/trail riding. 26.3% of respondents indicate that they at least sometimes ride dressage. Using horses for lessons or training, natural horsemanship, and breeding represent the other most frequently reported uses.

The use of horses depends on respondents' geographic location. For example, respondents living in zip code region 7 are significantly less likely to use their horses for trail riding than nearly every other region in the state. On the other hand, respondents in zip code regions 8 and 9 (that is, the respondents living in the West and Southwest) are, on average, significantly more likely to use their horses for trail riding. The likelihood of a respondent using a horse for dressage increases as one moves from west to east, and respondents living in zip code region 0 are most likely to ride dressage. On the other hand, the likelihood of being involved in breeding increases as one moves from east to west; those living in zip code region 7 are more likely to use their horses for breeding than any other region. The two zip code regions furthest west, regions 8 and 9, are significantly more likely to be home to respondents that indicate they use their horses in natural horsemanship. Respondents living in zip code regions 4, 5, and 7 appear to be the most active in breed shows.

Income levels also play a role in how respondents use their horses. Respondents with incomes of \$125,000+ are significantly less likely, on average, to use their horses for trail riding. On the other hand, the likelihood of using one's horse for dressage increases as income increases. Moreover, those in the highest income category (\$150,000+) are less likely than all other income groups to use their horses in natural horsemanship.

Competitions (Figures 11-13)

Survey participants indicate competing just over 5 times in 2009. Those respondents living in zip code region 7 competed more than those in all other geographic locations on average. As one would expect, respondents in the highest income category competed more often than all others, and those with incomes of \$75,000 or greater competed in significantly more shows than those with incomes less than \$75,000. Finally, the average number of competitions that a respondent competes in falls significantly as the respondent ages.

There is some evidence that those with incomes of \$75,000 or greater competed more in 2009 than in 2007 and that those with incomes of \$150,000 or greater expect to compete more in 2011 than they did in 2009. Older respondents are more likely to remain at the same number of competitions both from 2007 to 2009 and from 2009 to 2011; those in the younger age groups appear significantly more likely to experience a change in their participation, whether that change be an increase or a decrease.

Horsekeeping Costs (Figure 14)

Many changes have taken place in the general economy in the past few years, and anecdotally, the cost of maintaining a horse has increased as a result. To obtain a better understanding of if and how increased costs have affected horse handlers, survey participants were asked questions of this nature. Furthermore, those affected by increased costs were asked to indicate potential ways in which they would handle any changes.

First, 73.8% of the respondents say that they are spending more money per horse now than in 2007. Feed of all types, including hay and concentrate, was identified by the most respondents as having become more expensive. The increase in feed costs was identified significantly more often by individuals residing in zip code regions 3 and 7. Over 50% of the respondents indicate that their fuel costs (which may impact activities such as transportation and pasture maintenance) have increased as well, especially in zip code region 7. Veterinary and farrier services were the next two most frequently identified sources of increased costs, but there was no difference in the change in these costs geographically.

Unsurprisingly, nearly 70% of the respondents expect their horsekeeping expenses to increase in the next two years, while only 5% expect them to decrease. As a consequence, horse handlers will have to find different ways to cope with these expected increased costs. Most respondents (70%) indicate that they will reduce expenditures in other areas of their lives to cope with the increased horsekeeping costs; however, respondents with incomes of at least \$150,000 are significantly less likely than all others to reduce other expenditures. 30% of the respondents indicate that they will find other sources of income, while 25% percent say that they will likely reduce the number of horses they maintain. Somewhat surprisingly, only 8% indicate that they might pursue cost-sharing measures like half-leases; those residing in zip code regions 0 and 1, on average, were more likely to consider partial leases as a possibility.

Issues Facing the Equine Industry (Figures 15 & 16)

Like any other industry, a variety of issues pose challenges to the equine industry in the present and going forward. To obtain a better understanding of how those who own, lease, and manage horses perceive the various challenges, respondents were asked to identify the top three issues facing the equine industry.

Nearly 63% of the respondents indicate that the problem of unwanted horses (and what to do with them) is one of the top three issues. The cost of horsekeeping (44.4%), the loss of trails and riding areas (35.3%), owners who don't understand horses (30.2%), and the lack of the option of slaughter (30.0%) were the next most frequently identified issues. Less than 20% of respondents indicate that inappropriately trained horses, horses going to slaughter, the lack of a unified voice in Washington, D.C., the lack of marketing to attract new participants, ineffective welfare laws, overburdened welfare groups, and the lack of education materials are top issues.

Some of these issues, such as unwanted horses, are equally important across the country. The cost of horsekeeping appears to be significantly more relevant to those respondents in parts of the Northeast (zip code region 0). On average, respondents become significantly more concerned with the loss of trails and riding areas (and the related issue of the competition for open spaces) moving west, with the most concern being among those living in the West and Southwest. Respondents with incomes of at least \$75,000 are also more likely to indicate this as a major issue, as are older respondents. In general, those living in zip code region 1 are less likely to be concerned about the slaughter issue than all others. There are many significant geographic differences regarding the issue of the lack of the option of slaughter; respondents are more likely to identify this issue as important as one moves inward from both coasts. Moreover, respondents with incomes of at least \$125,000 are less likely to indicate that lack of the option of slaughter is a major issue. Another interesting result is that respondents living in zip code region 7 are significantly more likely than all others to be concerned about both the lack of a unified voice in Washington, D.C., and the lack of marketing to attract new participants to the horse industry, as are older respondents.

While less than 20% of the respondents identify horses going to slaughter as one of the top three issues facing the horse industry, respondents ages 18-24 are significantly more concerned about this issue than any other age group. In general, this age group is also significantly more concerned about the related issue of the lack of the option of slaughter than any other age group.

When asked to identify the most urgent issue facing the equine industry, 30% of respondents point to unwanted horses. The next most urgent issue, as indicated by 18% of respondents, is the related issue of not having the option of slaughter. The other issues identified received between 0% and 8% of respondents votes.

Respondents were also asked to propose a solution to the top issue they selected. Nearly $\frac{3}{4}$ of the respondents provided a potential solution for their issue of choice. The first 3,752 responses were analyzed. In this document, the most commonly reported responses are provided. Among the 3,752 respondents whose suggestions were analyzed, 22.1% of individuals feel that the option of slaughter should be available, although many indicate that they would not use that option themselves. 2.9% of these respondents feel that slaughter is not a viable alternative and that it should continue to be banned. 10.6% feel that some type of breeding

restrictions or regulations is needed, although breed registries would have to consider anti-trust issues when doing so. One solution may be for breed registries to adopt stricter approval standards. For example, many warmblood and sport horse registries hold some type of licensing or approval event, where horses are judged on qualities including conformation, gaits, ability, character, temperament, willingness to work, and ridability before being admitted into the stud book. Such standards should promote breeding for quality rather than quantity. The other most commonly proposed solution centered on education. 9.7% of the respondents in the subsample suggest improved education not only among those who breed horses, but also for those that care for horses. The remaining responses were quite varied; the full set of responses is included in an Excel file.

Horse Health Care

To end the survey, respondents were asked a series of health care questions related to the horses they own, lease, and manage.

While those who maintain their horses on their own property are likely to make horse health care decisions themselves, a variety of individuals make these decisions when horses are boarded. Nearly 68% of those who board their horses make the health care decisions for their horses, and nearly 30% indicate that a combination of suggestions from their barn manager, their vet, and their own ideas are considered. Very few respondents (less than 2%) indicate that barn managers or veterinarians are solely responsible for horse health care decisions.

Vaccinations

The first set of horse health questions focused on vaccinations. Nearly 96% of survey participants indicate that their horses receive at least one vaccination. Moreover, 78% of respondents indicate that their veterinarian is involved in giving vaccinations to the horses. Over 70% of respondents vaccinate their horses against Tetanus, West Nile Virus, Western and Eastern Equine Encephalomyelitis, and Rabies. Less than 30% of respondents vaccinate their horses against Herpesvirus. While not offered as an option, many respondents also indicated that they vaccinate their horses against Rhinopneumonitis.

Over 80% of respondents purchase vaccines from their veterinarian, while local stores, catalogs, and online websites are used as well (albeit infrequently).

Deworming

The second set of horse health questions focused on deworming. 99% of respondents indicate that they do deworm their horses, but unlike the results related to vaccinations, less than 16% indicate that their veterinarians are involved in deworming. 96% of respondents use tube or paste dewormers; in addition, nearly 10% incorporate daily dewormers into their horse care routine.

Ivermectin is the most frequently used dewormer (88.7%), followed by Pyrantel Pamoate (54.9%), Fenbendazole (38.9%), and combination dewormers (34.7%). Praziquantel is used by 28% of the respondents, Moxidectin by 23.5%, and Oxybendazole by 20.6%.

Respondents most frequently purchase dewormers at their local feed and tack store (43.6%) and online (25.8%). 14.8% purchase their dewormers from catalogs, and only 8.5% use their veterinarians as a source of purchasing dewormers.

Horse Health Information (Figures 17 – 19)

The final set of horse health questions focused on where individuals get their horse health information, how they prefer to receive it, and what horse health issues concern them the most. Each of these will be addressed in order.

Unsurprisingly, nearly 91% of respondents get horse health information from their horse health care provider, the veterinarian. Magazines (75.4%) and online websites (73.7%) are also frequently accessed for horse health information. Nearly 2/3 of the respondents sometimes refer to their friends or other horse owners for information, and 50.2% also get information from their farriers. No geographic trend in how respondents get their horse health information appears to exist. However, respondents in the lowest income group (under \$50,000) are significantly less likely than all others to use magazines and their veterinarian.

Respondent age also explains differences in how individuals received their horse health information. Respondents age 35 and up are significantly more likely to get this information from magazines. Respondents above 65 are least likely to get information from their friends. Respondents aged 25-55 are significantly more likely than the 18-24 group and 65+ group to get horse health information online. Finally, respondents aged 18-24 are less likely than all others to get information from their veterinarian.

Individuals participating in the survey prefer to receive their horse health information in a wide variety of ways. 65.1% of responders prefer to receive their horse health information live, with their questions being answered either in person or live online. Respondents also prefer reading short articles, either online (58.8%) or in print (57.9%). 45.2% prefer attending lectures. Long articles and videos are preferred by the fewest number of survey participants.

Interestingly, respondents in zip code 7 are less likely than all other respondents to prefer receiving horse health information from a lecture. No other predictable geographic differences exist, and there are no predictable differences by income.

Unsurprisingly, age is a determinant in how respondents prefer to receive their horse health information. There is some evidence that respondents age 35-64 are more likely to prefer print articles, whether they are short or long. Respondents age 65+ are significantly less likely than all others to prefer both long and short online articles; respondents age 18-24 are also less

likely to prefer short online articles. Research articles in print are increasingly preferred by older respondents, and research articles found online are *least* preferred by respondents age 18-24. These same respondents are more likely than all others to prefer long videos, while respondents age 65+ are less likely than all others to prefer short videos. Finally, an individual is less likely to prefer to receive horse health information live as (s)he ages.

Finally, respondents were asked to identify the horse health issues that most concerned them. 65% indicate that joint problems are a concern, and 52.6% indicate that care of the senior horse is a concern. Given that survey participants own an average of two senior horses, it is of little surprise that this is a salient issue. Other lameness issues, laminitis, and parasites are all identified by over 30% of respondents as a concern. Fewer respondents have concerns about diseases, perhaps because the use of vaccinations is so prevalent.

Summary

A major objective of this study is to provide a general picture of past, present, and future participation in the equine industry, where participation is characterized by owning, managing, leasing, and competing horses. Many of the questions in the survey were targeting to this objective, and three main results can be identified as follows:

- 1) Over half of the respondents (and sometimes up to over 80% of the respondents) have remained at the same level of participation in the horse industry in the past two years, and over half expect to remain at the same level of participation over the next two years. Respondents age 45 and up are most likely to remain at the same level of participation.
- 2) When examining the trends from 2007-2009, the general result is that the likelihood of increased participation is decreasing in the age of the respondent but increasing in income levels. Moreover, age is more influential than income in predicting this trend. In addition, the likelihood of decreased participation is decreasing in the age of the respondent. This suggests that levels of participation are more stable among older respondents.
- 3) For the expected trends from 2009-2011, we again find that the likelihood of increased and decreased expected participation is decreasing in age; however, income is largely insignificant in predicting future levels of participation.

To summarize these main points, the majority of the respondents in this survey expect to remain at the same level of participation over the course of the next few years, with roughly similar proportions expecting their participation to either increase or decrease. So, based on the results in the survey, the aggregate amount of participation is likely to remain roughly the same, although increases will be observed in some areas and decreases will be observed in others.

Those that handle horses acknowledge a host of challenges facing the industry going forward, and they are opinionated on the best way to adapt to these challenges. Given that over 50% of the respondents indicate that unwanted horses, horses going to slaughter, or not having the option of slaughter is the top issue facing the equine industry, it is unsurprising that many of their proposed solutions directly address the controversial topic of slaughter. In the subsample of comments analyzed, nearly eight times as many respondents support having the option of slaughter available as those who support the ban on slaughter, although many also point out that they would not use that alternative themselves. Also, stricter breeding regulations and better education are also advocated as potential solutions; these ideas are likely to be the most influential to the long run well-being of the horse industry.