

Results from 2012 AHP Equine Industry Survey

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American Horse Publications (AHP) conducted its second online nationwide equine industry survey from March 5th, 2012, through May 20th, 2012. The objectives of this survey are to gauge participation trends and management practices in the U.S. equine industry, to identify critical issues facing the equine industry as perceived by those who own or manage horses, and to better understand issues pertaining to horse health and nutrition. Upon the conclusion of the survey, 11,320 responses were collected. After removing duplicates, respondents from outside the U.S., and non-horse owners or managers, there were 10,539 usable responses. 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 summarize the results from the six main sections of the survey: demographics, horse ownership, horsekeeping costs, issues facing the equine industry, horse nutrition, and horse health care. Complete results from each question are available in an Excel file from AHP; in addition, results below referring to Tab 1, Tab 2, etc., are available in a supplementary Excel file from AHP.

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 and 55-64 years age groups are most highly represented, with each accounting for 26.2% of the respondents. Overall, 61.2% of respondents are age 45+. 90.8% of the respondents are female. The distribution of responses geographically is somewhat uniform. 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 16.9% of the responses; the smallest number of responses came from zip code region 6, which constitutes 6.2% of the responses. 49.2% of the survey participants had reported annual household incomes (before taxes) of less than \$75,000; 12.7% of the respondents had annual household incomes of at least \$150,000.¹

¹ 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 more likely to have respondents with incomes less than \$50,000 and less likely to have respondents with incomes of \$150,000 or above. This is similar to the 2009-2010 study.

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 2.57 members; 92.9% of the respondents live in households with no more than 4 members. The average number of household members involved with horses is 1.75, and 85.2% 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 respondents are involved with the horse industry. 92.3% of the respondents indicate that they are horse owners, and 20.9% identify themselves as barn/farm managers. Just under 50% indicate that they ride for pleasure, and 34.9% indicate that they ride competitively. More than 15% of respondents indicate that they are breeders, riding instructors, and/or trainers.

Respondents were asked to identify the number of horses they owned and/or managed in four different age groups: foals (less than 1 year old), young horses (1-4 years old), mature horses (5-15 years old), and senior horses (16+ years old). Respondents in the survey own an average of 0.36 foals, 1.15 young horses, 4.1 mature horses, and 2.77 senior horses. 22.8% of respondents indicate that at least one horse is insured, with the highest frequency of insured horses occurring in zip code region 2 (25.63%) and the lowest frequency occurring in zip code region 8 (16.35%).

One of the objectives of this survey is to continue to understand, on a national level, how respondents' participation with horses and in the horse industry has changed and how they expect it to change in the future. Initially, the focus is on trends in the number of horses owned and/or managed.

Horses Owned/Managed (Tabs 1 – 3)

65.5% of the respondents indicate that the number of horses they currently own is the same as it was last year. About 17% of respondents own more horses than they did last year, and the remaining 17% own fewer horses than they did last year. This result may suggest some stability compared to the 2009-2010 survey, where 47% of respondents either owned/managed more or fewer horses than they did two years hence. When considering their future expectations on horse ownership, 66.7% of respondents expect to own/manage the same number of horses next year. Of those who expect the number of horses owned/managed to change, 18.7% expect to own more horses in 2013, while 14.7% expect to own fewer horses.

When considering the number of horses owned/managed geographically, the average number of horses owned/managed increases as one moves away from the coasts and toward the center of the U.S., with the average number of horses owned/managed peaking at 9.9 in zip code region 7. Furthermore, individuals in the highest two income brackets own significantly more horses on average than all other income levels. Finally, the average number of horses owned/managed is roughly equal across age groups.

The highest percentage of respondents owning/managing more horses in 2012 than in 2011 are in zip code regions 3 (20.98%) and 7 (19.76%). The highest percentage of respondents managing fewer horses in 2012 than in 2011 are in zip code regions 6 (21.36%) and 7 (21.63%). The highest percentage of respondents expecting to own/manage more horses in 2013 than in 2012 are in zip code regions 4, 5, and 6 (20.00%, 20.05%, and 19.60%, respectively). The highest percentage of respondents expecting to own/manage fewer horses in 2013 are in zip code regions 7 and 5 (20.51% and 17.39%, respectively).

Respondents in the top 2 income categories reported a higher frequency of owning/managing more horses than they did in 2011, while respondents in the lowest income category were most likely to own/manage fewer horses than they did in 2011. However, those same respondents were most likely to expect to own/manage more horses in 2013.

When analyzing the trends in horse ownership by age, some interesting results emerge. The frequency of owning/managing more horses in 2012 than in 2011 is decreasing by age category; 26.6% of respondents in the 18-24 age category report owning/managing more horses in 2012 than in 2011, while only 9.9% of respondents in the 65+ age category report owning/managing more horses. This pattern is also consistent with expectations on horse ownership in 2013. 30.37% of respondents in the 18-24 age category expect to own/manage more horses in 2013 than they do this year, and this diminishes to 10.82% of respondents in the 65+ age category.

One other interest of issue is whether respondents had been given any of the horses in their care; almost 35% respond in the affirmative. This is a statistically significant increase from the 31.9% that responded affirmatively in the 2009-2010 study. Those in the lower income

categories are more likely to have had at least one horse given to them, and overall, those in lower age groups are also more likely to have been given a horse.

Services

Next, respondents were asked general questions regarding the types of services for which they pay. These services represent a common mechanism through which funds are exchanged in the equine industry, and it is important to understand to what extent these services are utilized. While 80.8% of respondents indicate that they care for their own horse (in terms of feeding, watering, and cleaning), 41.0% board their horses on someone else's property. In addition, 41.8% pay for riding lessons, and 33% pay for someone else to train their horse.

Use of Horses (Tabs 4 - 6)

In addition to identifying their involvement with the horse industry, survey participants were asked to identify all ways in which they used their horses. 73% of the respondents at least sometimes use their horses for pleasure/trail riding. After pleasure/trail riding, the next most commonly identified use is dressage, which was reported by 26.3% of respondents. Using horses for lessons or training and natural horsemanship represent the other most frequently reported uses.

The use of horses depends on respondents' geographic location. Tabs 4 and 5 ranks the frequency of each use geographically as well as the ranking of zip code region within use according to frequency. Tab 6 illustrates the geographic differences across all uses. To briefly summarize the results, it appears that many of the English disciplines are more highly represented towards the eastern side of the U.S., whereas many of the Western disciplines are more highly represented towards the western side of the U.S.

Competitions (Tab 7)

Survey participants indicate that they expect to compete in an average of 5.36 events in 2012. This is similar to the average number of competitions reported in the 2009-2010 study. Respondents living in zip code region 7 report competing more than those in all other geographic locations on average. In addition, the average number of competitions is increasing across income groups and decreasing across age groups.

There is some evidence that those with incomes of \$125,000 or greater competed more in 2012 than in 2011. Those in the younger age groups appear significantly more likely to have competed more in 2012 and expect to compete more in 2013.

Horsekeeping Costs (Tab 8)

To obtain a better understanding of how increased costs have affected horse handlers, survey participants were asked to identify areas in which costs of horsekeeping had increased the

most. In addition, they were asked to indicate potential ways in which they would accommodate any cost increases.

First, respondents were asked to identify up to three areas in which the costs associated with horsekeeping have increased the most. 81.8% of the respondents say that feed of all types, including hay and concentrate, has become more expensive. The increase in feed costs was identified as an issue significantly more often by individuals residing in zip code regions 3, 7, 8, and 9. 71.4% of the respondents indicate that their fuel costs (which may impact activities such as transportation and pasture maintenance) have increased as well, although the frequency of increased fuel costs are significantly less in zip code regions 0 and 1. Next, 31.4% of the participants indicated that veterinary services was a source of increased costs, but there was little difference in the change in these costs geographically. Relative to the 2009-2010 AHP survey, the top 3 sources of increased costs have remained the same; however, significantly more respondents identified both feed and fuel as contributing to increased costs in the current study, whereas significantly fewer identified veterinary care as a factor.

Because costs continue to increase, owners and managers will have to find different ways to cope with these expected increased costs. Most respondents (68.1%) indicate that they will reduce expenditures in other areas of their lives to cope with the increased horsekeeping costs. 32.8% of the respondents indicate that they plan on attending fewer competitions. Over ¼ of the respondents indicate that they will find other sources of income or reduce the number of horses they maintain. Partial leases are still not very attractive; only 10% indicate that they might pursue cost-sharing measures like half-leases. These responses have changed little since the 2009-2010 study.

Issues Facing the Equine Industry (Tabs 9 – 11)

A variety of issues pose challenges to the equine industry in the present and going forward. One objective of the current study is to gain a better understanding of how those who own and/or manage horses perceive the various challenges; to this end, participants were asked to identify the top three issues facing the equine industry.

Nearly 56% 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 (47.1%), overbreeding (37.3%), owners who don't understand horses (29.3%), the loss of trails and riding areas (27.6%), and the lack of the option of slaughter (24.8%) were the next most frequently identified issues. Less than 20% of respondents indicate that competition for open spaces from developers or other agricultural uses, disease outbreaks, 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, the possibility of slaughter houses re-opening in the future, and the lack of educational materials are top issues.

The importance of these issues sometimes depends on respondent demographics. Some of the identified trends are discussed below.

While the unwanted horse issue appears to be equally relevant across the country, it appears that the cost of horsekeeping is of more concern to those on both coasts. Overbreeding and owners who don't understand horses are identified as important issues roughly equally across the country. Loss of trails and riding areas is most salient to respondents residing in zip code region 9 and least salient to respondents residing in zip code region 7. Finally, there is an interesting pattern among those who feel that not having the option of slaughter in the U.S. is important; respondents in zip code regions 5-8 indicate an increased concern relative to other areas of the country.

Among the top 6 issues identified, there are also some interesting patterns in responses based on age of the respondents. First, the youngest respondents are most concerned about overbreeding; this decreases across age categories. Loss of trails and riding areas becomes of increasing concern as age increases. Finally, the issue of owners who don't understand horses is of greatest concern in the youngest age category and is decreasing across categories.

Survey participants were then asked to select one issue which deserves the most urgent attention. 24.1% of respondents identified the problem of unwanted horses, and what to do with them, as the most pressing issue. The next most urgent issue, as indicated by 14.5% of respondents, is overbreeding. The third more urgent issue is not having the option of slaughter, which was identified by 12.8% of respondents.

Respondents were also asked to propose a solution to the top issue they selected. The issues and responses are too broad to be discussed in any detail here; however, the full set of responses is included in an Excel file.

Horse Nutrition

The next set of questions focused on equine nutrition, and specifically related to feed and supplements. This set of questions is new to the 2012 AHP Equine Industry Survey.

Feed

81% of the respondents indicate that they make their horses' feed buying decisions themselves, with the barn manager/owner coming in a distant second at about 8%. Veterinarians are identified as having the most influence on feed buying decisions, followed by a nutritionist or consultant. On the other hand, celebrity endorsements are rated as having the least influence.

Survey participants were asked what brands of feed they use and how long they have used them. Response rates were low (< 50%) for any given brand. However, the greatest number of respondents responded to Purina, and of those, nearly 50% said they had used a Purina-brand feed for more than 5 years. Just under 10% indicated they had never used a Purina-

brand feed. Nutrena attracted the second greatest number of respondents. Among those, almost 28% said they had used a Nutrena-brand feed for more than 5 years, and just over 21% indicated that they have never used a Nutrena-brand feed. The full set of responses for all brands of feed is available in the Excel file.

The most commonly used feed form was pelleted (less than ½” diameter), which is always used by over 56% percent of respondents. The least commonly used feed forms are cubed and extruded (greater than ½” diameter) which have never been used by about 70% of respondents.

The majority of respondents (over 75%) purchase their feed at a locally-owned feed store, with chain stores representing the second most common site for purchasing feed (over 25%).

Respondents were also asked to rank factors in choosing a feed supplier. According to the rating averages, when choosing a feed supplier, respondents value product availability most highly, followed by convenience, relationship, and one-stop shopping. Being able to have feed delivered is rated as the least important quality.

Supplements

Over ¾ of respondents indicate that they use nutritional supplements. As with feed buying decisions, veterinarians are rated as having the most influence on supplement buying decisions, followed by nutritionists/consultants; again, celebrity endorsements are rated as having the least influence.

The most common use of a nutritional supplement is for joint support (62.4%), followed by hoof health (48.8%), trace mineral supplementation (39.9%), coat condition (36.8%), and digestive tract support (31.3%). All other uses were identified by less than 30% of respondents.

Respondents are equally likely to purchase nutritional supplements from locally-owned feed and tack stores and from online sources (about 50% each). Catalogs and chain stores are also common sources for nutritional supplements (about 25% each).

Finally, survey participants were asked to rank the reasons why they use the nutritional supplements they currently give their horses. According to the rating averages, when choosing which supplements to purchase, the most important reason for purchasing any supplement is because the respondent thinks the horse needs it, followed by veterinary advice and trust of the supplier. The least important reasons are trainer recommendation or recommendation from some other person.

Horse Nutrition Information and Concerns

Respondents were asked questions relating to where they receive their horse nutrition information and how they prefer to receive it. Nearly 67% of respondents get nutrition

information from their veterinarian, followed by websites (56.1%) and friends or other horse owners (43.8%).

Horse owners and managers prefer to receive their equine nutrition information through face-to-face interaction (53.9%), which is closely followed by reading short articles online (52.5%). Respondents also frequently read research reports online (45.2%) as well as short articles in print (42.4%). The least preferred form of obtaining information is watching long videos (4.4%).

Finally, respondents were asked to identify any and all equine nutrition issues that concerned them. Joint longevity received the most votes (65.4%). Hoof condition (57.1%), care of the senior horse (53.6%), colic (40.3%), and digestive efficiency (40.0%) were the next most frequently identified.

Horse Health Care

Those who maintain their horses on their own property are likely to make horse health care decisions themselves; however, when horses are boarded, health care decisions are often made by more than one person. Over 66% of those who board their horses make the health care decisions for their horses, and over 24% indicate that a combination of suggestions from their barn manager, their vet, and their own ideas are considered. Very few respondents (less than 2% each) indicate that barn managers or veterinarians are solely responsible for horse health care decisions. These responses are similar to those in the 2009-2010 study.

Finally, respondents were asked a series of health care questions related to vaccination and deworming management strategies.

Vaccinations

Nearly 75% of respondents indicate that their veterinarians are involved in determining their horses' vaccination schedules. Veterinarians administer the vaccines nearly 60% of the time, followed by horse owners/managers themselves (34.7%).

For West Nile Virus, Western and Eastern Equine Encephalomyelitis, Tetanus, Rabies, Equine Herpesvirus, and Equine Influenza, a majority of respondents vaccinate once a year (58% - 71%, depending on the vaccine). However, it is not uncommon for those diseases to be vaccinated against twice a year (over 20%). One exception seems to be Strangles; only 44% of respondents vaccinate against Strangles once a year, and nearly 40% of respondents never vaccinate for Strangles. 4.1% of respondents indicate that they do not vaccinate their horses.

Over $\frac{3}{4}$ of respondents purchase vaccines from their veterinarian. Unsurprisingly, veterinarians are overwhelmingly the largest source of influence on the decision to purchase vaccines.

Deworming

The second set of horse health questions focused on deworming. When asked how often an individual deworms their horses, the most common responses (which occurred in roughly equal percentages) are four times per year and every other month (or 6 times per year, which corresponds to the standard rotational worming management strategy). Only 0.6% of respondents indicate that they never deworm their horses. Respondents also chose the "Other" category often (14.3%), and the most common responses were "As needed, based on fecal egg count" or "I use a daily dewormer."

Over 88% of respondents deworm the horses in their care themselves; 6.7% have their barn managers deworm. Nearly all horse owners and managers that deworm their horses use a tube/paste dewormer (97.2%); a decreasing percentage (5.7%) are using a daily dewormer. In addition, over 83% of those that use a daily dewormer also use a tube/paste dewormer. 44.3% of respondents (up from 15.7% in the 2009-2010 study) indicate that their veterinarian is involved in developing their horses' deworming schedules.

Nearly 80% of respondents indicate that they are concerned about drug resistance in parasites. About 50% indicated that their veterinarian had recommended a fecal egg count; about 50% had actually had a fecal egg count performed.

Ivermectin is the most frequently used dewormer (77.5%), followed by ivermectin/praziquantel (66.4%), pyrantel pamoate (57.8%), and fenbendazole (54.6%). Moxidectin (28.6%), moxidectin/praziquantel (24.3%), oxbendazole (23.1%), and pyrantel tartrate (9.8%) are used less frequently.

Nearly 60% of respondents most frequently purchase dewormers at local feed stores; online websites are the second most frequently identified source for purchasing dewormers (45.4%). Veterinarians have the largest source of influence on which dewormers are purchased (38.6%); in addition, price is a common determinant in which dewormers are selected (20.9%).

Summary

As stated earlier, the objectives of this survey are to gauge participation trends and management practices in the U.S. equine industry, to identify which issues currently facing the equine industry are perceived as being most critical among those who own or manage horses, and to analyze issues pertaining to horse health and nutrition. Results from some of these sections can be compared to the 2009-2010 AHP Equine Industry Survey.

Three main results can be identified from this study, and they are outlined below.

- 1) About 2/3 of the respondents own or manage the same number of horses as they did in 2011, and roughly the same proportion expect to own or manage the same number of horses in 2013. Among those who have a different number of horses

(or expect to have a different number of horses), they are evenly divided between more and less. These results may indicate a greater level of stability in the number of horses owned/managed compared to 2 years ago. In addition, it appears that participants in the youngest age groups are increasing the number of horses they own/manage.

- 2) Based on results from the study, it appears that horse owners/managers are beginning to increase the number of competitions they attend. While the average number of competitions in 2012 is about the same as the results from the 2009-2010 study, a greater percentage competed more in 2012 than in 2011, and almost 90% of respondents plan on competing the same amount (56.2%) or more (32.9%) in 2013. Most of the increase in competitions is occurring among the younger age groups and higher income groups.
- 3) Veterinarians play an integral role in nearly every facet of caring for horses. Not only are they influential in decisions regarding nutrition, they play a large role in vaccination decisions and are becoming more involved in deworming strategies as well.

Finally, one benefit of administering a survey aimed specifically towards horse owners/managers is the ability to obtain a better understanding of how those that handle horses on a daily basis perceive the biggest challenges facing the industry. Unsurprisingly, the unwanted horse issue (and what to do with them) is still the most important issue facing the industry today, even 4 years after the great recession of 2008. To solve the problem, respondents suggest a variety of alternatives, including providing humane slaughter, low cost euthanasia and castration clinics, and regulated breeding (including more widespread licensing of stallions, mares, and even breeders). As in the 2009-2010 study, slaughter is one of the most discussed alternatives. Among respondents that mentioned something with regard to slaughter, over 9 times as many respondents were in favor of slaughter as those against it (for comparison, in the 2009-2010 study, about 8 times as many respondents were in favor as those against it). However, among those who stated they were either for or against slaughter, many indicated that if slaughter plants re-open, humane conditions (including transport) must be mandated.

The cost of horsekeeping was identified as the second biggest challenge facing the industry. Solutions to this issue may be more difficult to achieve, because many are outside the control of those in the horse industry. There is little horse owners/managers can do about fuel prices. However, some respondents suggest a change in the “business” model of caring for horses, including the creation of regional hay-buying co-ops and incentivizing hay producers to keep hay more local rather than exporting it.

In closing, the equine industry continues to face many challenges, but it appears that the industry is beginning to recover from the great recession of 2008, as indicated by the percentage of respondents participating in the industry, either through owning/managing horses or competing them, at the same or greater levels than two years ago.