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AMERICAN HORSE PUBLICATIONS *FOR THE RECORD*
NOVEMBER 2009



AHP FOR THE RECORD NOVEMBER 2009 ISSUE

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NEWS FROM THE HOME OFFICE POST-RECESSION PREDICTIONS AND INSIGHTS

BY: JEREMY LAW, AHP EDITOR

With the new year just around the corner, who doesn't want to know how best to position ourselves and our marketing?

POST-RECESSION PREDICTIONS

In an enlightening article at ClickZ.com, marketing strategist Tessa Wegert discusses her predictions for digital marketing in 2010.

Among Wegert's predictions:

- It's no secret that user and customer information is valuable, but it's becoming even more so as the need for well-targeted digital advertising has increased. Not knowing much about potential customers can mean missing revenue—or an untimely demise—for some online businesses
- Mobile application advertising is still a growing opportunity for advertisers. Many free applications for the iPhone, for example, survive on embedded ads that can be switched out remotely as advertisers' campaigns change
- New ad sizes and standards aim to promote increased interaction as they encourage consumers to share advertising as they do news stories or funny videos

Read Wegert's detailed predictions in the entire article available at <http://www.clickz.com/3635686>



INSIGHTS FOR 2010

The following article appeared in a recent e-newsletter from MediaPost.com, and was kindly forwarded to us. It's an interesting piece from a marketing strategy and research firm, Decitica, and could supplement our ever-changing perspectives on "post-recession" marketing.

The article appeared in the MediaPost e-newsletter's "research" section. To keep things in perspective, we have taken MediaPost's disclaimer from the end of the article, enlarged it and placed it immediately below.

"We use the term 'research' in the broadest possible sense. We do not perform an audit, nor do we analyze the data for accuracy or reliability. Our intention is to inform you of the existence of research materials and so we present reports as they are presented to us. The only requirements we impose are that they are potentially useful and relevant to our readers and that they pass the rudimentary test of relying on acceptable industry standards. We explicitly do not take responsibility for the findings. Please be aware of this and check the source for yourself if you intend to rely on any of the data we present."

The Recession's Lasting Effects on Consumers

A new study, entitled "Marketing to the Post-Recession Consumers," by Decitica, addresses the lasting effects of the recession in the way American consumers have internalized the recession experience. It's particularly relevant in developing "positioning" and marketing/merchandising/advertising strategies.

Dr. Val Srinivas, Principal at Decitica, says, "This research... decisively shows that marketers need a fresh lens through which to view consumers in the post-recession world..."

Specifically, this research concludes that:

- The effects of the Great Recession on consumer behavior are so profound that many of the assumptions underpinning consumer segmentation are no longer valid; and
- Marketing strategies that do not fully recognize the diversity of consumers' recession experiences won't have the desired potency in the post-recession world
- Many have accepted this radical change as the "new normal," and not just a cyclical phenomenon
- The recession has caused a profound, deep-rooted change in consumers' spending habits in favor of a more restrained approach
- There are four distinct consumer segments emerging from the recession according to the study, identified as:
- Steadfast Frugalists
- Involuntary Penny-Pinchers
- Pragmatic Spenders and
- Apathetic Materialists

Steadfast Frugalists are committed to self-restraint, engaging in prudence with unequivocal enthusiasm. They make up about

one-fifth of the American consumers, representing all income and age groups. 80% of Steadfast Frugalists say the new behaviors they have adopted will likely stay with them for a long time. This is in contrast to 24% of Apathetic Materialists who feel this way.

The main characteristics of the Steadfast Frugalists are:

- 6 in 10 are women
- Composed of people from all age groups; however, fewer from Gen X and Gen Y. The most disciplined in their behaviors and seriously committed to self-restraint many of these individuals deemed themselves tightwads even before the recession
- 29% of individuals in this group considered themselves tightwads in this survey

“Marketers will find this group to be the most challenging, as they are the least brand loyal and most likely to discount marketing messages,” notes Dr. Srinivas.

Involuntary Penny-Pinchers, about 29% of the population, have been severely affected by the recession, and are mainly made up of households with less than \$50,000 in income, with more women than men.

This segment has been forced to embrace thrift like never before. Presently, their actual behaviors do not differ widely from those of Steadfast Frugalists. Where they drastically diverge is in their aversion to expending effort in money-saving strategies. Only 17% find buying store or generic labels to be satisfying, compared to 59% of Steadfast Frugalists.

77% of Involuntary Penny-Pinchers admit to being more scared by the recession, 81% stressed, and 87% more worried about the future than other groups. The main characteristics are:

- 6 in 10 are women
- Over-represented by people in their 30s and 40s
- Involuntary Penny-Pinchers are the most severely affected, financially and emotionally, by the recession
- Their new-found frugality for the most part has been forced upon them. Half have not saved any money for emergencies
- 38% in this group exceeded their income last year, indicating that they were not that disciplined to begin with
- Marketers will find this group to be quite challenging to influence mainly due to their lower/diminished capacity to spend

“Pragmatic Spenders are the most attractive group for marketers because of their higher spending power,” says Dr. Val Srinivas. “While it is true that they have also curbed their spending, they are the most capable, both psychologically and financially, to willfully resurrect their past spending patterns,” he added.

This group comprises 29% of consumers whose income has blunted the effects of the recession on this segment. Only 28% of Pragmatic Spenders feel the recession has changed what and how they will buy in the future, compared to 55% of Steadfast Frugalists. The main characteristics of this group are:

- 6 in 10 are men
- Over-represented by people in their 60s, and from the Northeast and West
- Over a third of the people with greater than \$75,000 HHI are in this group
- Pragmatic Spenders have the greatest capacity, both financial and psychological, to willfully resurrect their past spending patterns
- Their approach to spending is tempered with caution; they have cut back and are engaging in thrift like others but seem less troubled by the recession

- Pragmatic Spenders will be the most attractive to marketers given their above-average financial wherewithal

Apathetic Materialists seem least changed by the recession. They have not embraced the new frugality to the same extent as others and get minimal satisfaction from such behaviors. Only about 6% in this group find price comparison to be satisfying, in contrast to 85% in the Steadfast Frugalists camp.

The Apathetic Materialists segment has more men (55%) and younger consumers (72%) are below the age of forty. Only 8% admit to being very focused on value compared to 30% of Pragmatic Spenders and 52% of Involuntary Penny-Pinchers. The main characteristics are:

- 22% in the population
- Slightly more men than women
- Over-represented by people in their 20s (Gen Y)
- The least changed in terms of their spending habits and future intentions
- More younger, single people with limited disposable income at the moment
- Apathetic Materialists will be an attractive target for youth-oriented marketers

What makes this research particularly unique, says the report, is the examination of consumers’ self-efficacy (the belief in one’s abilities to successfully achieve certain outcomes) in practicing spending restraint. Evident from this chart is that Steadfast Frugalists and Pragmatic Spenders are the most confident in controlling spending, resisting the temptation to spend now and worry later, save money and stick to a budget. Apathetic Materialists have the least confidence in successfully restraining themselves,

Satisfaction from Frugal Behaviors and Self-Confidence in Practicing Restraint					
Behavior	Total	Steadfast Frugalists	Involuntary Penny-Pincher	Pragmatic Spenders	Apathetic Materialists
<i>Percent Who Find each Activity “Satisfying”</i>					
<i>Buying on sale or using coupons</i>	40%	87%	37%	34%	11%
<i>Buying store labels</i>	22%	59%	17%	15%	6%
<i>Shopping at discount stores</i>	29%	77%	24%	19%	8%
<i>Surfing the Internet for coupons & discounts</i>	30%	73%	24%	24%	10%
<i>Comparing prices before purchase</i>	35%	85%	32%	26%	6%
<i>Percent Who are Highly Confident in their Ability to Practice Restraint</i>					
<i>Resisting the temptation to spend now & worry later</i>	53%	87%	46%	73%	5%
<i>Saving money</i>	35%	70%	18%	54%	5%
<i>Sticking to budget</i>	44%	87%	46%	73%	5%

Source: Decitica, November 2009

Self-Efficacy Income, Gender and Age Differences

- Age is positively correlated with self-efficacy in controlling spending
- Both men and women 40 years or older, irrespective of income, are significantly more confident about restraining spending
- 40+ women with greater disposable income are the most confident about resisting the temptation to spend now and worry later, indicating they are more long-term focused
- This finding is not good news for marketers whose traditional audience are mainly boomer women

Percent Who are Highly Confident in Controlling Spending			
Income Group	Gender	Age	% Highly Confident
>\$75K	Females	21-39	37%
<\$75K	Females	21-39	42%
<\$75K	Males	21-39	43%
>\$75K	Males	21-39	47%
<\$75K	Males	40+	57%
<\$75K	Females	40+	58%
>\$75K	Males	40+	60%
>\$75K	Females	40+	61%

Source: Decitica, November 2009

Percent Who are Highly Confident in Resisting the Temptation to Spend Now and Worry Later			
Income Group	Gender	Age	% Highly Confident
<75K	Males	21-39	37%
<\$75K	Females	21-39	41%
>\$75K	Males	21-39	41%
>\$75K	Females	21-39	43%
<\$75K	Females	40+	63%
>\$75K	Males	40+	66%
<\$75K	Males	40+	67%
>\$75K	Females	40+	72%

Source: Decitica, November 2009

Price has become the dominant consideration in the purchase of all kinds of products, concludes the study. Of considerable significance is the fact that half of Pragmatic Spenders are looking at price before other features and one-third say that brand name products are not worth the extra price, heralding what will likely be a long uphill struggle by marketers to shift the focus away from price, says the report.

"I am the kind who first looks at price before I consider other features."	
Consumer Segment	% Who Agree
Apathetic Materialists	27%
Pragmatic Spenders	52%
Involuntary Penny-Pinchers	14%
Steadfast Frugalists	66%

Source: Decitica, November 2009

"I have come to realize that brand name products are not worth the extra price."	
Consumer Segment	% Who Agree
Apathetic Materialists	16%
Pragmatic Spenders	32%
Involuntary Penny-Pinchers	4%
Steadfast Frugalists	49%

Source: Decitica, November 2009

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To receive more articles like this as part of the MediaPost e-newsletter, visit www.mediapost.com and click "subscribe" in the drop-down under the "publications" tab.

ABOUT THE COVER



Tracy Gantz is a freelance photojournalist and editor based in Southern California. Her work has appeared in such AHP publications as *The Blood-Horse*, the *Paint Horse Journal* and *Paint Racing*, *California Thoroughbred*, *Appaloosa Journal*, *Performance Horse*, and *John Lyons' Perfect Horse*. She writes and photographs in all disciplines and is a past president of AHP.

Tracy's photo was taken at a Hunter Jumper horse show at the Encanto Equestrian Center in Duarte, California.

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AHP NEWS

MARK YOUR CALENDARS!



January 15, 2010 - 2010 AHP Student Award Contest

Eligible students may access guidelines and application at the AHP website at www.americanhorsepubs.org/students/student_award/index.asp



March 3, 2010 - 2010 Annual Awards Contest

In recognition of the current economic climate and its 40th Anniversary, the entry fee for the 2010 Annual Awards Contest has been reduced from \$30 to \$25 per entry. The deadline date for 2010 Awards Contest for material published in and dated 2009 will be on or before March 3, 2010.

June 17-19, 2010 - 2010 AHP Lexington Seminar

Celebrating its 40th Anniversary in Lexington only a few months before the 2010 WEG games gives AHP a unique opportunity to offer its members several special events. The pre-tour on Thursday will be an all-day event called "40 Ideas on Tour." Not only will attendees visit a farm, the Kentucky Horse Park, Woodford Reserve, and Keeneland, they will also receive printed facts sheets of ideas and resources that will make their visits educational as well as enjoyable. Following the bus tour, a welcome reception will be held at the Alltech Brewery located a few blocks from the Hilton Lexington Downtown hotel. Plans are underway to have both the tour and reception as sponsored events. AHP is asking members to participate in an online survey to help fine tune the topics for next year's seminar to be held on June 17-19. The survey is located on Survey Monkey at www.surveymonkey.com/s/8QBMF2C. Visit the Hilton Lexington Downtown, Lexington, Kentucky at www.lexingtondowntownhotel.com



June 2010 - Gabriele Boiselle to present 2010 Photoseminar following the AHP Seminar in Lexington.

Noted equine photographer, Gabriele Boiselle, is partnering with Equine Photographers Network (EPNet) to offer a three-day photoseminar following the 2010 AHP seminar in Lexington, Kentucky on June 17-19. Gabriele and Carien Schippers at EPNet have offered photoseminars for the past two years in the U.S., one in Saratoga in conjunction with the 2008 AHP seminar, and in Ocala during March, 2009. Details for the 2010 Lexington photoseminar are still being worked out, but updates will be announced as available on the AHP (www.americanhorsepubs.org) and the EPNet (www.equinephotographers.org) websites.



2011 Seminar

Catamaran Resort Hotel & Spa in San Diego. The Catamaran has offered AHP a rate of \$159 for a standard room. The rate includes complimentary wireless internet as well as other amenities. Located on beautiful Mission Bay and only steps from the Pacific Beach, the Catamaran offers AHP members an opportunity to experience a California beach community for an affordable price in 2011.



September 25 - October 10, 2010 - World Equestrian Games

Kentucky Horse Park
Lexington, Kentucky



Tickets to the 2010 Alltech FEI World Equestrian Games went on sale September 25, exactly one year before the Games arrive in Lexington, Kentucky.

Tickets on sale at www.alltechfeigames.com, www.ticketmaster.com/2010-Alltech-FEI-World-Equestrian-Games-tickets-Lexington/venue/180853 and at all Ticketmaster outlets.

Anyone with special needs, including ADA seating, may call the Ticketmaster hotline at 1-800-745-3000. No tickets will be sold in person or via phone at the World Games 2010 Foundation office or the Kentucky Horse Park.

Tickets for reserved seating will be available to each session of competition of the eight world championships of equestrian sport. The prices range from \$25 to \$150, providing a variety of options for every spectator.

Media Credentialing

To register to receive credentialing application information, please log on to www.feigames2010.org/mediaregister.aspx

Official Housing Bureau of the 2010 Alltech FEI World Equestrian Games

Krista A. Greathouse, CMP, Director of Events
2010 Alltech World Equestrian Games Housing Bureau
Short's Sports & Events
A division of Short's Travel Management
2010 World Games Way
Lexington, KY 40511
Phone: (859) 255-2010 Ext. 231
Fax: (859) 254-0179
kgreathouse@shortstravel.com

RENEW FOR 2010 - MEMBERSHIP CHANGES FOR 2010

Renewal notices for 2010 membership dues were sent in November. The Board has made several changes to membership categories to meet the needs of members and prospective members.

A new category of membership is **Digital Publication Member**. This category is for publications that are published as a digital edition only. The category may include a print publication that has converted to a digital only format or a publication started as a stand-alone digital publication. The 2010 annual dues are \$100.

There will no longer be a designation as an **International Member**. Membership in any category will be available to any eligible publication, individual, business or organization, student or website which shares an interest in the equine publishing industry in the United States and outside the U.S. The dues applicable to each membership category will apply.

The **Affiliate Membership** category will be renamed to **Individual Membership**, which better reflects the eligibility for this category that is issued to freelance writers, photographers or other individuals who provide a service to the equine publishing industry and supports the purposes and goals of AHP.

NEW USER-FRIENDLY LINK TO AHP EQUINE INDUSTRY SURVEY

To make it easier for horse owners to access the survey, AHP has created a more user-friendly URL (www.HorseSurvey.org) for all AHP members to use to encourage their equine publication readers, site visitors and equine product users to take part in a survey between now and January 15, 2010. What this means is all AHP members need to use any and all print and electronic means to encourage their audiences and customers to participate.

The participants will provide feedback on trends in the U.S. equine industry and other information regarding the most important issues facing our industry. Those eligible to participate in the survey are men and women, 18 years of age and older, who currently own, manage, or lease at least one horse and live in the United States.

This survey is anonymous. No one, not even members of the research team, will be able to associate information with responses. When the survey results are tallied, only aggregated results will be presented.



Any AHP member who participates in promoting the survey in print, electronically, or at live events will be eligible to receive the first release of survey results. Participating members should send either a screen capture that proves the release has been sent electronically or a PDF of the printed release to Chris at ahorsepubs@aol.com. If you do not choose to participate, you will receive results of the survey only after they have been published by the participating members.

The goal is to get 100,000—or more—horse owners to participate in this survey, but we need YOU to make this happen. This is a wonderful chance for AHP members to come together and gather information that can benefit us all, so spread the word!

The press release about the survey that you can use in your magazines, newsletters, and on your web sites is available at http://www.americanhorsepubs.org/news_updates/5385.asp. To promote the survey on your website and social media such as Twitter, FaceBook, etc., use this link <http://www.horsesurvey.org>

AHP thanks Intervet/Schering-Plough Animal Health and Pfizer Animal Health for sponsoring this survey.

AHP NEW MEMBERS

CORPORATE MEMBERS

American Competitive Trail Horse Association

Sanctioning and registry of trail rides

Contact: Tom Scrima

637 Soda Creek Road

Spicewood, TX 78669

Phone: 830-693-2065

Fax: 512-519-8453

toms@actha.us

www.actha.us

The American Competitive Trail Horse Association sanctions competitive trail riding venues throughout the USA.

Membership is required to ride. Up to 50% of ACTHA's proceeds go to horse charities.

Caballo Press of Ann Arbor

Publish children and adult books related to horses

Contact: Rudolph Alvarado

P. O. Box 415

Ann Arbor, MI 48106-0445

Phone: 734-678-7774

admin@caballopress.com

www.caballopress.com

Caballo Press of Ann Arbor publishes children and adult books related to horses. Our first book won the Dr. Tony Ryan Book Award. In 2010, we will publish three to five titles. Some of the profits from all four books go to support non-profit organizations related to horses.

Kentucky Performance Products LLC

Equine supplements

Contact: Karen Isberg

P. O. Box 1013

Versailles, KY 40383

Phone: 800-772-1988

Fax: 859-873-1163

kisberg@kppusa.com

www.kppusa.com

Established in 1998, Kentucky Performance Products provides research-proven nutritional supplements to horsemen and veterinarians. KPP products are formulated to complement

modern feeds and safeguard against over-supplementation. Each product is made with high-quality ingredients, added at effective levels, in certified manufacturing facilities. KKP offers a quality assurance promise backed by a money-back guarantee.

NONPROFIT CORPORATE MEMBER

Equipava, Inc.

Equine film and video archives

Contact: Sally Lasater

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Allen, TX 75002

Phone: 805-630-2242

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admin@equipava.org

www.equipava.org

www.pegasustv.org

Equipava, Inc. is a non-profit organization dedicated to the sourcing and documentation of film and video focusing on the history, knowledge and heritage of the horse and horse cultures throughout the world, and the establishment of an online digital video archive dedicated to the equine.

COUNTING DOWN TO GRADUATION

BY: ERICA LARSON, AHP 2009 STUDENT AWARD WINNER



As I sit here, wrapped in a blanket with a hot cup of tea steaming beside me, I'm realizing that I'm down to the wire. There are just four weeks until my graduation and the reality of the situation—just a few more tests and a couple more papers before I'm officially an equine journalist! I can't wait!

Midterms are over and I'm happy to say that I passed them all! I've got quite a short week in school this week, as I am travelling to Florida to attend the National Riding

Instructors' convention. Thankfully, all my professors were very understanding and have agreed to work around my schedule.

I'll be back in school for a week or so after the ARIA Convention, but then I'm headed down to visit my good friends at the United States Eventing Association and help out at their Convention as well. I can't wait until school is over and I can spend more time doing what I love!

Until next time, stay warm and I hope you had a wonderful Thanksgiving!

TECH TIPS ADDING-ON THE ENEMY?

BY: JEREMY LAW, AHP EDITOR

Our industry needs advertisers to survive—the recession made that apparent. So, how do we rationalize our own irritation with online advertising that flashes, blinks or pops-up as we browse the web?



"That's different," we might say, or "I'd never allow something that obnoxious on my site. Nonetheless, all we lovers of advertisers have at one time or another been virtually accosted by annoying or aggressive online advertising.

Enter our secret friend: Readability. It's an add-on for both Windows and Mac users who previously relied on their browser's print preview function to read otherwise insufferably busy web pages.

Readability is added as a "bookmarklet" to your browser's toolbar. When you want to read a particular web page in peace, simply click on the Readability button and the page is instantly cleaned up.

The Readability version of the web page has buttons that allow you to email the cleaned page, print the cleaned page, or—if you're racked with guilt—simply reload the original, ad-packed monstrosity.

Visit <http://lab.arc90.com/2009/03/02/readability/> for more information and to pick up the free Readability add-on.



Before
Readability



After
Readability