

## **Results from 2015 AHP Equine Industry Survey**

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American Horse Publications (AHP) conducted its third online nationwide equine industry survey from January 6<sup>th</sup>, 2015, through April 1<sup>st</sup>, 2015. 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. Upon the conclusion of the survey, 11,307 responses were collected. After removing duplicates, respondents from outside the U.S., invalid zip codes, and non-horse owners or managers, there were 10,662 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: respondent demographics, horse ownership, horsekeeping costs, issues facing the equine industry, and horse health care (including vaccination, deworming, and use of sedatives/tranquilizers). 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 (Tab 1)**

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, accounting for 23.9% and 28.1% of the respondents, respectively. Overall, 63.1% of respondents are age 45+. 92.6% of the respondents are female. The distribution of responses geographically is somewhat uniform. Table 1 provides a description of the zip code regions. The largest number of responses came from zip code region 9, which constitutes 14.5% of the responses; the smallest number of responses came from zip code region 0, which constitutes 7.4% of the responses. 49.2% of the survey participants had reported annual household incomes (before taxes) of less than \$75,000; 13.2% of the respondents had annual household incomes of at least \$150,000. Tab 1 illustrates the annual household income distribution by zip code region.

<b>Zip Code Region</b>	<b>Zip Codes Included</b>	<b>States Included</b>
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 2.6 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 1.7, and 86% of the survey participants indicate that either one or two household members are involved with horses.

### **Horse Ownership** (Tab 2)

The second section of the survey focuses on horse ownership as well as the ways in which respondents are involved with the horse industry. 93.4% of the respondents indicate that they are horse owners, and 20.6% identify themselves as barn/farm managers. Just under 62% indicate that they are pleasure riders, and 33.9% indicate that they ride competitively. More than 15% of respondents indicate that they are riding instructors and/or horse trainers, and 12.8% report being breeders.

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 0.32 foals, 0.8 young horses, 3.6 mature horses, and 2.9 senior horses. A new question this year asked respondents to identify the number of horses they owned and/or managed which were currently idle, retired, or otherwise not working. Respondents had an average of about 2 horses each that fell into this category.

One new question asked respondents to identify how they viewed their horses, with the following options: best friend, companion animal, employee, family member, investment, livestock animal, performance partner, and pet. Respondents were allowed to choose all options that applied. The most frequently chosen options was family member (67.4%), followed by companion animal (62.7%), performance partner (57.6%), and pet (52.9%). A smaller percentage of respondents viewed horses as an investment (22.4%), livestock animal (21.1%), and employee

(7.8%). There did not seem to be any consistent trends when analyzing this perception of horses across age, income, or geographical region (see Tab 2).

21.7% of respondents indicate that at least one horse is insured, with the highest frequency of insured horses occurring in zip code region 0 (26.0%) and the lowest frequency occurring in zip code region 8 (18.5%).

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 3 – 4)*

70.6% of the respondents indicate that the number of horses they currently own is the same as it was last year. About 13.7% of respondents own more horses than they did last year, and the remaining 15.7% own fewer horses than they did last year. This result may suggest continued increasing stability compared to the 2009-2010 and 2012 surveys. When considering their future expectations on horse ownership, 67.9% 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, 20.7% expect to own more horses in 2016, while 11.4% expect to own fewer horses.

When considering the number of horses owned/managed geographically, the average number of horses owned/managed generally 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 8.0 in zip code region 5. Furthermore, individuals in the highest income brackets (\$150,000+) own more horses on average (7.7), while those with income in the \$100,000 - \$124,999 range own the least (5.9). Finally, the average number of horses owned/managed by 25 – 34 and 35 – 44 year olds is highest (7.2 and 7.6, respectively) and by 18 – 24 year olds in lowest (5.6).

The highest percentage of respondents owning/managing more horses in 2015 than in 2014 are in zip code regions 7 (17.9%) and 8 (16.1%). The highest percentage of respondents managing fewer horses in 2015 than in 2014 are in zip code regions 4 (17.3%) and 2 and 6 (16.8%). The highest percentage of respondents expecting to own/manage more horses in 2016 than in 2015 are in zip code regions 7, 6, and 4 (24.9%, 22.2%, and 21.5%, respectively), 20.05%, and 19.60%, respectively). The highest percentage of respondents expecting to own/manage fewer horses in 2016 are in zip code regions 3, 8, and 5 (12.8%, 12.7%, and 12.6%, respectively).

Respondents in the top and bottom income categories reported a higher frequency of owning/managing more horses than they did in 2014 (15.1% and 14.3%, respectively), while respondents in the lowest income category were also most likely to own/manage fewer horses

than they did in 2014 (17.9%). However, those same respondents were most likely to expect to own/manage more horses in 2016 (23.9%).

When analyzing the trends in horse ownership by age, some interesting results emerge. The frequency of owning/managing more horses in 2015 than in 2014 is decreasing by age category; 22.1% of respondents in the 18-24 age category report owning/managing more horses in 2015 than in 2014, while only 7.6% of respondents in the 65+ age category report owning/managing more horses. This pattern is also consistent with expectations on horse ownership in 2016. 36.2% of respondents in the 18-24 age category expect to own/manage more horses in 2016 than they do this year, and this diminishes to 8.9% for respondents in the 65+ age category.

### *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. 44.0% of respondents pay for riding lessons, and 28.8% pay for someone else to train their horse.

### *Use of Horses (Tabs 5 - 7)*

In addition to identifying their involvement with the horse industry, survey participants were asked to identify all ways in which they used their horses. 71.7% of the respondents at least sometimes use their horses for pleasure/trail riding. After pleasure/trail riding, the next most commonly identified “use” is idle, retired, or otherwise not working (29.4%), followed by dressage (27.5%). Using horses for lessons or training (24.9%) and natural horsemanship (22.3%) represent the other most frequently reported uses.

The use of horses depends on respondents’ geographic location. Tabs 5 and 6 rank the frequency of each use geographically as well as the ranking of zip code region within each use according to frequency. Tab 7 illustrates the geographic differences across all uses. To briefly summarize the results, it appears that in general, 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 8)*

Survey participants indicate that they expect to compete in an average of 5.4 events in 2015. This is similar to the average number of competitions reported in both the 2009-2010 and 2012 studies. As in 2012, respondents living in zip code region 7 reported competing more than those in all other geographic locations on average. In addition, the average number of competitions is generally increasing across income groups and decreasing across age groups, with the exception of the 45 – 54 year old category.

There is some evidence that those with incomes of \$125,000 or greater competed more in 2015 than in 2014. Those in the younger age groups (18 – 34 years of age) appear significantly more likely to have competed more in 2015 and expect to compete more in 2016.

### **Horsekeeping Costs (Tab 9)**

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 in the past year. 70.3% of the respondents (down from 81.8% in 2012) 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. 39.5% of the respondents indicate that veterinary services have increased the most in the past year. The third most commonly identified area of increased costs is animal health products (34.5%). In the previous two surveys, increased fuel costs were of major concern; however, the current survey suggests that falling gas prices have eased concerns in this area.

Owners and managers utilize different approaches to cope with expected increased costs. Most respondents (65.1%) indicate that they will reduce expenditures in other areas of their lives to cope with the increased horsekeeping costs. 26.2% of respondents will seek ways to increase income, while 26.1% of the respondents indicate that they plan on attending fewer competitions. A little less than 20% of respondents indicate that they will reduce the number of horses they maintain. Partial leases are still not very attractive; less than 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 10 – 13)**

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 54% 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 (40.1%), overbreeding (34.5%), owners who don't understand horses (32.6%), the loss of trails and riding areas (31.0%), and competition for open space from other agricultural commodity producers or developers (27.0%) were the next most frequently identified issues. The top five issues identified remain the same from the 2012 survey.

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

The unwanted horse issue still appears to be equally relevant across the country, while in general, 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 regions 9 and 2. Competition for open space seems to be of more concern moving towards both coasts.

While disease outbreaks were not commonly identified as one the top three issues, those in zip code regions 5, 6, and 8 identify them as an issue about twice as often as those from other regions. The issue of horses going to slaughter appears to be of increasing concern going from west to east across the country. A related issue, not having the option of slaughter in the United States, is identified as a bigger concern in the western half of the United States, with the exception of zip code region 9.

Among some of the top 6 issues identified, there are also some interesting patterns in responses based on age of the respondents. The unwanted horse issue is of significantly more concern in respondents age 45+ than those under 45. As in the 2012 study, the youngest respondents are most concerned about overbreeding; this decreases across age categories. Also similar to the 2012 study, loss of trails and riding areas becomes of increasing concern as age increases; this same pattern exists in the closely-related issue of competition for open space.

## **Horse Health Care**

Horse owners and managers are most likely to make horse health care decisions themselves regardless of whether their horse is kept at home or boarded; they are about three times as likely to make the decisions themselves than to make health care decisions in combination with other professionals, such as barn/farm managers, trainers, and/or veterinarians. A change in the alternatives from the previous two surveys makes the responses difficult to compare.

Following this general question, respondents were asked more specific questions regarding vaccinations, deworming, and the use of sedatives.

### *Vaccinations*

Nearly 75% of respondents indicate that their veterinarians are involved in determining their horses' vaccination schedules. Veterinarians administer the vaccines over 60% of the time, followed by horse owners/managers themselves (31.5%). Only 10% of respondents request a specific brand of vaccine from their veterinarian. Horse owners/managers frequently discuss with their veterinarian what their horse is being vaccinated for (84.7%). Less frequently but still about

half of the time, respondents discuss what to expect when vaccinating (51.0%) and the number of vaccine injections the horse is receiving (46.4%) with their veterinarian. The injection site location is discussed by 34.7% of the respondents and their veterinarians.

For West Nile Virus, Western and Eastern Equine Encephalomyelitis, Rabies, Equine Herpesvirus, and Equine Influenza, a majority of respondents vaccinate once a year (58% - 72%, depending on the vaccine). However, it is not uncommon for respondents to vaccinate against these diseases twice a year (about 20%), with the exception of rabies (only 3.6% of respondents vaccinate against rabies twice year). Very few respondents vaccinate their horses more than twice a year for any disease. Leptospirosis and strangles are not vaccinated against by as many respondents; 45.4% of respondents do not vaccinate against leptospirosis, and 39.5% do not vaccinate against strangles.

About 78% of respondents purchase vaccines from their veterinarian. Unsurprisingly, veterinarians are overwhelmingly the largest source of influence on the decision to purchase vaccines (66.8%), with price being a distant second (9.1%).

### *Deworming*

The second set of horse health questions focused on deworming. Respondents were first asked to identify the strategy they used when deworming their horses. Rotational deworming was the most common approach (55.3%), followed by fecal egg counts and deworming according to the results (38.2%), and daily deworming (3.0%). 1.1% of respondents report that they do not deworm their horses.

When asked how often an individual deworms their horses, the most common response was four times per year (27.3%), followed by twice a year (20.9%) every other month (18.7%), and three times a year (16.1%). Respondents also chose the "Other" category often (12.6%), and the most common responses were as needed, based on fecal egg count, or daily.

Over 88% of respondents deworm the horses in their care themselves; 6.6% have their barn managers deworm; these numbers are nearly identical to the 2012 survey. Nearly all horse owners and managers that deworm their horses use a tube/paste dewormer (94.5%); 25.2% report using a gel dewormer.

About half of the respondents (48%) indicate that their veterinarian is involved in developing their horses' deworming schedules; this result continues the increasing trend from 2012 (44.3%) and 2009-2010 (15.7%).

Nearly 80% of respondents indicate that they are concerned about drug resistance in parasites; this figure is nearly identical to the 2012 survey. About 50% indicated that their veterinarian had recommended a fecal egg count; almost 54% had actually had a fecal egg count performed.

Ivermectin is the most frequently used dewormer (74.8%), followed by ivermectin/praziquantel (67.1%), pyrantel pamoate (53.8%), and fenbendazole single dose (49.9%). Moxidectin (28.7%), moxidectin/praziquantel (26.9%), oxibendazole (19.4%), fenbendazole multiple dose (18.8%), and pyrantel tartrate (1.5%) are used less frequently.

About 52% of respondents most frequently purchase dewormers at local feed stores; online websites are the second most frequently identified source for purchasing dewormers (36.9%), and farm fleet/chain stores (like Tractor Supply Company or Southern States) are third (26.3%). Veterinarians have the largest source of influence on which dewormers are purchased (35.0%); in addition, price is a common determinant in which dewormers are selected (22.6%).

### *Sedatives and Tranquilizers*

The final set of health care questions focused on the use of sedatives and tranquilizers. These questions are a new addition to the 2015 AHP Equine Industry Survey.

70% of respondents indicated they had used a sedative or tranquilizer product for their horse. These products were most often used for dental work on the horse (79.5%) and veterinary work (75.4%), followed by shoeing (17.0%) and clipping (16.9%). Almost 94% of respondents purchase sedative products from their veterinarian. 6.4% of respondents sometimes purchase sedative products online, and 5.7% sometimes purchase them from a feed store.

Respondents were asked to report their preferences regarding which sedative product they use. 42.5% prefer an injection given by their veterinarian, and 20.9% prefer a sedative dispensed by their veterinarian. Acepromazine was preferred by 16.3% of respondents, Dormosedan Gel by 8.4%, Xylazine/Rompun by 5.9%, and Calm and Cool by 2.8%

### **Summary**

The 2015 AHP Equine Industry Survey follows the 2012 and 2009-2010 surveys. With results from three surveys now, it is possible to better understand participation trends and management practices in the U.S. equine industry, changes (if any) in 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.

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

- 1) A little over 70% of respondents own/manage the same number of horses they did last year, suggesting a continued increase in stability in the number of horses compared to the previous two surveys. In addition, the proportion of respondents who expect to own or manage more horses in 2016 is a few points higher than the one-year forecast from the previous survey.



- 2) Based on results from the study, it appears that there is also stability in the number of competitions that respondents expect to attend this year and next. Similar to the 2012 survey, most of the increase in competitions is occurring among the younger age groups.
- 3) The relationship between humans and horses is complex. Respondents were most likely to view their horses as family members, companion animals, performance partners, and/or best friends. This is perhaps cemented by the statistic that an estimated 1/3 of horses owned/managed by respondents are idle, retired, or otherwise not working.
- 4) Veterinarians play an integral role in horse health. They have a large influence in vaccination decisions, and it appears that their influence in deworming approaches may also be increasing; there was a slight but noticeable increase in the percentage of respondents who had a fecal egg count conducted.

As in the 2009-2010 and 2012 surveys, the unwanted horse issue (and what to do with them) is still the most important issue facing the industry today; however, the percentage of respondents identifying that issue has been declining (62.9% in 2009-2010, 55.8% in 2012, and 53.7% in 2015). The cost of horsekeeping and overbreeding continue to be important issues, but land-related issues, such as loss of riding areas and competition for open space, appear to be becoming increasingly more important compared to 2012.

From the study, in terms of horse ownership and participation, it appears that the equine industry has stabilized in its recovery from the decline following the Great Recession of 2008-2009. There is some indication that respondents expect to be slightly more active in the future if economic conditions remain constant.