

# Equine Industry Poised

FLORHAM PARK, N.J., July 31, 2015 —

The equine industry has found stability and shows positive signs of growth, especially among young adult horse owners and event participants, according to results of a survey by American Horse Publications (AHP) sponsored by Zoetis. The survey included responses from over 10,662 horse owners.

Among the highlights, the third online nationwide equine industry survey shows:

- For 2016, 88.6% of respondents expect to own or manage the same number of horses or more horses.

- This year, 93% of respondents plan to enter the same or more competitions than last year, and 95.1% expect to compete in the same or more events in 2016.

- A high number of respondents (84.7%) rely on their veterinarians for vaccination advice, and respondents are increasingly relying on veterinarians for deworming advice.

“It appears the industry is beginning to recover from the Great Recession of 2008, as indicated by the percentage of respondents

Looking at horse ownership by age, the future appears bright for the equine industry, with 22.1% of respondents ages 18 to 24 reporting they own or manage more horses in 2015 than they did in 2014, while only 7.6% of respondents age 65 or over reported owning or managing more horses. This pattern is consistent with expectations of horse ownership in 2016, as 36.2% of respondents ages 18 to 24 said they expect to own or manage more horses than they did this year.

Additionally, there appears to be stability in the number of competitions respondents expect to attend this year and next year. Similar to the 2012 survey, most of the increase in competitions is among younger age groups.

## RELATIONSHIP WITH THE HORSE

Based on a new question this year, the survey results reflected the complex relationship between humans and horses. Respondents were most likely to view their horses as family members (67.4), companion animals (62.7%), performance partners

## *The third American Horse Publications survey shows horse ownership and involvement*

participating in the industry, either through owning/managing horses or competing with them, at the same or greater levels than three years ago,” said Jill Stowe, Ph.D., associate professor of agricultural economics at the University of Kentucky, who analyzed the data and consulted on the results.

The survey was conducted from Jan. 6 through April 1, 2015. It sought 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.

AHP conducted similar surveys in 2012 and 2010. AHP is a nonprofit professional association dedicated to promoting excellence in equine media and better understanding and communication within the equine publishing industry.

## INDUSTRY STABILITY

The 2015 survey results show 70.6% of respondents own or manage the same number of horses they did last year, suggesting a continued increase in overall industry stability. In addition, 20.7% of respondents expect to own or manage more horses in 2016, while 11.4% expect to own fewer horses. In the 2012 survey, only 18.7% said they expected to own or manage more horses the following year, and 14.7% expected to have fewer.

(57.6%) and/or best friends (55.9%). A smaller percentage of respondents viewed their horses as an investment (22.4%), livestock animal (21.1) or employee (7.8%).

Results also show an estimated one of every three horses owned/managed by respondents is idle, retired or otherwise not working.

## HORSE HEALTH CARE

Respondents continue to identify veterinarians as integral to horse health decisions, including vaccinations and deworming.

Veterinarians continue to have a strong influence over vaccination decisions, with 84.7% of respondents saying they discuss with their veterinarian what vaccinations their horse should receive. Those discussions most often include vaccinating for West Nile virus, Western and Eastern equine encephalomyelitis, equine herpesvirus and equine influenza.

A majority of respondents vaccinate once a year (58% to 72%, depending on the antigen). However, about 20% of respondents vaccinate against these diseases twice a year. Vaccination also presents an opportunity for veterinarians to discuss the American Association of Equine Practitioners (AAEP) vaccination recommendations with their clients, as just 30% of respondents said they reviewed these recommendations with their veterinarian.

# for Growth

It appears the influence of veterinarians on deworming approaches is increasing, as there was a slight increase compared with previous surveys in the percentage of respondents who had a fecal egg count (FEC) conducted and who said their veterinarian is involved in developing their deworming schedule.

Rotational deworming was the most common approach used (55.3%), despite recent recommendations from AAEP to conduct FECs and deworm based on results, which came in second (38.2%), according to the results. Less than half of respondents (47.5%) indicated their veterinarian recommended an FEC. Nearly half (46%) of horse owners deworm their horses four to six times per year. Almost 80% of respondents said parasite drug resistance was an issue of concern, similar to 2012.

Overwhelmingly, respondents deworm their horses themselves, at 88.6%, which was nearly identical to the 2012 survey results. But about half of the respondents (48%) indicated their veterinarian is involved in developing their horses' deworming schedules. This trend has continued to increase, from 15.7% in 2010 to 44.3% in 2012.

owners, as just 5.8% indicated outbreak was an issue. While concern is low, veterinarians can help horse owners lower their risk of infection by advising vaccine protocols to meet horses' risk levels, including travel and show requirements, such as following the vaccine requirements of the United States Equestrian Federation (USEF).

## ABOUT THE SURVEY

The 2015 survey was limited to those who currently own or manage at least one horse, are 18 years of age or older and live in the United States. The survey collected 11,307 responses, of which 10,662 responses were useable.

"As a sponsor of the survey, Zoetis is proud to bring additional insight to the equine industry on topics horse owners and managers find important, so we can work together as partners," said Katherine Russo, marketing manager, Equine Vaccines.

"We are thrilled with the cooperation of our members and the industry in participating in this survey," said Christine W. Brune,

*has stabilized and is likely to rise, according to key findings from survey sponsored by Zoetis*

A slight decline in the number of insured horses continues to be a trend in 2015 survey, with just 21.7% of respondents indicating their horses were insured. This presents an opportunity for equine veterinarians to make their clients aware of insurance and to reinforce the need for preventive care, including additional diagnostic and treatment options.

## THE UNWANTED HORSE

As in the 2010 and 2012 surveys, the issue of unwanted horses (and what to do with them) remains the most significant challenge facing the industry today; however, the percentage of respondents identifying the issue has been declining (62.9% in 2010, 55.8% in 2012 and 53.7% in 2015). The cost of horsekeeping (47.1%) and overbreeding (37.3%) continue to be important issues, but land-related issues, such as loss of riding areas and competition for open space, are becoming increasingly important.

Concern over disease outbreak remains low among horse

AHP executive director. "The survey once again demonstrated that our association can provide vital statistics for the equine industry through the power of the media."

The survey results will be released by Zoetis and AHP members through their own channels beginning in July. Results will be available to the general equine industry in fall 2015 for a nominal fee. Excerpts from this study must be referenced as "2015 AHP Equine Industry Survey sponsored by Zoetis." ■

## In your opinion, what are the top three issues facing the equine industry?

