

EQUINE GUELPH
helping horses for life™

2011

Equine Guelph

Industry Survey

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Summary

The Equine Guelph Industry survey was launched February 1st, 2011 and remained open until March 31st, 2011. The questionnaire consisted of 77 questions including multiple choice, ranking and open ended questions. 2,077 people participated in the survey with a completion rate of 67.7%.

The survey was available online through the Equine Guelph website and was distributed to our membership through our E-News database. We also received significant support from the equine industry to help promote and distribute the survey in order to reach all industry sectors and equine disciplines. A variety of media and social mediums were also used in the distribution of the survey. These included association websites, media websites, targeted email distribution, newsletters as well as Facebook, Barnmice, Twitter and blogs.

Survey results highlight the growth and viability of the Ontario horse industry with 82.7% of respondents seeing themselves participating in the horse industry as long as they can. 33% of respondents have been involved in the industry for more than 30 years, showing a strong commitment to the industry. 61.8% of horse owners are planning or might plan on expanding their personal herd in the future (a 10.8% increase from 51% of horse owners in B.Wilton's 2009 study), suggesting strong confidence in the horse industry.

The industry believes that Equine Guelph's #1 mandate is to provide education and training material for the horse industry with 99% of respondents stating that equine education is important for the horse industry.

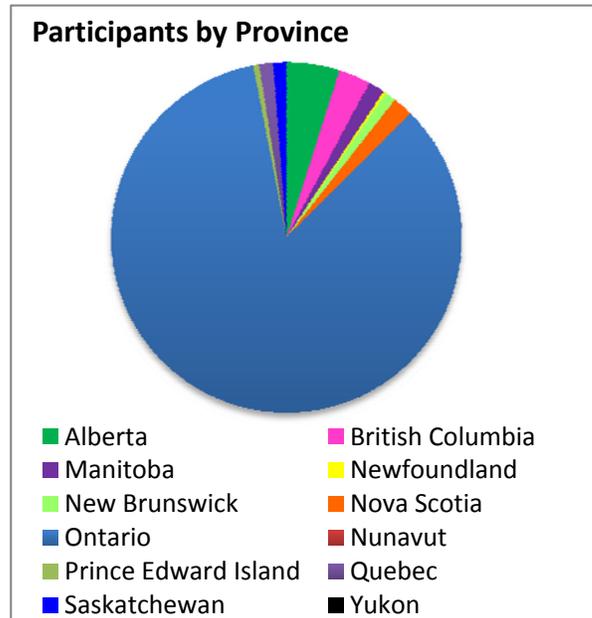
Survey results indicate that the horse industry as a whole is keen to receive more research and horse-related information in a quick and easily accessible format. E-News (email newsletters) was the #1 preferred method of acquiring new horse-related information with 80.5% of respondents wanting more information on Equine Guelph research. Regardless of discipline, age group or profession, the industry as a whole seems to be thirsting for knowledge about the horse.

Results

I) Industry Demographics

Survey Participants

Canada	90.5%
United States	7.5%
United Kingdom	1.2%
Australia	0.2%
Afghanistan	0.1%
Argentina	0.1%
Germany	0.1%
Indonesia	0.1%
Ireland	0.1%
Norway	0.1%
Pakistan	0.1%
Spain	0.1%
Switzerland	0.1%



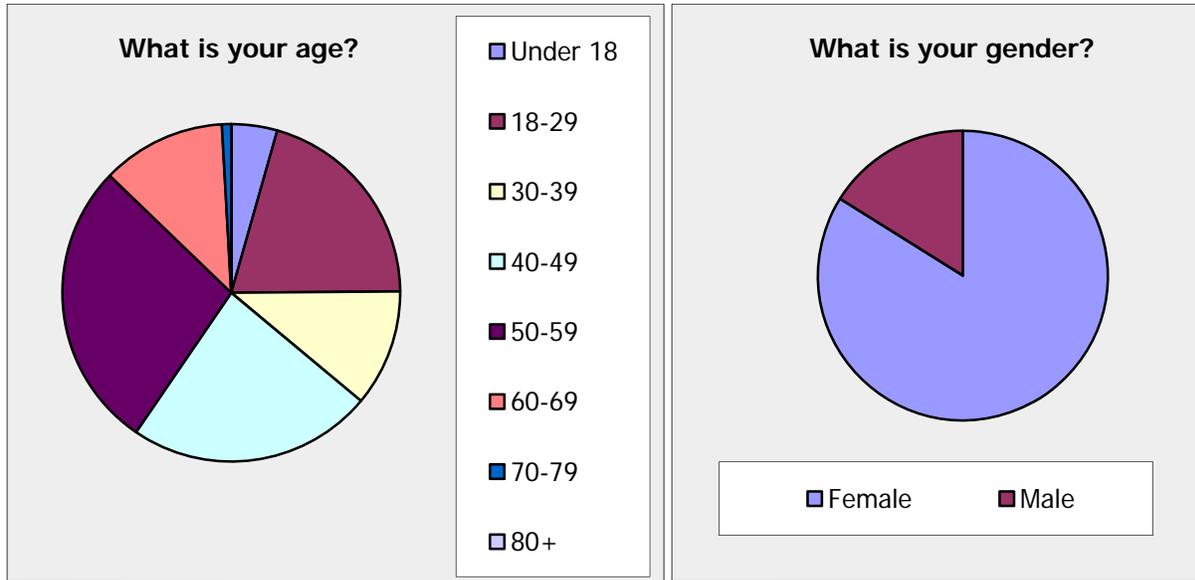
Industry Role/Disciplines

- Out of 20 specified roles in the industry, the top 3 roles are:
 1. Owner (37.7%)
 2. Rider (20.2%)
 3. Breeder (8.0%)
- Out of 16 specified disciplines, top 3 disciplines participated in the most are:
 1. Pleasure Riding
 2. Hunter/Jumper
 3. Dressage
- 86.4% are involved in more than 1 discipline, showing that most people are involved in more than 1 sector of the industry
- 13.4% of respondents chose racing (Standardbred, Thoroughbred and Quarter Horse) as their primary discipline and 9% chose racing as a secondary discipline

Interesting note: 10.4% of respondents do not think they are part of the horse industry; although 60.6% of them are horse owners and 93.75% of them indicated they participate in 1 or more disciplines.

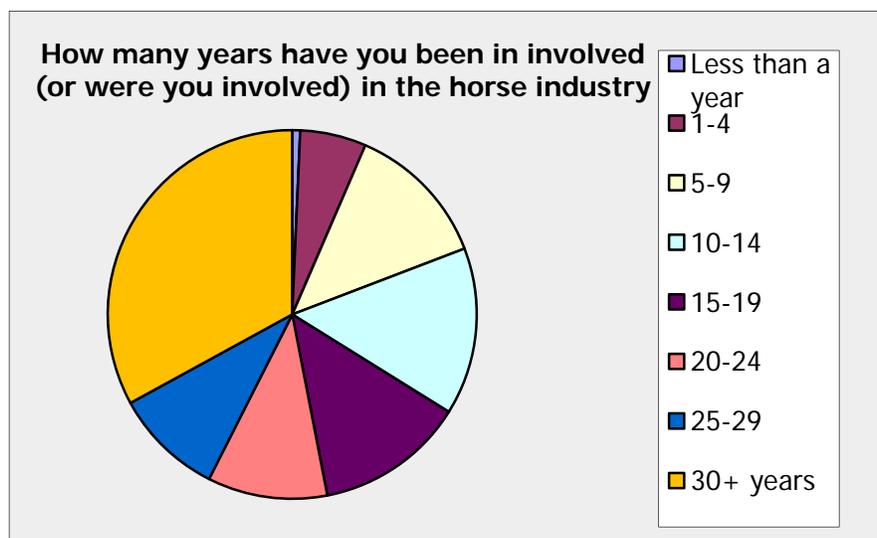
Age & Gender

- 83.9% of survey respondents were female and 16.1% were male
- All age groups were represented in the survey, however top 3 age groups were 50-59 followed by 40-49 and 18-29.



Viability of Horse Industry

- **82.7%** of respondents see themselves participating in the horse industry **as long as they can**, showing a strong commitment to the horse industry - 33% of respondents have been involved in the industry for more than 30 years

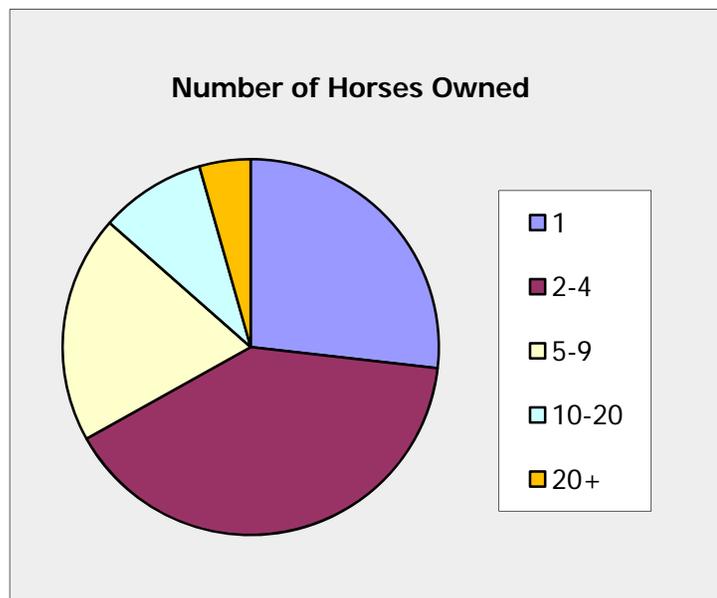


Note: Good cross section of length of time involved in the horse industry. There is a gap to reach newcomers to the industry (only 0.7% of participants were identified being involved in the horse industry less than a year).

- 61.8% of horse owners are planning or might plan on expanding their personal herd in the future (a 10.8% increase from 51% of horse owners in B.Wilton's 2009 study), suggesting a strong commitment and confidence in the horse industry

Horse Ownership

- 83.5% of respondents are horse owners, with 2-4 horses being the most common number of horses being owned
- 58% of horse owners keep their horses on their property

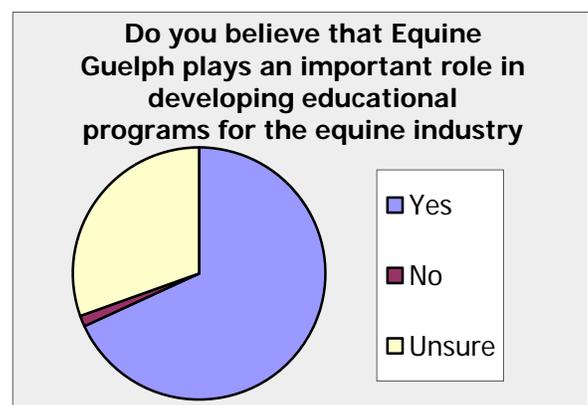
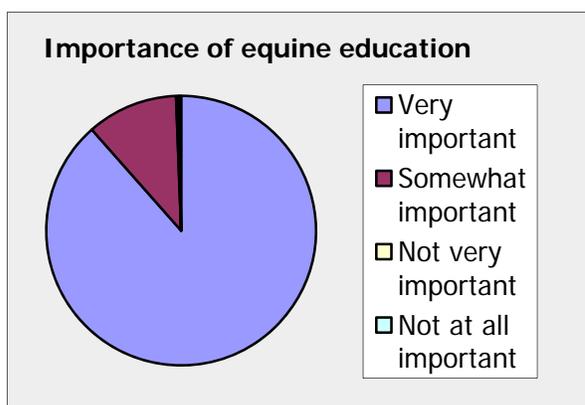


Industry Income

- The horse industry provides 54.1% of respondents with a source of income suggesting that half of the respondent are considered "industry professionals"
- Top 3 sources of income are:
 1. Employment
 2. Boarding
 3. Coaching

II) Education

- The industry believes that Equine Guelph's **#1 mandate** is to provide education and training material for the horse industry
- 82% of participants responded that their highest level of **education was not equine-related**. This demonstrates a need for continuing education within the horse industry. Unlike other agricultural industries where professionals are trained in their area of expertise, individuals that participate in the horse industry could have other careers and their involvement could be recreational or as a second career. Therefore the training and education may need to be specific to the horse industry.



- **99% of respondents believe that equine education is very or somewhat important for the horse industry**
- 68.2% believe that Equine Guelph plays an important role in developing education programs for the equine industry
- **Time** (35.7%) and **cost** (41.7%) are barriers for respondents acquiring further education. It is not from a lack of interest (2.8%). This suggests a **gap** in the delivery of education to the horse industry and that educational material should be quick, easily accessible and provided at low cost. Sending educational material via e-mail and video are possible delivery vehicles that could achieve this, in a highly cost effective manner.

Interesting Note: Both Equine Guelph's youth travelling education program, EquiMania!, and Equine Guelph's online tools are novel and interactive learning platforms. 86.3% of people that visited EquiMania! believe that the interactive nature of EquiMania! **enhanced**

their learning while 73.5% of people that have used the online tools found the format of the tool **helpful to their learning experience**. Although different, both methods of delivering education and horse-related information to the horse owner demonstrate Equine Guelph's ability to disseminate information in an understandable format.

Educational Priorities

- Top 5 ranked horse-related topics that respondents wanted to learn more about?
 1. Behaviour
 2. Breeding and Foaling
 3. Diseases
 4. Colic
 5. Biosecurity

- Top 3 ranked educational priorities for the horse industry (based on respondent ranking):
 1. Equine Management
 2. Breeding
 3. Horse Health

III) Research

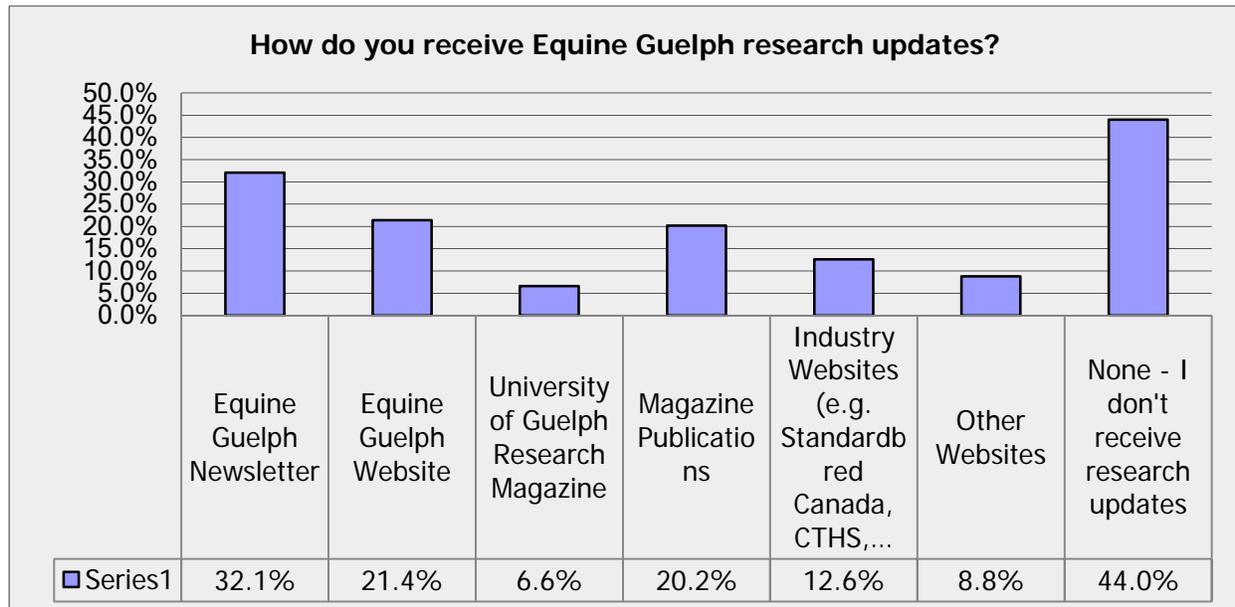
- **99.6%** of respondents believe that **research is important** for the horse industry, whereas 89.1% believe that research is needed for a viable equine industry

Research Priorities

- Ranking of top 3 priority areas of research:
 1. Diagnosis Techniques
 2. Nutrition
 3. Genetics

- Ranking of top 3 research topics:
 1. Causes of injury during training and performance
 2. Development/growth disorders in foals
 3. Problems with the reproductive system (e.g. infertility, stillbirths etc.)

Research Dissemination



- 44% of respondents don't receive research updates from Equine Guelph - this demonstrates that Equine Guelph needs to **expand** the communication channels and venues to increase reach within the industry
- **80.5%** of respondents would like to **receive more information** on Equine Guelph research and 62.2% would prefer to **receive it via e-mail**

IV) Communication

Information Sources

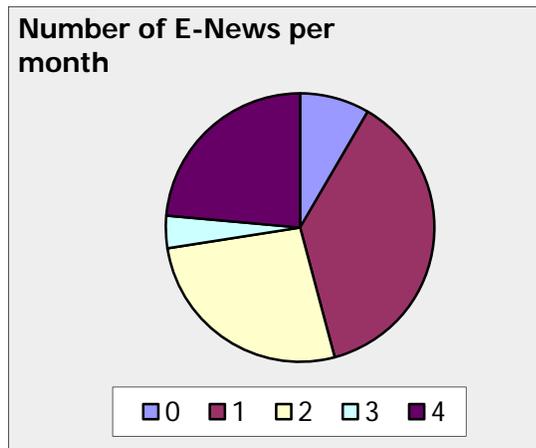
- Top 5 sources for acquiring horse-related information:
 1. Coaches
 2. Educational Institutions (e.g. Equine Guelph, University, College)
 3. Veterinarians
 4. Books
 5. Internet/Web
- Top 5 preferred methods of acquiring new horse-related information
 1. E-News (email updates)
 2. Internet Searches
 3. Magazine Publications
 4. Audio/Video Tutorials
 5. Live Seminars

Internet Access

- 92.3% of the respondent are using a form of **high speed internet** (cable, DSL, satellite), suggesting that **video streaming** could be usable and accessible delivery vehicle for information to the horse industry
- 93.5% of respondents are on the internet **daily**, with 99.4% having an email address

E-News (*Equine Guelph E-Newsletter is distributed electronically to approximately 5,000 industry members 1x/month*)

- Of the respondents receiving the E-News, 88% find the E-News informative
- The majority of respondents (64.2%) would like to receive the E-News 1-2x/month which falls in line with our current distribution frequency



- Topics that respondents would like to be included in E-News:
 - **Research updates** (87.1% of respondents)
 - Ask the Expert (82.8% of respondents)
 - Seasonal Health Reminders (70.0% of respondents)

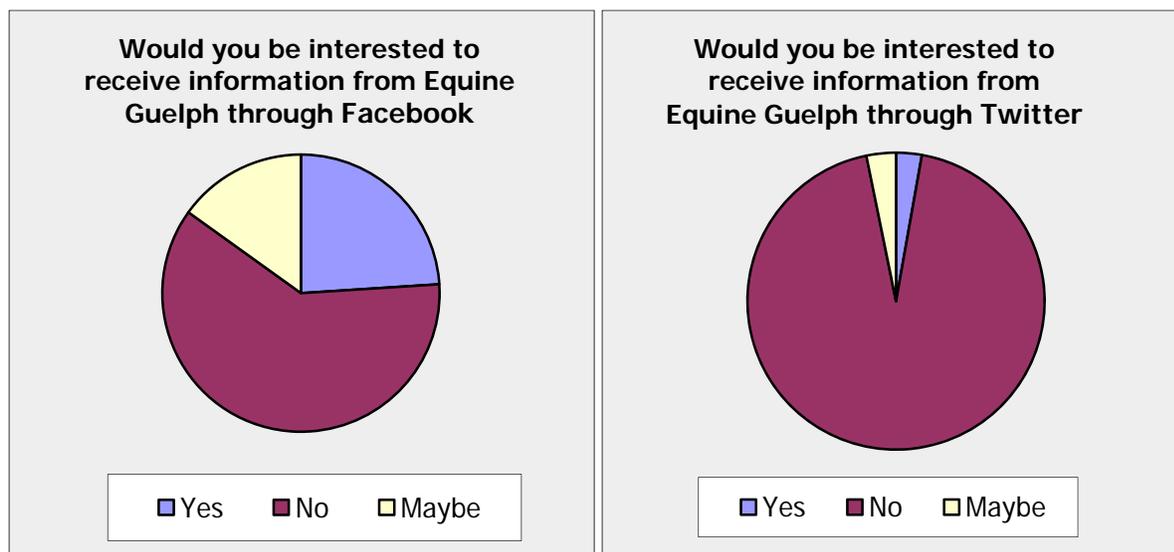
Printed Newsletter (*distributed 2x/year with research updates, news about Equine Guelph programs and upcoming events. The fall edition is an expanded version focused on equine research*)

- 78.3% of respondents **do not receive the printed Equine Guelph newsletter** - this reinforces the suggestion to disseminate research information through electronic mediums (e-news, online videos...) since expanding the printing and distribution of newsletters is cost-prohibitive at this time

- 93% of those receiving the newsletter find it generally informative (39.1% very informative, 53.9% somewhat informative), however this does suggest some room for content improvement
- 69.9% of people would like to receive the printed newsletter 4x/year (currently distributed 2x/year), however cost is a barrier for Equine Guelph's current funding position - this reinforces the need to disseminate information in a cost effective model for both EG and the industry

Facebook/Twitter

- 24% of respondents want to receive information through Facebook whereas only 2.8% through Twitter



- Younger respondents had slightly higher interest in receiving information through Facebook and Twitter, suggesting that there should be further investigating of the use of social media to reach and engage younger generations within the horse industry and develop a model that is ready to adapt to a changing future.

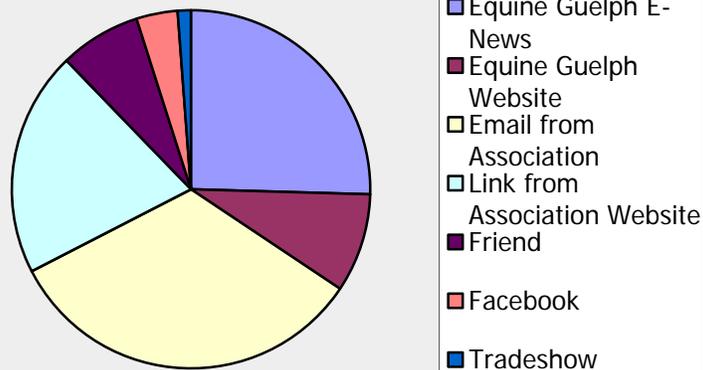
Would you be interested to receive information from Equine Guelph through Facebook?

	<30 yrs	30-60
Facebook		
Yes	44.4%	22.5%
Maybe	26%	14.6%
Twitter		
Yes	5.5%	2.7%
Maybe	5.0%	3.3%

Industry Support

- 53.3% heard about the Equine Guelph industry survey through industry associations (email or website link), showing a strong support from our industry

How did you find out about the Equine Industry survey?



List Associations/Partners that promoted and distributed the survey

4-H Canada
Canadian Pony Club
Canadian Quarter Horse Association
Central Ontario Standardbred Association
Canadian Thoroughbred Horse Society
Equine Canada
National HBPA (US)
OMAFRA – Ontario Ministry of Agriculture Food and Rural Affairs
Ontario Association of Equine Practitioners
Ontario Equestrian Federation
Ontario Federation of Agriculture
Ontario Harness Horse Association
Quarter Horse Racing Owners of Ontario
Standardbred Canada
The Horsemen's Protective & Benevolent Association (*Ontario Chapter*)
University of Guelph – *Kemptville Campus*
University of Guelph – *Ridgetown Campus*
University of Guelph – *Campbell Animal Welfare Institute*
University of Guelph – *Ontario Veterinary College*

Media/Tradeshows Support (sample)

The Rider
Canadian Thoroughbred Weekly
Inside Wellington
Can-Am All Breeds Equine Emporium
EquineChronicle.com
Horse Sport
TheHorse.com*
Bloodhorse.com*
theHarnessEdge.com*
Northern Horse.com
EquineChronicle.com
EquineScienceUpdate*
KER.com* (*Kentucky Equine Research*)
Wellington Advertiser

**International Media*